ellucian™

Banner Advancement
Data Load/Extract Handbook

Release 8.6.1
June 2013

Revision History

Publication Date	Summary
June 2013	New version that supports Banner Advancement 8.6.1 software.

Banner Advancement 8.6.1
Data Load/Extract Handbook

Contents

1 Introduction

You can load data from third-party products to Banner® Advancement. You can also extract data from Banner for use by third-party products. There are two ways to transfer data between Banner and third-party products:

- Data files

- Advancement Connector

Data files

The following Banner Advancement processes use data files to transfer data between Banner and third-party products:

APPDEXT	Directory Data Extract Process
AGPMATC	Matching Gift Data Load Report
APPCUPD	External Ratings and Directory Load Process
AGPEXGF	External Gift Load Process

Chapter 2, "Data Transfers Using Data Files" provides detailed instructions for setting up a data extract or data load process and running each process.

Advancement Connector

The Advancement Connector is a Banner Advancement module that uses Web services to transfer data between Banner and third-party products. Chapter 3, "Data Transfers Using the Advancement Connector" provides detailed instructions for using the Advancement Connector to load data between Banner Advancement and Encompass, a Web-based social networking tool available from iModules.

2 Data Transfers Using Data Files

The following processes in Banner® Advancement use data files to transfer data between Banner and third-party products:

Process		Description
APPDEXT	Directory Data Extract Process	Extracts alumni information from Banner for third-party vendors that produce directories
AGPMATC	Matching Gift Data Load Report	Loads employer matching gift policies and procedures into Banner
APPCUPD	External Ratings and Directory Load Process	Loads alumni information from third-party vendors that produce directories into Banner
		Loads external ratings data into Banner
AGPEXGF	External Gift Load Process	Loads gift and pledge payment details from third-party vendors into Banner

This chapter provides detailed instructions for setting up a data extract or data load process and running each process.

Set up a data load or a data extract

You must set up the data load or data extract before you load or extract data. Setup for a data extract and setup for a data load are similar. Use the following steps to set up a data load or a data extract:

- Step 1, "Define the third-party vendors or external systems" (data load only)
- Step 2, "Define the data file"
- Step 3, "Review the fields that are available for data load or data extract"
- Step 4, "Map external values to Banner values" (data load only)
- Step 5, "Review available Banner data fields"
- Step 6, "Define the format of the data file"

-

-

-

The following sections provide detailed instructions for each step.

Step 1   Define the third-party vendors or external systems

📝 **Note**

> This step applies to data loads only. Skip this step if you are setting up a data extract. ■

Use the Data Source Identifier Validation Form (ATVDSRC) to define the third parties that provide data to be loaded. You only need to define vendors and external systems that send data that differs from existing Banner values. You do not need to define vendors and external systems that send data that matches Banner values.

Field	Description
Code	Code that identifies the vendor or external system that sends data to you. Maximum length is 10 characters. Required.
Description	Description or name of the third-party vendor. Maximum length is 60 characters. Required.
Activity Date	Date when the record was created or last changed. Display only.
User	ID of the person who created or last changed the record. Display only.

Step 2   Define the data file

Use the Data File Validation Form (ATVTAPE) to define the basic characteristics of each data extract or data load file that you use. The file can be character delimited or fixed length:

- Character delimited - A special character (such as a comma) separates each field in a record. This special character is defined in the **Delimiter** field. The following figure shows a sample ATVAPE definition for a character delimited file:

- Fixed length - Each field (for example, last name or e-mail address) is a predetermined, constant number of characters. (The length of each field is defined in a later step.) A file is fixed length if the **Delimiter** field is blank. The following figure shows a sample definition for a fixed length file:

Field	Description
File Code	Unique code that identifies a particular file layout for the data extract or data load. Maximum length is 10 characters. Required.
Description	Description of the file layout. Maximum length is 30 characters. Required.
Process	Banner process associated with the file code. You can assign only one process to each file code. Required.
	This is a free format field with no validation; however, the process must be a valid Banner process. Supported processes include APPDEXT, APPCUPD, AGPMATC, and AGPEXGF. For example, to set up a file code to extract data for an alumni directory, you would enter *APPDEXT*.
Delimiter	Character that appears between fields in extract files, or character that is used in data files when a file layout is defined for a data load. Optional.
	If you enter a character in this field, the file is *character delimited*. For example, if you enter a comma (,) in this field and execute an extract that includes name details, your output has a comma between the person's first name and middle initial. If the Banner table does not have a middle initial stored for that person, there would be two commas: *James,,Smith,*.

> ⚠️ **Warning**
>
> Select a delimiter character that does not occur as part of your data, unless you also use a marker. Problems can occur if data fields include the delimiter character. For example, a comma in an address record might cause the field to be stored as two fields rather than one if the comma is misread *after* the record is created. To avoid this problem, use the marker feature to clearly denote the start and end of each field. ■

If you leave this field blank, the file is *fixed length*. Banner assumes that each piece of data is a preset number of characters. Fixed length data files include a file layout definition from the vendor that identifies each field in the data file and its associated length.

Field	Description
Marker	Marker used to denote the beginning and ending of each field. Define a marker if you know that the delimiter character occurs in your data. Banner accepts any single character or number as a marker. Optional. When creating an extract, Banner puts each record from the Banner tables between the markers. When loading data from another system, Banner removes the markers before storing the data. If you define a marker, you must also enter a value for the delimiter. ⚠️ **Warning** Be sure to choose a character that does not occur as part of your data (for example, |). You might get unexpected results if the character used as a marker appears as actual data in the file. ■
Activity Date	Date when the record was created or last changed. Display only.

You can define an unlimited number of extract and load files. Because you can add a new file code every time you want to create a different layout, there is no need to remove or change an existing definition. Banner allows you to track and save the history of previous file definitions, if you wish, by providing the ability to do the following:

- Define a new name.

- Use the copy feature to duplicate the existing definition.

- Make changes, as necessary, to the new record.

Example - fixed length matching gift data load file

Field	Value
File Code	*MG_L_2008*
Description	*Matching Gift load-2008*
Process	*AGPMATC*
Delimiter	blank
Marker	blank

Because the **Delimiter** and **Marker** fields are blank, Banner expects you to define the length of each field on the Data Field Position Rules Form (AGATPFD) (step 6).

Example - character delimited directory load file

Field	Value
File Code	*D_L_ABC_08*
Description	*Directory load-ABC vendor-2008*
Process	*APPCUPD*
Delimiter	*, (comma)*
Marker	blank

The **Delimiter** field tells Banner that a comma separates each data field for each record in the file being loaded.

Example - character delimited directory data extract file with a marker required

Field	Value
File Code	*D_E_ABC_08*
Description	*Directory extract-ABC-2008*
Process	*APPDEXT*
Delimiter	*, (comma)*
Marker	" (quotation mark)

Banner creates a file where every field is in quotation marks and is separated by a comma (for example, *"James","Arnold","Smith","Apt. 2, Building A").* The comma between *Apt. 2* and *Building A* is not a problem for Banner because markers are used. Banner treats *Apt. 2, Building A* as a single item.

Step 3   Review the fields that are available for data load or data extract

Use the Data Field Names Validation Form (ATVTPFD) to review the fields that can be included in your data load or extract based on the selected process. The displayed values are delivered as part of the baseline product and cannot be changed. Not all values listed are available for all processes.

Step 4   Map external values to Banner values

Note

This step applies to data loads only. Skip this step if you are setting up a data extract.

Vendors and external systems might use some codes that are different from the corresponding Banner codes. If this occurs, you must tell Banner what codes to look for and how the codes should be translated.

1. Review the code values on incoming data files to determine if any values differ from those in your Banner tables.

2. Use the Data Translation Field Value Rules Form (APATRAN) to map a vendor's values to the appropriate Banner values.
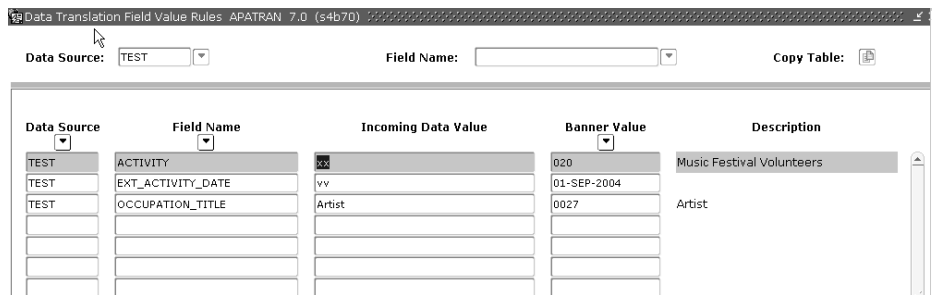
Each vendor requires its own mapping because different vendors use different values. When data is loaded, Banner translates the vendor's values to the appropriate Banner values.

If a vendor's file contains all Banner values, you do not need to create translations on APATRAN. You only need to set up the translations when the vendor's values do not match the Banner values.

Consider an example for `ADDR_COUNTRY`. The vendor might use the code USA for United States of America while Banner uses the code 157. APATRAN would specify, for this vendor (data source) and `ADDR_COUNTRY` (field name), that Banner should look for occurrences of USA and translate each one to 157 when loading data.

📝 **Note**

> The values in Banner tables are uppercase. If the vendor's values are mixed case or lowercase, you must use APATRAN to map the vendor's values to the Banner values. ■

Key block

Fields in this block are used to query data in the Details block. All fields in the key block are optional. If you want to see all records for all data sources and all field names, leave all fields blank and perform a Next Block.

Field	Description
Data Source	Code that identifies the vendor or external system that sends data to you. This code must already exist on the Data Source Identifier Validation Form (ATVDSRC). Optional, unless you are building data translation fields.
	If you enter a value and perform a Next Block, information displayed in the Details block pertains to the data source selected.
	List Data Source Identifier Codes (ATVDSRC)
Field Name	Name that identifies a data field in Banner. This name must already exist on the Data Field Names Validation Form (ATVTPFD). Values are delivered as part of the baseline product. They are the only ones supported for data loads. Optional.
	If you select a value and perform a Next Block, information displayed in the Details block pertains to the field name selected.
	List Field Names (ATVTPFD)
Copy Table	Button used to copy information from one data source to another:

Copy Table (continued):

1. Select the new vendor from the list in the **Data Source** field.

2. (Optional) Select the **Field Name** you want to copy. Leave blank to copy all field names.

3. Click **Copy Table**. The Copy from Another Definition window is displayed.

4. Enter or select the name of the data source to be copied.

5. Click **Copy Definition**. Information from the existing data source is displayed in the Details block.

6. Change the information if necessary and save it.

Data in the key block determines which data source and field receive the copied values. The new vendor cannot have translation details for the selected field (if **Field Name** is entered) or all fields (if **Field Name** is blank).

Details block

This block shows the translations between the vendor's values and Banner values. You can enter new translations or changes entries. Some fields have a pull-down arrow that allows you to select from a list of values.

Field	Description
Data Source	Code that identifies the vendor or external system that sends data to you. This code must already exist on the Data Source Identifier Validation Form (ATVDSRC). Required.
	List Data Source Identifier Codes (ATVDSRC)
Field Name	Name of a data field in Banner. This name must already exist on the Data Field Names Validation Form (ATVTPFD). Values are delivered as part of the baseline product. They are the only ones supported for data loads. Required.
	List Field Names (ATVTPFD).
Incoming Data Value	Value on the incoming data load that needs to be translated to a corresponding Banner value. The value must match what is provided by the vendor *exactly*. Maximum length is 60 characters. Required.
Banner Value	Banner value that corresponds to the value on the incoming data load. Required.
	List Banner Values for Field Name
	Valid values for this field depend on the field name. If the field name has a validation table column associated with it on the Data Field Names Validation Form (ATVTPFD), only the values stored in that validation table column can be used in the **Banner Value** field. They are the only values that appear in the List of Values.
	For example, STVNATN_CODE is the validation table column associated with ADDR_COUNTRY on ATVTPFD. If you are setting up a data load that includes ADDR_COUNTRY, a list of valid country codes from the STVNATN table is displayed when you select the pull-down list for **Banner Value** on APATRAN.
	If a validation table column is associated with a field name on ATVTPFD, you can look up valid values for **Banner Value** by double-clicking the field, selecting the pull-down arrow, or performing a List function from the Help menu. If a validation table column is *not* associated with a field name on ATVTPFD, a list of values is not available for the **Banner Value** field.
Description	Description of the data value. Display only.

Step 5   Review available Banner data fields

Use the Data Field Process Rules Form (APATPFD) to review the processes that can extract or load each data field. Values for the supported data fields and processes are delivered as part of the baseline product.

If you want to load or extract additional data fields to accommodate local modifications, you must add the data fields on the Data Field Names Validation Form (ATVTPFD) and APATPFD.

Add data fields on ATVTPFD

The Data Field Names Validation Form (ATVTPFD) lists all fields that can be extracted from and loaded into Banner. The displayed values are delivered as part of the baseline product and cannot be changed or deleted. If you want to load or extract additional data fields to accommodate local modifications, add the data fields to ATVTPFD.

📋 **Note**

Not all values are available for all processes.   ■

Field	Description
Field Name	Name of the data field used to identify data for Banner processes. Display only.
Description	Description of the field name. Maximum length is 60 characters.

Field	Description
Validation Table Column	Element in a validation table that Banner uses to verify the data being loaded. Maximum length is 40 characters. Optional, unless the value on the incoming data field must be validated and defined for the equivalent Banner value.

For example, Banner activity codes are stored in STVACTC_CODE. If an activity value in the data load does not match a value in STVACTC, the record appears on the error log and is not loaded.

The following data fields require validation:

ACTIVITY	MAJOR_NAMEATVINCM_CODE
ADDR_COUNTRY	MAJOR_NAME2ATVDOTT_CODE
DEGREE	MAJOR_NAME3STVMAJR_CODE
DONOR_CODE	OCCUPATION_TITLE
STVMAJR_CODE	
EMPR_COUNTRY	SP_COUNTRYSTVMAJR_CODE
EXT_RATE_SOURCE	STVACTC_CODESTVMAJR_CODE
INCOME	STVNATN_CODESTVMAJR_CODE
JOB_SICC_CODE	STVDEGC_CODESTVMAJR_CODE
MAJOR	ATVDONR_CODEATVDOTT_CODE
MAJOR2	STVNATN_CODESTVNATN_CODE
MAJOR3	ATVEXRS_CODE

The Data Translation Field Value Rules Form (APATRAN) also uses these validation elements when mapping incoming values to existing Banner values. These details determine what Banner values are available for mapping incoming values.

Field	Description
System Indicator	Code that indicates whether Banner requires this code. The value *Y* indicates that the record cannot be deleted or changed. Display only.
Activity Date	Date when the record was created or last changed. Display only.

Add Data Fields on APATPFD

The Data Field Process Rules Form (APATPFD) displays all processes that can extract or load a specific field. The displayed values are delivered as part of the baseline product and cannot be changed or deleted. If you want to load or extract additional data fields to accommodate local modifications, add the data fields to APATPFD.

Field	Description
Field Name	Name that identifies a data field in Banner. This name must already exist on the Data Field Names Validation Form (ATVTPFD). Values are delivered as part of the baseline product. They are the only ones supported for data extracts and data loads. Required. List Data Field Names (ATVTPFD)
Process	Banner process that uses the data field. Maximum length is 30 characters. There are no field validations on this value; it is a free-format field. Supported processes are APPDEXT, APPCUPD, AGPMATC, and AGPEXGF. Required.
Activity Date	Date when the record was created or last changed. Display only.
User	ID of the user who created or changed the record. Display only.

Step 6   Define the format of the data file

Use the Data Field Position Rules Form (AGATPFD) to define the format of the data file. This file definition specifies the order of fields on the extract file that Banner creates or on the load file that Banner receives.

There are two types of data file formats. Each type has a separate window for defining the file format.

- Character delimited - A special character (such as a comma) separates each field in a record. This special character is defined in the **Delimiter** field on ATVTAPE.

- Fixed length - Each field (for example, last name or e-mail address) is a predetermined, constant number of characters. A file is fixed length if the **Delimiter** field on ATVTAPE is blank.

For data loads, the third-party vendor provides the data file layout to use as the basis for defining the format on AGATPFD.

📋 **Note**

The External Gift Load Process (AGPEXGF) has additional file layout requirements. See "Load third-party gifts" on page 2-101 for more details. ∎

Key block

Information in the key block comes from the Data File Validation Form (ATVTAPE).

Field	Description
File Code	Code that identifies a particular file layout for the data extract or load. Maximum length is 10 characters. Required. List Tape Codes (ATVTAPE)
Record Number	Record number used only with the External Gift Load Process (AGPEXGF): *01* Base information for the gift *02* Detail information for the gift See "Load third-party gifts" on page 2-101 for more details.
File Process	Banner process associated with the file code. The process for the file code is defined on ATVTAPE. Display only.
File Delimiter	Character that separates each field in the data file. If this field contains a character, the file is *character delimited*. If this field is blank, the file is *fixed length*. This character is defined on ATVTAPE. Display only.

Delimited File Details window

This window is displayed if the file code entered in the key block is defined on ATVTAPE as *character delimited*. This window allows you to specify the order in which the fields appear on the extract or load and any occurrence information.

📋 **Note**

The Copy Definition option is enabled if you are defining a new file code that has no existing format details. ∎

Field	Description
Field Name	Name of a data field that appears on the data extract or data load. This name must be defined for the associated process on the Data Field Process Rules Form (APATPFD). Required. List Data Field Names (ATVTPFD) **Note:** Data files that will be loaded to Banner using Banner-delivered processes must include the `BAN_PIDM` field.
Field Number	Position on the file where the field is located. Maximum length is four digits. Required. You can be extremely flexible in your data loads. You can split large files into multiple data loads with different data layouts. If you do that, be sure the number in **Field Number** is correct for each load. For example, if the first field in the data load is the fiftieth for the overall data load, the **Field Number** for the first field on this form should be *50*.
Occurrence	Code that groups records together when they occur more than once. Default value is *1*. Maximum value is 100. Required. See "Using occurrences" on page 2-15 for more details.
Activity Date	Date when the record was created or last changed. Display only.

Fixed Length File Details window

This window is displayed if the file code in the key block was defined on ATVTAPE as *fixed length*. This window allows you to specify the order of fields in the data extract or data load, the length of each field, and any occurrence information.

📑 **Note**

> The Copy Definition option is enabled if you are defining a new file code that has no existing format details. ▪

Field	Description
Field Name	Name of a data field that appears on the data extract or data load. This name must be defined for the associated process on the Data Field Process Rules Form (APATPFD). Required.
	List Data Field Names (ATVTPFD)
	Note: Data files that will be loaded to Banner using Banner-delivered processes must include the `BAN_PIDM` field.
Start	Starting position of the data field in a file. For a data load, this information should be provided by the third-party vendor. Maximum length is four characters. Required.
	You can be extremely flexible in your data loads. You can split large files into multiple data loads with different data layouts. If you do that, be sure the number in **Start** is correct for each load. For example, if the first field in the second data load begins in position 555, the **Start** value would be *555*. The third data load could begin in position 596, etc.

Field	Description
End	Ending position of the data field in the file. For a data load, this information should be provided by the third-party vendor. Maximum length is four characters. Required.
Occurrence	Code that groups records together when they occur more than once. Default value is *1*. Maximum value is 100. **Note:** The External Gift Load Process (AGPEXGF) does not support the use of occurrences.
Activity Date	Date when the record was created or last changed. Display only.

Using occurrences

The **Occurrence** field is used to manage repeating groups of information such as multiple children or multiple types of addresses. For example, a data load can include home, business, and cell phone information. Each record would consist of the same information:

- Type code
- Area code
- Telephone number
- Extension

For a fixed format data file layout, you would specify the start and end position for each field, but use a different occurrence for each type of telephone information:

Field Name	Start	End	Occurrence	Description
PHONE_CODE	27	30	1	Type code - home phone
PHONE_AREA	31	33	1	Area code - home phone
PHONE	34	40	1	Telephone number - home phone
PHONE_EXT	41	45	1	Telephone extension - home phone
PHONE_CODE	46	49	2	Type code - business phone
PHONE_AREA	50	52	2	Area code - business phone
PHONE	53	59	2	Telephone number - business phone
PHONE_EXT	60	63	2	Telephone extension - business phone
PHONE_CODE	64	67	3	Type code - cell phone
PHONE_AREA	68	70	3	Area code - cell phone
PHONE	71	77	3	Telephone number - cell phone
PHONE_EXT	78	81	3	Telephone extension - cell phone
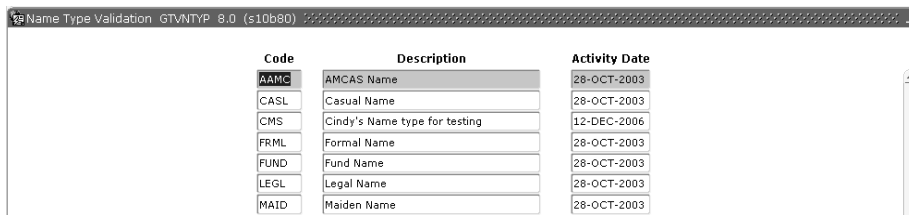
Step 7   Set up name type codes

Name type codes are used for the following:

- Names of parent companies and subsidiaries

- Cross-references

- Aliases

- Fund names

- Organization names

They are used in many different places in Banner, including the Alternate Identification window on the Advancement Identification Form (APAIDEN). Name type codes are shared with all Banner systems. You should work with the other Banner users at your institution to determine which values to add.

Use the Name Type Validation Form (GTVNTYP) to set up name type codes if they have not already been created.

Field	Description
Code	Code assigned to type of name (for example, casual name, preferred name, legal name, maiden name). Required.
Description	Description of the name type code. Required.
Activity Date	Date when the record was created or last changed. Display only.

Step 8   Set up cross reference codes

Cross reference codes identify the cross reference relationships tracked by Banner. These codes must be defined before you can set up cross references between parent companies and subsidiaries.

Use the Cross Reference Code Validation Form (ATVXREF) to set up cross reference codes if they have not already been created.

Cross Reference Code Validation ATVXREF 8.0 (s10b80)

Code	Description	Reverse	Spouse	Employer	Match	Household	Split	Hard or Soft	Activity Date
AMB	State Legislative Ambassador	STA	☐	☐	☐	☐			17-MAY-2005
APX	API Test XrefCode		☐	☐	☐	☐			22-MAR-2005
AUN	Aunt	NEE	☐	☐	☐	☐	1	S	26-JAN-2006
AWD	Alumni/ae Widow/er	SPS	☐	☐	☐	☐			15-SEP-1991
BRO	Brother	SIS	☐	☐	☐	☑	6	H	22-MAR-2005
BUS	Business Associate	BUS	☐	☐	☐	☐			08-JUL-1991
CHL	Child	PAR	☐	☐	☐	☑			28-JAN-2005
COR	Corporate Headquarters	LOC	☑	☑	☐				28-JAN-2005
COU	Cousin	COU	☐	☐	☐	☐			14-FEB-2006
CPR	Corporate Parent	SUB	☐	☐	☐	☐			16-JUN-1991
EMP	Employee	EMR	☐	☐	☐	☐	10	S	21-FEB-2005
EMR	Employer	EMP	☐	☑	☑	☐			14-FEB-2006
FAM	Family Member	FDN	☐	☐	☑	☐			14-FEB-2006
FDN	Family Foundation	FAM	☐	☐	☐	☐			08-JUL-1991
FEP	Former Employee	FER	☐	☐	☐	☐			08-JUL-1991
FER	Former Employer	FEP	☐	☐	☐	☐			08-JUL-1991
HUS	Husband	WIF	☑	☐	☐	☑			28-JAN-2005
LOC	Local Corporate Office	COR	☐	☐	☐	☐			28-JAN-2005
NEE	Niece/Nephew	UNC	☐	☐	☐	☐			08-JUL-1991
PAR	Parent	CHL	☐	☐	☐	☑			28-JAN-2005
RMT	Roommate	RMT	☐	☐	☐	☑			03-JUL-2006
SIB	Sibling	SIB	☐	☐	☐	☐			01-JUN-1990

Field	Description
Code	Code assigned to the cross reference relationship. Required.
Description	Description of the cross reference code.
Reverse	Cross reference code to which the code is mapped. For example, if **Code** is *HUS* (husband), **Reverse** is *WIF* (wife).

Reverse must contain a cross reference code that exists on this validation form. This second cross reference code defines the reverse cross reference relationship. Banner uses the reverse relationship to automatically create the second half of a cross reference relationship when you set up the first half on the Cross Reference Form (APAXREF). A cross reference can be its own reverse. |
| Spouse | Check box that identifies a spouse relationship. The Advancement Individual Information Form (APACONS) and the Cross Reference Code Validation Form (ATVXREF) use this indicator to identify the second half of a spouse relationship and to create a corresponding spouse record. The Expected Matching Gift Allocations Report (AXPMATG) and the Matching Gift Allocations Report (AGPMATG) check this indicator to determine whether the spouse of the donor works for a matching gift company. |
| Employer | Check box that identifies employer/employee relationships. At least one of the codes defining an employer/employee relationship must have this check box selected. The Employment History Form (APAEHIS) and the Cross Reference Form (APAXREF) use this indicator to identify and establish the second half of a cross reference and to create a corresponding employment history record, if necessary. |

Field	Description
Match	Check box that identifies employers who match gifts.
Household	Check box that indicates whether the relationship is part of the same household. For example, you would probably consider spouses to be in the same household, but not a person and corporate headquarters.
	If the **Household** check box is selected, Banner automatically selects the **Household** check box for the reverse value. For example, if you select **Household** for *Husband*, then **Household** is automatically selected for *Wife*. This ensures that forms and processes behave consistently.
Split	Priority of the rule defined on the Institution Split Rules Form (AGASPRL) that automatically splits pledge and gift credit among cross references. Display only.
Hard or Soft	Type of credit given when a pledge or gift credit is automatically split among cross references:

	H	Hard
	S	Soft
	blank	No default rule defined on AGASPRL for this cross reference code.

Display only.

Field	Description
Activity Date	Date when the record was created or last changed. Display only.

Step 9 Set up e-mail address type codes

Examples of e-mail address types include business, personal, and school. They are used in many different places in Banner. Because they are shared with other Banner systems, you should work with the other Banner users at your institution to determine which values to add.

Use the E-mail Address Type Validation Form (GTVEMAL) to add e-mail address type codes.

Code	Description	Web	URL	Activity Date
AOL	America On-Line	☑	☐	03-MAY-2004
API	API_TESTS	☐	☐	26-FEB-2004
FAEM	Financial Aid Email	☑	☐	12-AUG-2004
HOME	Home Email	☑	☐	09-SEP-2005
INST	Institutionally Assigned	☑	☐	03-MAY-2004
LONG	Long E-mail address description 01234567890123456789012345 67	☑	☐	29-OCT-2004
MA	Test email integration	☑	☐	29-AUG-2005
P1	Primary one	☑	☐	21-JUL-2005
URL	URL	☑	☑	12-JUL-2004
WORK	Work Email	☑	☐	24-NOV-2004
WWWW	Test email	☑	☐	09-SEP-2005
YAHO	Yahoo email	☑	☐	09-SEP-2005

Field	Description
Code	Code assigned to the e-mail type. Once created, an e-mail address type code cannot be changed. Required.
Description	Description of the e-mail address type code. The description can be updated any time. Required.
Web	Check box that indicates whether the e-mail address type is a valid address type on the Web. Optional.

selected	E-mail address type is included in LOVs in the Banner Self-Service products as a valid address type.
cleared	E-mail address type is not included in LOVs in the Banner Self-Service products as a valid address type.

This indicator has no influence on the E-mail Address Form (GOAEMAL). You can use GOAEMAL to determine which e-mail addresses *for a particular person* appear on the Web. For example, you might want a person's university address to appear, but not the home address.

Field	Description
URL	Check box that indicates the e-mail address type is a URL. Optional.
Activity Date	Date when the record was created or last changed. Display only.

Extract directory data

The Directory Data Extract Process (APPDEXT) extracts alumni information from Banner for third-party vendors that produce directories. The vendors can send surveys to your alumni, receive the results, and send you a file with the updated data. You can then use the External Ratings and Directory Load Process (APPCUPD) (see "Load external ratings and directory information" on page 2-65) to load this file into Banner.

Before extracting data, you must perform the setup steps described in <u>"Set up a data load or a data extract" on page 2-1</u>.

Data that can be extracted

APPDEXT can extract the following data from Banner. The ATVTPFD field names are used to define the file layout on the Data Field Position Rules Form (AGATPFD).

ATVTPFD Field Name	Banner Data Field	Description
ADDR_ACTIVITY_DATE	SPRADDR_ACTIVITY_DATE	Date of last address update
ADDR_CITY	SPRADDR_CITY	City for specified address type code. Address must be active.
ADDR_CODE	SPRADDR_ATYP_CODE	Address type code
ADDR_HOUSE_NUMBER	SPRADDR_HOUSE_NUMBER	Unique number assigned to each building on a street or in an area and used as part of the postal address in some countries
ADDR_PHONE	SPRTELE_PHONE_NUMBER	Phone number for telephone type code specified as a parameter. Telephone number must be active.
ADDR_PHONE_ALL	SPRTELE_PHONE_ALL	Phone area code, number, and extension for telephone type code specified as a parameter. Telephone number must be active.
ADDR_PHONE_AREA	SPRTELE_PHONE_AREA	Phone area code for telephone type code specified as a parameter. Telephone number must be active.
ADDR_PHONE_COUNTRY_CODE	SPRTELE_CTRY_CODE_PHONE	Code that designates the region and country of the telephone number

ATVTPFD Field Name	Banner Data Field	Description
ADDR_PHONE_EXT	SPRTELE_PHONE_EXT	Phone number extension for telephone type code specified as a parameter. Telephone number must be active.
ADDR_STATE	SPRADDR_STAT_CODE	State for specified address type code. Address must be active.
ADDR_STREET1	SPRADDR_STREET_LINE1	First address line for specified address type code. Address must be active.
ADDR_STREET2	SPRADDR_STREET_LINE2	Second address line for specified address type code. Address must be active.
ADDR_STREET3	SPRADDR_STREET_LINE3	Third address line for specified address type code. Address must be active.
ADDR_STREET4	SPRADDR_STREET_LINE4	Fourth address line for specified address type code. Address must be active.
ADDR_ZIP	SPRADDR_ZIP	ZIP/postal code for the specified address type code. The address must be active. These are the first five digits of SPRADDR_ZIP.
ADDR_ZIP4	SPRADDR_ZIP	ZIP/postal code for specified address type code. Address must be active. These are the last four digits of SPRADDR_ZIP.
ADDR_ZIPC	SPRADDR_ZIP	ZIP/postal code for specified address type code. Address must be active. This is the complete value in SPRADDR_ZIP.
BAN_ID	SPRIDEN_ID	Banner ID (unique identifier)
BAN_PIDM	SPRIDEN_PIDM	Banner PIDM (unique identifier)

ATVTPFD Field Name	Banner Data Field	Description
BIRTH_DATE	SPBPERS_BIRTH_DATE	Birth date
CHILD_NAME_FIRST	APRCHLD_FIRST_NAME	Child's first name (repeating value if a person has more than one child)
CHILD_NAME_LAST	APRCHLD_LAST_NAME	Child's last name (repeating value if a person has more than one child)
CHILD_NAME_MIDDLE	APRCHLD_MI	Child's middle name (repeating value if a person has more than one child)
CHILD_SURNAME_ PREFIX	APRCHLD_SURNAME_PREFIX	Child's last name prefix (repeating value if a person has more than one child)
DECEASED_IND	SPBPERS_DEAD_IND	Deceased indicator
DEGREE	APRADEG_DEGC_CODE	Degree code (repeating value if a person has more than one degree code)
DEGREE_YEAR	APRADEG_ACYR_CODE	Award year (repeating value if a person has more than one award year)
DONOR_CODE	APRCATG_DONR_CODE	Donor category (identifies non-alumni, etc.)
EMAIL	GOREMAL_EMAIL_ADDRESS	E-mail address for e-mail address type code specified as a parameter. E-mail address must be the primary one (primary indicator must be selected).
EMAIL_CODE	GOREMAL_EMAL_CODE	E-mail type code that corresponds to the e-mail address.

ATVTPFD Field Name	Banner Data Field	Description
EMPR_NAME	APREHIS_EMPR_NAME	Employer's name where the primary indicator is selected and the to date (`APREHIS_TO_DATE`) is null. If a selected record has a Banner PIDM, the name is selected from the SPRIDEN table. Otherwise, the name is selected from the APREHIS table.
EMPR_PIDM	APREHIS_EMPR_PIDM	Employer's PIDM where the primary indicator is selected and the to date (`APREHIS_TO_DATE`) is null.

The following employer address and phone information is selected by comparing these values:

- Address type and sequence number on APREHIS associated with the record selected

- Address type and sequence number on SPRADDR and SPRTELE for the employee

The primary employer indicator must be selected. The telephone number must be active.

ATVTPFD Field Name	Banner Data Field	Description
EMPR_ADDR_ACT_DATE	SPRADDR_ACTIVITY_DATE	Date of last employer address update
EMPR_ADDR_CODE	SPRADDR_ATYP_CODE	Employer's address type code
EMPR_HOUSE_NUMBER	SPRADDR_HOUSE_NUMBER	Unique number assigned to employer's building on a street or in an area and used as part of the postal address in some countries
EMPR_STREET1	SPRADDR_STREET_LINE1	First line of employer's mailing address
EMPR_STREET2	SPRADDR_STREET_LINE2	Second line of employer's mailing address
EMPR_STREET3	SPRADDR_STREET_LINE3	Third line of employer's mailing address

ATVTPFD Field Name	Banner Data Field	Description
EMPR_STREET4	SPRADDR_STREET_LINE4	Fourth line of employer's mailing address
EMPR_CITY	SPRADDR_CITY	Employer's city
EMPR_STATE	SPRADDR_STAT_CODE	Employer's state
EMPR_ZIP	SPRADDR_ZIP	Employer's ZIP/postal code. These are the first five digits of SPRADDR_ZIP.
EMPR_ZIP4	SPRADDR_ZIP	Additional four digits for ZIP/postal code. These are the last four digits of SPRADDR_ZIP.
EMPR_AREA_CODE	SPRTELE_PHONE_AREA	Employer's phone area code for the telephone type code specified as a parameter
EMPR_PHONE	SPRTELE_PHONE_NUMBER	Employer's phone number for the telephone type code specified as a parameter
EMPR_PHONE_EXT	SPRTELE_PHONE_EXT	Employer's phone extension for the telephone type code specified as a parameter
EMPR_PHONE_ALL	SPRTELE_PHONE_ALL	Employer's area code, number, and extension for the telephone type code specified as a parameter
EMPR_PHONE_COUNTRY_CODE	SPRTELE_CTRY_CODE_PHONE	Code that designates the region and country of the employer's telephone number
EMPR_EMAIL	GOREMAL_EMAIL_ADDRESS	Employer's e-mail address for the e-mail address type code specified as a parameter. E-mail address must be the primary one (primary indicator must be selected).
EMPR_EMAIL_CODE	GOREMAL_EMAL_CODE	Employer's e-mail type code

ATVTPFD Field Name	Banner Data Field	Description
EXCL_CODE	APREXCL_EXCL_CODE	Exclusions (including do not mail/phone, do not include, do not solicit)
EXCL_END_DATE	APREXCL_END_DATE	Date when the exclusion ends
EXCL_REASON	APREXCL_REASON	Reason that the exclusion applies to the ID
EXCL_START_DATE	APREXCL_DATE	Date when the exclusion starts
INST_CODE	APRADEG_SBGI_CODE	Institutions attended code (including current institution)
INST_DESC	STVSBGI_DESC	Institutions attended description (including current institution)
JOB_CATEGORY	APREHIS_JOBC_CODE	Occupation/career code (job category)
JOB_SICC_CODE	APREHIS_SICC_CODE	Occupation/career code (SIC code)
JOB_TITLE	APREHIS_EMPL_POSITION	Employee's job title
LOST_INDICATOR	LOST_INDICATOR	Indicator that all mailing address records are inactive
MAIDEN_NAME_FIRST	SPRIDEN_FIRST_NAME	Maiden first name (where the name type on GTVNTYP has the value *MAIDEN*)
MAIDEN_NAME_LAST	SPRIDEN_LAST_NAME or APBCONS_MAIDEN_LAST_NAME	Maiden last name (where the name type on the Name Type Validation Form (GTVNTYP) has the value *MAIDEN*) or the maiden name information from the APBCONS table if a record exists
MAIDEN_NAME_MIDDLE	SPRIDEN_MI	Maiden middle name (where the name type on GTVNTYP has the value *MAIDEN*)
MAIDEN_NAME_SUFFIX	SPBPERS_NAME_SUFFIX	Maiden suffix (where the name type on GTVNTYP has the value *MAIDEN*)

ATVTPFD Field Name	Banner Data Field	Description
MAJOR	APRAMAJ_MAJR_CODE	Major code (repeating value if a person has more than one major code)
NAME_FIRST	SPRIDEN_FIRST_NAME	First name
NAME_LAST	SPRIDEN_LAST_NAME	Last name
NAME_MIDDLE	SPRIDEN_MI	Middle name
NAME_PREFIX	SPBPERS_NAME_PREFIX	Name prefix
NAME_SUFFIX	SPBPERS_NAME_SUFFIX	Name suffix
NAME_SURNAME_PREFIX	SPRIDEN_SURNAME_PREFIX	Last name prefix
PREF_ADDRESS_CODE	APBCONS_ATYP_CODE_PREF	Preferred address code
PREFERRED_CLASS	APBCONS_PREF_CLAS	Preferred class (repeating value if a person has more than one preferred class)
SCHOOL_CODE	APRADEG_COLL_CODE	School/college code (repeating value if a person has more than one school/college code)
SP_NAME_FIRST	APRCSPS_FIRST_NAME	Spouse's first name
SP_NAME_LAST	APRCSPS_LAST_NAME	Spouse's last name
SP_NAME_MIDDLE	APRCSPS_MI_NAME	Spouse's middle name
SP_SURNAME_PREFIX	APRCSPS_SURNAME_PREFIX	Spouse's last name prefix

Steps to extract data from Banner

Use the following steps to extract data from Banner:

- Step 1, "Identify the IDs to be extracted"
- Step 2, "Run the Directory Data Extract Process (APPDEXT)"
- Step 3, "Review the output"

The following sections provide detailed instructions for each step.

Step 1   Identify the IDs to be extracted

You must create a population selection or a manual data file to identify the IDs to be extracted:

- You can build a population selection to identify the IDs that you want to extract from the Banner database. You can also copy and change an existing population selection. A population selection is a set of rules used to select IDs from the Banner database for reports, processes, and letters. A population selection is uniquely identified by an application, selection ID, and creator ID. For more information, refer to the "Processing" chapter of the *Banner General User Guide*.

- You can create a manual data file of IDs that you want to extract from the Banner database. The Banner IDs to use for the record selection must be stored in the first field of the data file.

Step 2   Run the Directory Data Extract Process (APPDEXT)

The Directory Data Extract Process (APPDEXT) extracts information from Banner. The Data Field Position Rules Form (AGATPFD) defines which fields are extracted and the order in which the data elements appear on the output file. The output file can be fixed length or character delimited.

APPDEXT is run from the Process Submission Controls Form (GJAPCTL) with the following parameters:

Parameter		Description
01	File Code	File code for the appropriate data source. Select List or the **Values** pull-down arrow to see valid values from the Data File Validation Form (ATVTAPE). Required.
02	Data File Name	Name of the file you are creating. Optional.
03	Application Code	Application associated with a population selection. (A population selection is a set of rules used to select Banner IDs from the database. A population selection is uniquely identified by an application code, selection ID, and creator ID combination.) Required if you are using a population selection to identify the Banner IDs to be extracted.
04	Selection ID	Population selection ID. The population selection must already exist. Required if you entered an application code.
05	Creator ID	User ID of the person who created the population selection. Required if you entered an application code.

Parameter		Description
06	User ID	User ID of the person who is running the population selection. Required if you entered an application code.
07	Path of Manual Data File	Complete file location of the manual data file that contains the Banner IDs to be extracted. Required if you are using a data file, rather than a population selection, to identify the IDs to be extracted.
08	Manual ID File	Name of the manual data file that contains the Banner IDs to be extracted. A unique identifier must be the first nine digits. Required if you are using a data file, rather than a population selection, to identify the IDs to be extracted.
		Note: APPDEXT only runs properly if this file contains valid Banner IDs.
09	Address Type	Type of address (for example, billing, mailing) for record selection of address information, if you included address in the extract definition. Select List or the **Values** pull-down arrow to see valid values from the Address Type Validation Form (STVATYP). Optional.
		Note: This is a repeating parameter. You can specify more than one type of address. Be sure to define each occurrence. For more information about occurrences, refer to "Using occurrences" on page 2-15.
10	Phone Type	Type of telephone number (for example, business) for record selection of telephone information, if you included telephone in the extract definition. Select List or the **Values** pull-down arrow to see valid values from the Telephone Type Validation Form (STVTELE). Optional.
		Note: This is a repeating parameter. You can specify more than one type of telephone number. Be sure to define each occurrence. For more information about occurrences, refer to "Using occurrences" on page 2-15.

Parameter		Description
11	E-mail Type	Type of e-mail address (for example, home) for record selection of e-mail information, if you included e-mail address in the extract definition. Select List or the **Values** pull-down arrow to see valid values from the E-mail Address Type Validation Form (GTVEMAL). Optional.
		Note: This is a repeating parameter. You can specify more than one type of e-mail address. Be sure to define each occurrence. For more information about occurrences, refer to <u>"Using occurrences" on page 2-15</u>.
12	Maiden Code	Code that represents the maiden name (as defined on the Name Type Validation Form (GTVNTYP), or on ABPCONS_MAIDEN_LAST_NAME if your institution doesn't use GTVNTYP), if you included maiden names in the extract definition. Optional.

For more information about APPDEXT, refer to the *Banner Advancement User Guide*.

Step 3   Review the output

Review the file produced by APPDEXT and see if it appears to be correct. You can also look at the output report. Contents of the report depend on whether the file is fixed length or character delimited:

Fixed Length File

AGRTPFD_TFPD_CODE	Data file field name
ATVTPFD_DESC	Data field names description
AGRTPFD_START_POS	Start position of data file field
AGRTPFD_END_POS	End position of data file field

Character Delimited File

AGRFPFD_TPFD_CODE	Data file field name
ATVTPFD_DESC	Data field names description
AGRTPFD_START_POS	Field number
AGRTPFD_OCC	Number of times the data repeats (occurrence)

If there are problems with the file, make your changes and run APPDEXT again, as described in step 2.

Many problems can be traced to an incorrect file definition. Check the file definition on the Data Field Position Rules Form (AGATPFD). Make sure all fields are defined and that you are using occurrences correctly. For more information, refer to "Set up a data load or a data extract" on page 2-1.

Make sure that the job submission parameters are provided as needed, and that multiple occurrences are noted and included if repeating data is included in the file definition.

Load matching gift data

Employers can agree to match certain gifts under certain circumstances up to certain amounts. This information can be stored in Banner. You should load the matching gift policies and procedures of various employers into Banner on a regular basis so you can determine how much money your institution can expect to receive from these employers.

Your institution can subscribe to one or both of the following databases that provide the policies and procedures:

- Higher Education Publications Company (HEP) GiftPlus database

- Council for Advancement and Support of Education (CASE) National Clearinghouse for Matching Gift Information database

Third-party vendors also provide matching gift information. The file returned by a vendor includes the special matching gift ID that will be loaded into Banner with the rest of the data. The vendor should also send you information from the GiftPlus or National Clearinghouse for Matching Gift Information database.

Before loading data, you must perform the setup steps described in "Set up a data load or a data extract" on page 2-1.

The Matching Gift Data Load Report (AGPMATC) loads matching gift data to Banner. After the data is loaded into Banner, you can see the matching gift data on Banner forms:

- If a company matches gifts, it is noted on the Matching Gifts window of the Advancement Organization Header Form (AOAORGN).

- If a percentage is included in the **Organization ID Matching Gift Percentage** field on AOAORGN, the matching gift company ID and name are displayed on the Employment History Form (APAEHIS) for the employee (

- Matching gift information is displayed on the Matching Gift Information Form (AOAMTCH).

Data that can be loaded

AGPMATC can load the following data into Banner. The various third-party vendors work with a subset of these data fields.

These fields are delivered as part of the baseline product and are the only fields that can be inserted into the database. The ATVTPFD field names are used to define the file layout on the Data Field Position Rules Form (AGATPFD).

ATVTPFD Field Name	Description
ADD_LINE1	Address street line 1
ADD_LINE2	Address street line 2
ALIAS	Alias or abbreviation of name from GTVNTYP
ANN_EMP	Total annual maximum matching gift amount per employee
ATITLE	Administrative title
BAN_NAME	Banner organization name (this does not replace the key block version of the name)
BAN_PIDM	Banner PIDM
CITY	City
COMMENT_BLOCK1	Comments block 1, displayed on the Comments window on AOAMTCH
COMMENT_BLOCK2	Comments block 2, displayed on the Comments window on AOAMTCH
COMMENT_BLOCK3	Comments block 3, displayed on the Comments window on AOAMTCH
COMMENT_BLOCK4	Comments block 4, displayed on the Comments window on AOAMTCH
COUNTRY	Country
EMAIL	E-mail address on APAEMAL
EXT	Extension for telephone
FISCALYR	Fiscal year

ATVTPFD Field Name	Description
FNAME	First name of contact on AOAORGN
FUNDNAME	Matching gift or foundation name from AGPMATC parameter 04 (Name Type for Fund). AGPMATC creates a SPRIDEN record with an alternate name of the type specified in the parameter.
HOMEPAGE	URL of the home page on APAEMAL
HOUSE_NUMBER	Unique number assigned to each building on a street or in an area and used as part of the postal address in some countries
LNAME	Last name of contact on AOAORGN
MAXIMUM	Maximum matching gift amount on AOAORGN
MG_ACKNOWLEDGE_GIFT_RECEIPT	Indicator that a gift receipt acknowledgement is required for every matching gift on AOAORGN
MG_ACKNOWLEDGE_LETTER	Indicator that an acknowledgement letter is required for every matching gift on AOAORGN
MG_AFFILIATION_ALUMNI	Code that specifies if the employee must be an alumnus for the advancement organization to match gifts. This must be a valid code on ATVMAST, and it is displayed on the Alumni Status block under the Eligibility Requirements window on AOAMTCH.
MG_AFFILIATION_ATTEND	Code that specifies if the employee's spouse or children must attend the institution for the advancement organization to match gifts to that institution. This must be a valid code on ATVMPUR, and it is displayed on the Related Purpose block under the Eligibility Requirements window on AOAMTCH.
MG_AFFILIATION_GRADUATE	Code that specifies if the employee must be a graduate of an institution for the advancement organization to match gifts to that institution. This must be a valid code on ATVMAST, and it is displayed on the Alumni Status block under the Eligibility Requirements window on AOAMTCH.

ATVTPFD Field Name	Description
MG_AFFILIATION_MEMBER	Code that specifies if the employee must be a member for the advancement organization to match gifts to that institution. This must be a valid code on ATVMAST, and it is displayed on the Alumni Status block under the Eligibility Requirements window on AOAMTCH.
MG_AFFILIATION_PATIENT	Code that specifies if the employee must have received patient care for the advancement organization to match gifts to that institution. This must be a valid code on ATVMAST, and it is displayed on the Alumni Status block under the Eligibility Requirements window on AOAMTCH.
MG_ATHLETICS_BUILDING	Code that specifies if the advancement organization matches gifts made to building funds for an athletics program. This must be a valid code on ATVMPUR, and it is displayed on the Related Purpose block under the Eligibility Requirements window on AOAMTCH.
MG_ATHLETICS_PROGRAM	Code that specifies if the advancement organization matches gifts made to an athletics program. This must be a valid code on ATVMPUR, and it is displayed on the Related Purpose block under the Eligibility Requirements window on AOAMTCH.
MG_ATHLETICS_SCHOLAR	Code that specifies if the advancement organization matches gifts made to scholarships for an athletics program. This must be a valid code on ATVMPUR, and it is displayed on the Related Purpose block under the Eligibility Requirements window on AOAMTCH.
MG_DIST_ANNUALLY	Total annual distribution, displayed in the **Organization Maximum Per Institution Per Year** field on the Matching Gifts window on AOAORGN.
MG_DIST_CONTINUOUS	Indicator that specifies if the advancement organization continually distributes funds when a form is provided. Displayed on the Matching Gifts window on AOAORGN

ATVTPFD Field Name	Description
MG_DIST_MONTHLY	Total monthly distribution, displayed on the Matching Gifts window on AOAORGN
MG_DIST_QUARTERLY	Total quarterly distribution, displayed on the Matching Gifts window on AOAORGN
MG_DIST_SEMI_ANNUALLY	Total semi-annual distribution, displayed on the Matching Gifts window on AOAORGN
MG_ELIGIBILITY_FLAG_ALL	Code that specifies if gifts from all employees are matched. This must be a valid code on ATVMERQ, and it is displayed on the Employment Status block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_FLAG_ALL_FT	Code that specifies if gifts from full-time employees are matched. This must be a valid code on ATVMERQ, and it is displayed on the Employment Status block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_FLAG_ALL_FT_SALARIED	Code that specifies if gifts from salaried employees are matched. This must be a valid code on ATVMERQ, and it is displayed on the Employment Status block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_FLAG_ALL_PT	Code that specifies if gifts from part-time employees are matched. This must be a valid code on ATVMERQ, and it is displayed on the Employment Status block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_FLAG_ELIG_SPOUSE	Code that specifies if gifts from the spouses of employees are matched. This must be a valid code on ATVMERQ, and it is displayed on the Employment Status block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_FLAG_RETIRED	Code that specifies if gifts from retired employees are matched. This must be a valid code on ATVMERQ, and it is displayed on the Employment Status block under the Eligibility Requirements window on AOAMTCH.

ATVTPFD Field Name	Description
MG_ELIGIBILITY_INST_4YR	Code that specifies if gifts to four-year institutions are matched. This must be a valid code on ATVMEDU, and it is displayed on the Levels block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_INST_COMM_JR	Code that specifies if gifts to community colleges or junior colleges are matched. This must be a valid code on ATVMEDU, and it is displayed on the Levels block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_INST_ELEM_SCHOOL	Code that specifies if gifts to elementary schools are matched. This must be a valid code on ATVMEDU, and it is displayed on the Levels block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_INST_GRADPROF	Code that specifies if gifts to graduate or professional schools are matched. This must be a valid code on ATVMEDU, and it is displayed on the Levels block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_INST_SEC_SCHOOL	Code that specifies if gifts to secondary schools are matched. This must be a valid code on ATVMEDU, and it is displayed on the Levels block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_INST_SEMINARY	Code that specifies if gifts to seminaries are matched. This must be a valid code on ATVMEDU, and it is displayed on the Levels block under the Eligibility Requirements window on AOAMTCH.
MG_ELIGIBILITY_INST_TECH_SCHOOL	Code that specifies if gifts to technical schools are matched. This must be a valid code on ATVMEDU, and it is displayed on the Levels block under the Eligibility Requirements window on AOAMTCH.
MG_ID	HEP-CASE ID on AOAORGN

ATVTPFD Field Name	Description
MG_NONPROFIT_CHARITIES	Code that specifies if gifts to charities are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_NONPROFIT_CULTURAL	Code that specifies if gifts to cultural institutions are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_NONPROFIT_ENV_CONSERV	Code that specifies if gifts to environmental or conservation organizations are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_NONPROFIT_FRAT_SOR	Code that specifies if gifts to fraternity or sorority educational foundations are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_NONPROFIT_HEALTHCARE	Code that specifies if gifts to non-profit health care organizations are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_NONPROFIT_MUSEUM	Code that specifies if gifts to museums are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.

ATVTPFD Field Name	Description
MG_NONPROFIT_PERF_ARTS	Code that specifies if gifts to performing arts organizations are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_NONPROFIT_RADIO_TV	Code that specifies if gifts to public radio and TV stations are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_NONPROFIT_RELIGIOUS	Code that specifies if gifts to religious organizations are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_NONPROFIT_SOCIALSERVICE	Code that specifies if gifts to social service organizations are matched. This must be a valid code on ATVMNED, and it is displayed on the Non-Educational Institutions block under the Associations and Institutions window on AOAMTCH.
MG_PROCEDURE_DONOR_CHECK	Code that indicates if the donor must provide a check and a form to the advancement organization for it to match the donor's gifts. This must be a valid code on ATVMPRO, and it is displayed on the Procedures window on AOAMTCH.
MG_PROCEDURE_DONOR_PHONE	Code that indicates if the donor must contact the advancement organization by telephone for it to match the donor's gifts. This must be a valid code on ATVMPRO, and it is displayed on the Procedures window on AOAMTCH.
MG_PROCEDURE_INST_FORM	Code that indicates if the institution receiving the matching gift must file a form with the advancement organization after the institution receives the gift. This must be a valid code on ATVMPRO, and it is displayed on the Procedures window on AOAMTCH.

ATVTPFD Field Name	Description
MI	Middle initial of the contact person at the company
MINIMUM	Minimum matching gift amount on AOAORGN
ORGNAME	HEP-CASE parent company name on AOAORGN
PHONE	Telephone number of the contact person at the company
PHONE_COUNTRY_CODE	Code that designates the region and country of the telephone number of the contact person at the company
PTITLE	Personal title of the contact person at the company
RATIO	Matching gift ratio on AOAORGN
SNAME_PREFIX	Prefix that precedes last name of the contact person at the company
STATE	State of the contact person at the company
SUFFIX	Name suffix of the contact person at the company
ZIP4	Last four digits of the ZIP/postal code of the contact person at the company
ZIP5	First five digits of the ZIP/postal code of the contact person at the company
ZIPC	Complete ZIP/postal code of the contact person at the company

The following layout for the HEP data file is provided for your convenience. It contains all of the fields listed above, except for COUNTRY, EMAIL, and PHONE_COUNTRY_CODE.

HEP Field Name	Banner Field Name
ALUMID	BAN_PIDM
CONAME	BAN_NAME
ID	MG_ID
ORGNAME	ORGNAME
AKA	ALIAS

HEP Field Name	Banner Field Name
FUNDNAME	FUNDNAME
PTITLE	PTITLE
FNAME	FNAME
MI	MI
LNAME	LNAME
SUFFIX	SUFFIX
ATITLE	ATITLE
ADLINE1	ADD_LINE1
ADLINE2	ADD_LINE2
CITY	CITY
STATE	STATE
ZIP5	ZIP5
ZIP4	ZIP4
PHONE	PHONE
EXT	EXT
MINIMUM	MINIMUM
MAXIMUM	MAXIMUM
ANNEMP	ANN_EMP
RATIO	RATIO
FISCALYR	FISCALYR
EL01	MG_ELIGIBILITY_FLAG_ALL
EL02	MG_ELIGIBILITY_FLAG_ALL_FT
EL03	MG_ELIGIBILTY_FLAG_ALL_FT_SALARIED
EL04	MG_ELIGIBILITY_FLAG_ALL_PT
EL05	MG_ELIGIBILITY_FLAG_RETIRED
EL06	MG_ELIGIBILITY_FLAG_ELIG_SPOUSE
EE01	MG_ELIGIBILITY_INST_4YR
EE02	MG_ELIGIBILITY_INST_GRADPROF
EE03	MG_ELIGIBILITY_INST_COMM_JR
EE04	MG_ELIGIBILITY_INST_SEMINARY
EE05	MG_ELIGIBILITY_INST_SEC_SCHOOL
EE06	MG_ELIGIBILITY_INST_ELEM_SCHOOL
EE07	MG_ELIGIBILITY_INST_TECH_SCHOOL
PR01	MG_PR0CEDURE_DONOR_CHECK
PR02	MG_PR0CEDURE_INST_FORM
PR03	MG_ACKNOWLEDGE_GIFT_RECEIPT
PR04	MG_ACKNOWLEDGE_LETTER
PR05	MG_PR0CEDURE_DONOR_PHONE
AT01	MG_ATHLETICS_PROGRAM
AT02	MG_ATHLETICS_SCHOLAR

HEP Field Name	Banner Field Name
AT03	`MG_ATHLETICS_BUILDING`
AF01	`MG_AFFILIATION_ALUMNI`
AF02	`MG_AFFILIATION_GRADUATE`
AF03	`MG_AFFILIATION_ATTEND`
AF04	`MG_AFFILIATION_MEMBER`
AF05	`MG_AFFILIATION_PATIENT`
OT01	`MG_NONPROFIT_HEALTHCARE`
OT02	`MG_NONPROFIT_MUSEUM`
OT03	`MG_NONPROFIT_SOCIALSERVICE`
OT04	`MG_NONPROFIT_PERF_ARTS`
OT05	`MG_NONPROFIT_RADIO_TV`
OT06	`MG_NONPROFIT_RELIGIOUS`
OT07	`MG_NONPROFIT_ENV_CONSERV`
OT08	`MG_NONPROFIT_CULTURAL`
OT09	`MG_NONPROFIT_CHARITIES`
OT10	`MG_NONPROFIT_FRAT_SOR`
DS01	`MG_DIST_CONTINUOUS`
DS02	`MG_DIST_MONTHLY`
DS03	`MG_DIST_QUARTERLY`
DS04	`MG_DIST_ANNUALLY`
DS05	`MG_DIST_SEMI_ANNUALLY`
COMMENT1	`COMMENT_BLOCK1`
COMMENT2	`COMMENT_BLOCK2`
COMMENT3	`COMMENT_BLOCK3`
COMMENT4	`COMMENT_BLOCK4`

Steps

Use the following steps to load matching gift data to Banner:

- Step 1, "Create the extract file"

- Step 2, "Review contact type codes"

- Step 3, "Copy the returned data file to an appropriate directory"

- Step 4, "Verify the file definitions and input data"

- Step 5, "Run the MG Data Load Report (AGPMATC) in report mode"

- Step 6, "Review the output reports"

- Step 7, "Run the MG Data Load Report (AGPMATC) in update mode"

- Step 8, "(Optional) Load and link subsidiary organizations"

The following sections provide detailed instructions for each step.

Step 1 Create the extract file

Run the MG Data Extract Process (`agpexmg.sql`) to extract organization records and create a fixed length output file of the advancement organizations with which your institution interacts. The first data element in the output file is a unique number (PIDM) that identifies each organization to Banner. The organization name is the second data element. It also extracts any alternate names, nicknames, acronyms, or previous names (the change indicator on the SPRIDEN table is null or *N*).

If there is no PIDM for an employer record, the field is blank in the data file. This record requires special processing when the file is returned. It cannot be loaded into Banner via the automatic load process without a PIDM.

Assign a name to the output file when you run the script. You can name the file `MGEXTxxxxxx.dat`, where *xxxxx* is the date when the script is run in MMDDYY format (for example, `MGEXT071308.dat`). This enables you to maintain historical records, if necessary.

Data on the extract file comes from the SPRIDEN and APREHIS tables:

- The process looks for `SPRIDEN_PIDM` and `SPRIDEN_LAST_NAME` (where the non-person indicator is *Y*, indicating that the PIDM belongs to an organization). It includes all those records on the file.

- If the process doesn't find `SPRIDEN_PIDM`, it looks for `APREHIS_PIDM` and `APREHIS_EMPR_NAME`. It checks to see if there are any duplicates (where `APREHIS_EMPR_NAME` is the same as `SPRIDEN_LAST_NAME`); it does not include those records on the file.

This is the file format:

```
PIDM      NUMBER(8)
NAME      CHARACTER(60)
```
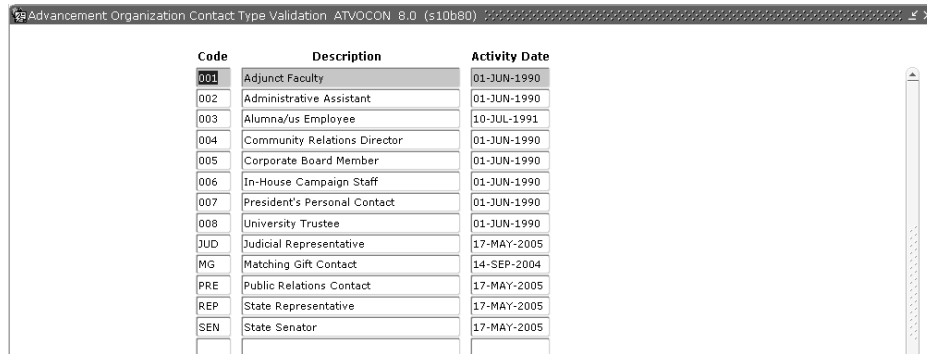
This is an example of data on the file:

```
11111   Test Corporation
```

After the file is created, send it to HEP, CASE, or another vendor. The vendor adds matching gift data for each organization to the file and returns it to you. The PIDM must remain on this file so Banner can load the correct data for each organization.

Step 2   Review contact type codes

The Advancement Organization Contact Type Validation Form (ATVOCON) contains the valid Banner contact type codes. Make sure that any codes included on the file you receive from the vendor exist on this form.

Code	Description	Activity Date
001	Adjunct Faculty	01-JUN-1990
002	Administrative Assistant	01-JUN-1990
003	Alumna/us Employee	10-JUL-1991
004	Community Relations Director	01-JUN-1990
005	Corporate Board Member	01-JUN-1990
006	In-House Campaign Staff	01-JUN-1990
007	President's Personal Contact	01-JUN-1990
008	University Trustee	01-JUN-1990
JUD	Judicial Representative	17-MAY-2005
MG	Matching Gift Contact	14-SEP-2004
PRE	Public Relations Contact	17-MAY-2005
REP	State Representative	17-MAY-2005
SEN	State Senator	17-MAY-2005

Field	Description
Code	Code representing the type of contact for the advancement organization, up to three characters in length. Required.
Description	Description of the code, up to 30 characters in length. Required.
Activity Date	Date when the record was created or last updated. Display only.

These codes are assigned to secondary contacts for an organization on the Advancement Organization Header Form (AOAORGN).

Step 3   Copy the returned data file to an appropriate directory

Copy the returned file to a directory where Banner can access it. Later, when you run the Matching Gift Company Data Load Process (AGPMATC), you must specify both the location and the filename as parameters.

Step 4   Verify the file definitions and input data

The Data Definition File List Process (APPDFLS) shows the data on the incoming data file with the corresponding information from the Data Field Position Rules Form (AGATPFD). The format of the report produced by APPDFLS is similar to that of AGATPFD but includes the actual data values for each field. Use APPDFLS to see if your file definition is set up correctly on AGATPFD, and to check the incoming data on the file. The input file can be fixed length or character delimited.

APPDFLS is run from the Process Submission Controls Form (GJAPCTL) with the following parameters:

Parameter		Description
01	File Code	File code for the appropriate data source. Select List or the **Values** pull-down arrow to see valid values from the Data File Validation Form (ATVTAPE). Required.
02	Path of Data File - Part 1	Directory where the data load file is located (up to 30 characters). If the data file path is longer than 30 characters, parameters 08 and 09 are available to provide additional data file path details. Required.
03	Data File Name	Exact name of the file, including the extension. Required.
04	Data Source Identifier	Code that represents the data source. Select List or the **Values** pull-down arrow to see valid values from the Data Source Identifier Validation Form (ATVDSRC). Required.
05	Start Record Number	Number of the first record you want to process in the data file. This allows you to check a large data file in sections, rather than look at the whole file at one time. Optional.
06	End Record Number	Number of the last record you want to process in the data file. Use this with the **Start Record Number** to look at part of a large incoming file. Optional.
07	Header Record Exists	Code that indicates if the input file has a header record that Banner should not process as data.
		Y Input file has a header record that should not be processed as data.
		N First record on the file is actual data.
		This information is found on the incoming data file documentation from the vendor. Optional.
08	Path of Data File - Part 2	Additional details (up to 30 characters) for the directory where the data load file is located. Used with the Path of Data File - Part 1 parameter when the data file path is longer than 30 characters. This entry is concatenated to the end of the details entered in part 1. Optional.

Parameter		Description
09	Path of Data File - Part 3	Additional details (up to 30 characters) for the directory where the data file is located. Used with the Path of Data File - Part 1 and Part 2 parameters when the data file path is longer than 60 characters but less than 91 characters. This entry is concatenated to the end of the details entered in part 2. Optional.

Output from the process shows each field name and the data in that field. If the file is fixed length, it also shows the start position, end position, and occurrence. If the file is character delimited, it shows the field number and the occurrence. For more information about occurrences, refer to .

If the data does not look correct (for example, some characters that should appear in the first field actually appear in the second), then go back to AGATPFD and change the file definition for the incoming data file. If everything is correct, you can proceed.

For more information about APPDFLS, refer to the *Banner Advancement User Guide*.

Column Name	Value	Start	End	Occurs
BAN_PIDM	7	1	9	1
NAME_PREFIX		11	30	1
NAME_FIRST	Matthew All	31	59	1
NICKNAME		61	75	1
NAME_LAST	en	76	104	1
NAME_MIDDLE	R	105	111	1
EMAIL	mallenb@test.com	112	127	1
ADDR_STREET1	1111111 Long Street	128	150	1
ADDR_CITY	Masonlong	151	181	1
ADDR_STATE	OH	182	183	1
ADDR_COUNTRY		184	216	1
ADDR_ZIPC	45040	217	221	1
ADDR_PHONE_ALL	5131223345	222	231	1
CHILD_NAME_FIRST	Amanda	233	254	1
CHILD_DECEASED_IND		255	255	1
CHILD_NAME_LAST	Walker	256	274	1
INSTITUTION	Rhodes College	275	296	1
DEGREE	BA	297	298	1

Total Number of Records Reviewed: 1

End of Listing

* * * REPORT CONTROL INFORMATION * * *
parameter Message

USER:................ CNORRIS

Parameter Name	Value	Message
Parameter Seq No		
File Code	FIXLOAD	
Path of Data File - Part 1	/export/home/cnorris/	
Data File Name	/fixlong.dat	
Data Source Identifier	HARRIS	
Start Record Number	1	
End Record Number	9999999	
Header Record Exists	N	
Path of Data File - Part 2		
Path of Data File - Part 3		
Line Count	45	

Step 5   Run the MG Data Load Report (AGPMATC) in report mode

Before loading the matching gift information into Banner, you should test to make sure the data will load cleanly. Run the load process in report mode and review the various reports.

AGPMATC is run from the Process Submission Controls Form (GJAPCTL) with the following parameters:

Parameter		Description
01	File Code	File code for the appropriate data source. Select List or the **Values** pull-down arrow to see valid values from the Data File Validation Form (ATVTAPE). Required.
02	Name Type for Organization	Organization name type code to be used in the data load. Select List or the **Values** pull-down arrow to see valid values from the Name Type Validation Form (GTVNTYP).
		It is possible for a matching gift organization to have multiple names. This parameter allows you to handle situations where a PIDM appears on the returned file with a different name than any of those currently in Banner for that PIDM. If you enter a value for this parameter, AGPMATC adds a SPRIDEN record for the PIDM with the name type you specify here. Optional.
03	Name Type for Alias	Alias name type code to be used in the data load. Select List or the **Values** pull-down arrow to see valid values from the Name Type Validation Form (GTVNTYP).
		It is possible for a matching gift organization to have multiple names. This parameter allows you to handle situations where a PIDM appears on the returned file with an alias that does not currently exist in Banner for that PIDM. If you enter a value for this parameter, AGPMATC adds a SPRIDEN record for the PIDM with the name type you specify here. Optional.

Parameter		Description
04	Name Type for Fund	Fund name type code to be used in the data load. Select List or the **Values** pull-down arrow to see valid values from the Name Type Validation Form (GTVNTYP).
		It is possible for a matching gift organization to have multiple names. This parameter allows you to handle situations where a PIDM appears on the returned file with a fund name that does not currently exist in Banner for that PIDM. If you enter a value for this parameter, AGPMATC adds a SPRIDEN record for the PIDM with the name type you specify here. Optional.
05	Secondary Contact Code	Secondary contact type code to be used in the data load. Select List or the **Values** pull-down arrow to see valid values from the Organization Contact Type Validation Form (ATVOCON). Optional.

Note: Banner lets you choose which subsets of matching gift rules you want to load via parameters 06 through 09.

Parameter		Description
06	Eligible Employee	Indicator that determines whether to load rules that determine, at runtime, which employees are eligible to participate in the matching gift program. These rules appear on the Eligibility Requirements window on AOAMTCH. Required.
		Y Load rules.
		N Do not load rules (default).
07	Athletics	Indicator that determines whether to load rules that determine, at runtime, how the organization handles donations for athletics. These rules appear on the Eligibility Requirements window on AOAMTCH. Required.
		Y Load rules.
		N Do not load rules (default).
08	Affiliation	Indicator that determines whether to load rules that determine, at runtime, which affiliations are required for matching gifts. These rules appear on the Eligibility Requirements window on AOAMTCH. Required.
		Y Load rules.
		N Do not load rules (default).

Parameter		Description
09	Non eligibility	Indicator that determines whether to load rules that determine, at runtime, which employees are ineligible for the matching gift program. These rules appear on the Eligibility Requirements window on AOAMTCH. Required.
		Y Load rules.
		N Do not load rules (default).
10	Report/Update	Code that determines whether the database is updated when the process is run.
		R Print report; do not update database (default).
		U Print report; update database.
11	Source - HEP/CASE	Source of the returned file:
		H HEP (default)
		C CASE
12	HEP/CASE in File Name	Location to which you copied the source file. It must be the name of the file and the path to it. Required.
13	Address Type	Address type (for the matching gift organization) of the records to be loaded into the database. It must be a valid type code from the Address Type Code Validation Form (STVATYP).
		If the incoming data file contains an address type that matches this parameter value, and it does not already exist in Banner, AGPMATC adds the new address.
		If the incoming data file contains an address that matches this value and it already exists but the information is different, Banner makes the existing address inactive and creates a new record with the new information. Required.

Parameter		Description
14	Email Type	E-mail address type (for the matching gift organization) of the records to be loaded. It must be a valid type code from the E-mail Address Type Validation Form (GTVEMAL).
		If the incoming data file contains an e-mail address that matches an existing Banner record with this e-mail type, the details are not loaded. (It looks for a match on e-mail address *and* type.)
		If the incoming data file contains an e-mail address that does not match an existing Banner record with this e-mail type, a new e-mail address record is inserted. Required.
15	URL Type	URL type (for the matching gift organization) of the records to be loaded. It must be a valid type code from the E-mail Address Type Validation Form (GTVEMAL).
		If the incoming data file contains a URL that matches an existing Banner record with this type code, the details are not loaded. (It looks for a match on URL *and* type.)
		If the incoming data file contains a URL that does not match an existing Banner record with this type, a new URL record is inserted. Required.

For more information about AGPMATC, refer to the *Banner Advancement User Guide*.

Step 6   Review the output reports

Review the following AGPMATC output reports for any errors:

```
agpmatc_XXXX.lis
agpmatc_XXXX.lis2
agpmatc_XXXX.lis3
agpmatc_XXXX.lis4
agpmatc_XXXX.lis5
```

Make any changes necessary, based on what the reports indicate. If everything is correct, then you can proceed.

agpmatc_XXXX.lis

This report displays the matching gift information that was loaded from a parent company file into the Banner tables.

```
23-FEB-2009                          Watermark University                                              PAGE 1
                                     MG Data Load Report                                                AGPMATC
                                     Update Mode

Source ID   Banner ID     Company Name              Contact Name and Title
            A00022438     AMD                       Mr

Fundname                                            #124 00003 P.O. Box 7586

                                                    Street Line 3
Official Name                                       Street Line 4
AMD                                                 Princeton, NJ 08543
                                                    8005008199

Alias                                                          Distribution      Procedure    Other Non-Profit
                                                               A                 C            3 5 6 4 2

Min. Match Month    Max. Match Amount   Ratio       Max Tot. Emp. Ann    Employee Status     Acknowledgements
$    25.00          $  1500.00          100%        $    0.00            R                   Y- Receipt required.

Fiscal Year         Eligible Ed. Inst   Athletics   Employee Affiliation
                    G C S D E T                      G

Email Address:
Homepage URL:

Comments:


Source ID   Banner ID     Company Name              Contact Name and Title
            A00022440                               Ms. Ma Swope
                                                    Matching Gift Coordinator
Fundname                                            #124 00003 4333 Edgewood Rd. NE
AEGON USA Charitable Foundation
                                                    Street Line 3
Official Name                                       USA

                                                    Cedar Rapids, ID 52499
                                                    3193988935

Alias                                                          Distribution      Procedure    Other Non-Profit
                                                               M

Min. Match Month    Max. Match Amount   Ratio       Max Tot. Emp. Ann    Employee Status     Acknowledgements
$    25.00          $  1500.00          100%        $    0.00            F P R               Y- Receipt required.

Fiscal Year         Eligible Ed. Inst   Athletics   Employee Affiliation
                    G C S D E                       G

Email Address:
Homepage URL:

Comments:
```

23-FEB-2009
Watermark University
MG Data Load Report
Report Mode
PAGE 2
AGPMATC

* * * Report Control Information * * *

REPORT NAME: AGPMATC
CURRENT RELEASE: 8.2
PARAMETER SEQUENCE NUMBER:
FILE CODE: CNMATCTEST
NAME TYPE FOR ORG: ORGA
NAME TYPE FOR ALIAS: NICK
NAME TYPE FOR FUND: FUND
CONTACT CODE: MG
UPDATE ELIGIBLE PERSONNEL/EMPLOYEE STATUS INFORMATION: Y
UPDATE ATHLETICES ELIGIBILITY PERSONNEL/EMPLOYEE STATUS INFORMATION: Y
UPDATE EMPLOYEE AFFILIATION REQUIREMENTS ELIGIBILITY INFORMATION: Y
UPDATE NON ELIGIBILITY INFORMATION: Y
ADDRESS TYPE: BU
EMAIL TYPE: WORK
URL TYPE: URL
REPORT[R]/UPDATE(U): R
SOURCE FOR INFORMATION - CASE(C)/HEP[H]: H
INPUT FILE: /export/home/cnorris/htest.dat
LINE COUNT: 55

agpmatc_XXXX.lis2

This report lists all the companies for which the matching ratios are non-standard. For example, if a company's policy is to give $3 for each $1 that an employee gives, that company would be listed on this report (a 1:1 or 2:1 ratio is standard).

Note

This report is only produced when you load CASE data.

```
23-FEB-2009 12:31:43PM                                    Development                                    Page 1
                                                 Non-Standard Ratio Report                              AGPMATC

ID        Company Name

00000240  American National Can Co.
Ratio: 2:1 up to $100 annual total matched per employee (cumulative), then 1:1.

00000841  Ameritech Corp.
Ratio: 2:1 up to $500 annual total matched per employee (cumulative), then 1:1. Accreditation: State registration accepted for K-12
schools also. Maximum: $5,500b for education; $5,500 for culture/arts. Distribution: Three times a year: April, August, or December.

00000855  A. E. Staley Manufacturing Co.
Ratio: 2:1 up to $100 annual total matched per employee (cumulative), then 1:1. Associations: National associations or funds
soliciting support for education eligible only if connected with an eligible institution or fund. Maximum: $2,500b for
noneducational. Ratio: 1:1 for noneducational.


End of Listing
```

apgmatc_XXXX.lis3

This report lists all the companies for which the secondary contact is not located in the United States.

Note

This report is only produced when you load CASE data.

```
23-FEB-2009 12:31:43PM                        Development                        Page 1
                                      Non-USA Country Report                     AGPMATC

     ID      Company Name                      Country

  00000973   Acuson                            SWEDEN
  00001006   Addison Wesley Longman            ENGLAND

End of Listing
```

apgmatc_XXXX.lis4

This report lists all the records that could not be loaded into the Banner tables automatically because they did not have a PIDM. These records must be entered into Banner manually, and this report contains the information you need to enter them. Be sure to check for the existing record using different spellings and acronyms for the name.

```
23-FEB-2009                                                                                    Page 1
                                        Development                                            AGPMATC
                        Organizations without a Banner ID Report

Source ID   Banner ID   Company Name
 5940000

Fundname
McDonald's Employee Matching Gifts                         Contact Name and Title
                                                          Ms. Jackie  Meara
                                                          Supervisor
Official Name                                             One Kroc Drive
McDonald's Corporation
                                                          Oak Brook, IL  60523
Alias                                                     (630)  623-7048

Min. Match  Month    Max. Match Amount                                Distribution      Procedure
 $      10            $     10000                                      Q                 A

Fiscal Year          Eligible Ed. Inst     Ratio          Max Tot. Emp. Ann    Employee Status   Other Non-Profit
01/01 - 12/31        F G C T               100%           $    10000           A R S

Email Address:                             Athletics      Employee Affiliation  Acknowledgements
Homepage URL:                                             N                     Y- Receipt required.

Comments:


ID Number and Name of Constituents with this employer

510000001     Matthew Andrew Allen
311115555     Sarah R Norris
@00002674     Amanda  Norris

    End of Listing
```

23-FEB-2009

Development
Organizations without a Banner ID Report

* * * Report Control Information * * *

REPORT NAME: AGPMATC
CURRENT RELEASE: 5.3
PARAMETER SEQUENCE NUMBER:
FILE CODE: HEP2001
NAME TYPE FOR ORG: ORGA
NAME TYPE FOR ALIAS: NICK
NAME TYPE FOR FUND: FUND
CONTACT CODE: MG
UPDATE ELIGIBLE PERSONNEL/EMPLOYEE STATUS INFORMATION: Y
UPDATE ATHLETICES ELIGIBILITY PERSONNEL/EMPLOYEE STATUS INFORMATION: Y
UPDATE EMPLOYEE AFFILIATION REQUIREMENTS ELIGIBILITY INFORMATION: Y
UPDATE NON ELIGIBILITY INFORMATION: Y
ADDRESS TYPE: MA
EMAIL TYPE: BUSI
URL TYPE: HPAG
REPORT[R]/UPDATE(U): U
SOURCE FOR INFORMATION - CASE(C)/HEP[H]: H
INPUT FILE: /u/designer/cnorris/hep2.dat
LINE COUNT: 55

apgmatc_XXXX.lis5

For all address types, this report lists all new addresses and changed addresses that had a problem with information (for example, required information is missing). These records cannot be loaded into Banner. After research, you might be able to enter the data into Banner manually.

```
23-FEB-2009                              Development                                   Page 1
                          Organizations with Address Updates Report                   AGPMATC

Source ID  Banner ID  Company Name              Previous Address        Incoming Address
 220000    220000     Aid Association for Lutherans                      4321 North Ballard Road

                                                                         Appleton, WI 54919


 225000    225000     Air Products and Chemicals, Inc.  17201 Hamilton Boulevard   7201 Hamilton Boulevard

                                                         Allentown, PA 18195        PA 18195

           ** Incoming Address Update bypassed due to missing data. **


 22110000  000000369  20th Century Industries    111 Emp                Employee Relations Department
                                                  6301 Owensmouth Avenue 6301 Owensmouth Avenue
                                                  Woodland Hills, CA 91367  Woodland Hills, CA 91367


End of Listing
```

```
23-FEB-2009                              Development                                   Page 2
                          Organizations with Address Updates Report                   AGPMATC

* * * Report Control Information * * *

REPORT NAME: AGPMATC
CURRENT RELEASE: 5.3
PARAMETER SEQUENCE NUMBER:
FILE CODE: HEP2001
NAME TYPE FOR ORG: ORGA
NAME TYPE FOR ALIAS: NICK
NAME TYPE FOR FUND: FUND
CONTACT CODE: MG
UPDATE ELIGIBLE PERSONNEL/EMPLOYEE STATUS INFORMATION: Y
UPDATE ATHLETICES ELIGIBILITY PERSONNEL/EMPLOYEE STATUS INFORMATION: Y
UPDATE EMPLOYEE AFFILIATION REQUIREMENTS ELIGIBILITY INFORMATION: Y
UPDATE NON ELIGIBILITY INFORMATION: Y
ADDRESS TYPE: MG
EMAIL TYPE: BUSI
URL TYPE: HPAG
REPORT[R]/UPDATE(U):) U
SOURCE FOR INFORMATION - CASE(C)/HEP[H]: H
INPUT FILE: hep2e.dat
LINE COUNT: 55
```

Step 7 Run the MG Data Load Report (AGPMATC) in update mode

Run AGPMATC as described in step 5, except enter *U* (update) as parameter 10 rather than *R* (report). In update mode, AGPMATC loads data into permanent Banner tables.

The following data is always updated on AOAORGN when you run the process in update mode:

- Minimum gift amount

- Maximum gift amount

- Ratio

- Maximum total annual match for an employee

- Fiscal year

- Last load source

- Last load ID

- Last load date

The following data can also be updated, depending on the parameters you select on GJAPCTL:

- Organization name related information (APAIDEN) (updates addresses only)

- Matching gift program administrator information (AOAORGN secondary contacts)

- Athletic matching gift purpose eligibility information (AOAMTCH Matching Gift Purpose)

- Matching gift eligible employee status information (AOAORGN Employee Requirement)

- Matching gift eligible educational institution information (AOAMTCH Educational Institution)

- Employee attendance information (AOAMTCH Alumni Status)

Step 8 (Optional) Load and link subsidiary organizations

Run the Matching Gift Subsidiary Data Load Report (AGPMATS) to load subsidiary company name information into the SPRIDEN table and link subsidiary organizations to their parent companies. The process creates cross-references that can be viewed on the Cross Reference Form (APAXREF). Similar to AGPMATC, this report uses the name type to determine which record should be updated if there are multiple names or acronyms for the same PIDM.

AGPMATS has the following prerequisites:

- The parent organization must exist in Banner.

- If you want to set up a cross reference to indicate a parent/subsidiary relationship, the cross reference codes must exist on the Cross Reference Validation Form (ATVXREF).

- The name type code you use for the name of the parent company or subsidiary must exist in the Name Type Validation Form (GTVNTYP).

Run this process in report mode to verify the changes. AGPMATS is run from the Process Submission Controls Form (GJAPCTL) with the following parameters:

Parameter		Description
01	Name Type	Name type of the parent company. Required.
02	Name Type for Subsidiary	Name type of the subsidiary. Optional.
03	Xref Code for Parent	Cross-reference code that represents the relationship between the parent and the subsidiary. If you enter this code, a cross-reference record is added for both IDs. The records can be displayed and reviewed on APAXREF. Optional.
04	Report Mode	Code that determines whether the database is updated when the process is run.
		R Print report; do not update database (default).
		U Print report; update database.
05	Source - HEP/CASE	Source of the data file:
		H HEP (default)
		C CASE
06	HEP/CASE Input File Name	Path and file name of the input file. Required.

Review the report that is produced to verify the changes. Once the data is verified, run AGPMATS in update mode to create the actual cross-reference links.

For more information about AGPMATS, refer to the *Banner Advancement User Guide*.

```
18-APR-2000 02:59:57PM                                        Development                                              PAGE  1
AGPMATS                                              MG  Subsidiary Data Load Report

                                                           Report Mode


Parent Company Information

Source ID  Banner ID   Company Name
6320000    6320000     AEGON USA, Inc.

Subsidiary Company Information

Source ID  Banner ID   Company Name
6320010

Subsidiary Name
Advanced Financial Services Division          NO UPDATE

Cross Reference:



Parent Company Information

Source ID  Banner ID   Company Name
                       NO UPDATE

Subsidiary Company Information

Source ID  Banner ID   Company Name
6320010

Subsidiary Name
Advanced Financial Services Division          NO UPDATE

Cross Reference:
```

```
18-APR-2000 02:59:57PM                                    Development                                    PAGE  530
                                              MG Subsidiary Data Load Report                             AGPMATS
                                                       Report Mode


* * * Report Control Information * * *


REPORT NAME: AGPMATS
CURRENT RELEASE: 4.3
PARAMETER SEQUENCE NUMBER:
NAME TYPE: HEP
NAME TYPE FOR SUBSIDIARY: HEP
XREF CODE: COR
REPORT[R]/UPDATE(U): R
LINE COUNT: 55
SOURCE FOR INFORMATION - CASE(C)/HEP[H]: H
INPUT FILE: /u/designer/cnorris/hepsub.dat
```

Step 9 (Optional) Review employee records for potential matching gifts

Run the Expected Matching Gift Allocations Report (AXPMATG) or the Matching Gift Allocations Report (AGPMATG) to identify other potential matching gifts to which your institution might be entitled. These processes create the waiting matching gift payment records that are displayed on the Employer Matching Gift Payment Form (AGAMATG).

📑 **Note**

> AXPMATG and AGPMATG are similar. AXPMATG, however, has more functionality because it uses the same processing logic that the online gift and pledge entry forms use to evaluate matching gifts. AXPMATG also updates the reasons why a pledge or gift is not eligible to be matched. It is recommended that you use AXPMATG instead of AGPMATG. ■

If the ID whose gift was matched is the spouse of an eligible employee, (*SPS*) appears after the ID's name. Only gifts that are in a finalized cashiering session and have not already been processed by this report are selected.

AXPMATG and AGPMATG are run from the Process Submission Controls Form (GJAPCTL). AXPMATG is run with the following parameters:

Parameter		Description
01	Pledge, Gift, or Both	Code that indicates what records are processed:
		P Pledges only
		G Gifts only
		B Both pledges and gifts
02	Beginning Date	Beginning date to process matching gifts.
03	Ending Date	Ending date to process matching gifts.

AGPMATG is run with the following parameter:

Parameter		Description
01	Report or Report/ Update	Code that determines whether the database is updated when the process is run.
		R Print report; do not update database (default).
		U Print report; update database.

For more information about AXPMATG and AGPMATG, refer to the *Banner Advancement User Guide*.

This is a sample of the AGPMATG report output:

```
09-DEC-1998 15:11:12                    Watermark University                                      AGPMATG
PAGE 1
                               Matching Gift Allocations
                                      Report Only

MG ORG ID       MG ORG NAME                DUPLICATE - Y
510000035       Maryland Broadcasting Corp.

                                        MATCH %       MINIMUM   PERSON MAX       ORG MAX
                                        150.00

                                        RATIO %       BEGIN                      END
                                         50.00           1.00                       500.00
                                         25.00         500.01                     10,000.00
                                         25.00      10,000.01                  9,999,999.99

MATCHING ID   MATCHING NAME               DUPLICATE - Y
510000035     Maryland Broadcasting Corp.

                                        MATCH %       MINIMUM   PERSON MAX       ORG MAX
                                        150.00

                                        RATIO %       BEGIN                      END
                                         50.00           1.00                       500.00
                                         25.00         500.01                     10,000.00
                                         25.00      10,000.01                  9,999,999.99

CONSTITUENT ID    CONSTITUENT NAME       GIFT DATE    GIFT NO   QUALIFY AMT   MATCH AMOUNT
990000019 (SPS)   Holly T. Alison        09-DEC-1998  0004042     25.00          12.50
                                                      TOTALS:    $25.00         $12.50
995000005         George Richard Black   24-NOV-1998  0003907     25.00          12.50
                                                      TOTALS:    $25.00         $12.50
990000003         Kevin D. Rolfe         09-DEC-1998  0004040     50.00          25.00
                                                      TOTALS:    $50.00         $25.00
990000004         Margaret C. Rolfe      09-DEC-1998  0004041     50.00          25.00
                                                      TOTALS:    $50.00         $25.00

                                        MG ORG TOTALS:          $150.00         $75.00
```

```
09-DEC-1998 15:11:12                               Watermark University
PAGE 3
                                               Matching Gift Allocations
AGPMATG
                                                     Report Only


                                          * * * REPORT CONTROL INFORMATION * * *


RPTNAME: AGPMATG
PARAMETER SEQUENCE NUMBER:
REPORT OR REPORT/UPDATE: R
LINE COUNT: 55

RECORD COUNT: 5
```

This is a sample of the AXPMATG report output.

CONSTITUENT ID	CONSTITUENT NAME	GIFT DATE	GIFT NUMBER	GIFT AMT	QUALIFY AMT	MATCH AMT	MATCHING GIFT COMPANY
990000001	Allen, Matthew A.	09-MAY-1996	0000410	$100.00	$100.00	$100.00	510000035 Maryland Broadcasting Corporation, Inc
		09-MAY-1996	0000412	$100.00	$100.00	$100.00	510000035 Maryland Broadcasting Corporation, Inc
		10-JUL-1996	0000494	$50.00	$50.00	$50.00	510000035 Maryland Broadcasting Corporation, Inc
	TOTAL:			$250.00	$250.00	$250.00	
990000002 (S)	Allen, Roberta Evans	09-MAY-1996	0000406	$1,500.00	$1,500.00	$1,500.00	510000035 Maryland Broadcasting Corporation, Inc
990000139	Chaves, Tom Andrew	09-MAY-1996	0000421	$100.00	$100.00	$250.00	@00000140 Chaves, Inc
		10-JUL-1996	0000472	$100.00	$100.00	$250.00	@00000140 Chaves, Inc
		10-JUL-1996	0000487	$25.00	$25.00	$62.50	@00000140 Chaves, Inc
		10-JUL-1996	0000492	$111.00	$111.00	$111.00	@00000140 Chaves, Inc
		10-JUL-1996	0000493	$122.00	$122.00	$122.00	@00000140 Chaves, Inc
		10-JUL-1996	0000500	$65.00	$65.00	$162.50	@00000140 Chaves, Inc
		10-JUL-1996	0000503	$81.00	$81.00	$202.50	@00000140 Chaves, Inc
		10-JUL-1996	0000507	$50.00	$50.00	$125.00	@00000140 Chaves, Inc
		10-JUL-1996	0000508	$500.00	$500.00	$500.00	@00000140 Chaves, Inc
	GRAND TOTALS:			$2,904.00	$2,904.00	$3,535.50	

* * * * REPORT CONTROL INFORMATION * * * *

REPORT NAME: AXPMATG
PARAMETER SEQUENCE NUMBER:
PLEDGE, GIFT OR BOTH: B
STARTING DATE: 01-MAY-1996
ENDING DATE: 19-JUL-1996
LINE COUNT: 55

RECORD COUNT: 21

Load external ratings and directory information

The External Ratings and Directory Load Process (APPCUPD) loads the following information from third-party products to Banner:

- External ratings data

- Updated alumni information from a vendor that produces alumni directories. You can use this process with the Directory Data Extract Process (APPDEXT). APPDEXT extracts information to share with the vendor, the results are returned to your institution, and APPCUPD loads the updates into the Banner database.

Before loading data, you must perform the setup steps described in <u>"Set up a data load or a data extract" on page 2-1</u>.

Data that can be loaded

APPCUPD can load the following data into Banner. The ATVTPFD field names are used to define the file layout on the Data Field Position Rules Form (AGATPFD).

ATVTPFD Field Name	Banner Data Field	Description
ACTIVITY	APRACTY_ACTC_CODE	Activity code
ADDR_ACTIVITY_DATE	SPRADDR_ACTIVITY_DATE	Advancement individual address activity date
ADDR_CITY	SPRADDR_CITY	Advancement individual city (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.
ADDR_CODE	SPRADDR_ATYP_CODE	Advancement individual address type code

ATVTPFD Field Name	Banner Data Field	Description
ADDR_COUNTRY	SPRADDR_NATN_CODE	Advancement individual country (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.
ADDR_FAX_AREA	SPRTELE_PHONE_AREA	Advancement individual fax area code
ADDR_FAX_NUM	SPRTELE_PHONE_NUMBER	Advancement individual fax number
ADDR_HOUSE_NUMBER	SPRADDR_HOUSE_NUMBER	Advancement individual house number, a unique number assigned to each building on a street or in an area and used as part of the postal address in some countries

ATVTPFD Field Name	Banner Data Field	Description
ADDR_PHONE_ALL	SPRTELE_PHONE_NUMBER	Advancement individual phone number with area code and extension (repeating)
		The selection is based on STVTELE = parameter value where occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of phone is loaded as MA. If the second parameter value = BU, the second occurrence of phone is loaded as BU.
		The first six characters of ADDR_PHONE_ALL are processed as the area code; the next 12 characters are processed as the phone number; the next 10 characters are processed as the extension. For example, a typical incoming U.S. phone number would be formatted as 610 5551212 1234. To better control your data load, it is recommended that you use ADDR_AREA_CODE, ADDR_PHONE, and ADDR_PHONE_EXT instead of ADDR_PHONE_ALL.
ADDR_PHONE_AREA	SPRTELE_PHONE_NUMBER	Advancement individual phone area code (repeating)
		The selection is based on STVTELE = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of phone is loaded as MA. If the second parameter value = BU, the second occurrence of phone is loaded as BU.

ATVTPFD Field Name	Banner Data Field	Description
ADDR_PHONE_COUNTRY_CODE	SPRTELE_CTRY_CODE_PHONE	Code that designates the region and country of the telephone number of the advancement individual
ADDR_PHONE_EXT	SPRTELE_PHONE_NUMBER	Advancement individual phone number extension (repeating)

The selection is based on STVTELE = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of phone is loaded as MA. If the second parameter value = BU, the second occurrence of phone is loaded as BU. |
| ADDR_PHONE_NUM | SPRTELE_PHONE_NUMBER | Advancement individual phone number (repeating)

The selection is based on STVTELE = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of phone is loaded as MA. If the second parameter value = BU, the second occurrence of phone is loaded as BU. |

ATVTPFD Field Name	Banner Data Field	Description
ADDR_STATE	SPRADDR_STAT_CODE	Advancement individual state (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.
ADDR_STREET1	SPRADDR_STREET_LINE1	Advancement individual street address 1 (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.
ADDR_STREET2	SPRADDR_STREET_LINE2	Advancement individual street address 2 (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.

ATVTPFD Field Name	Banner Data Field	Description
ADDR_STREET3	SPRADDR_STREET_LINE3	Advancement individual street address 3 (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.
ADDR_STREET4	SPRADDR_STREET_LINE4	Advancement individual street address 4 (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.
ADDR_ZIP	SPRADDR_ZIP	Advancement individual ZIP (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.

ATVTPFD Field Name	Banner Data Field	Description
ADDR_ZIP4	SPRADDR_ZIP	Advancement individual ZIP - last four digits (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.
ADDR_ZIPC	SPRADDR_ZIP	Advancement individual ZIP complete (repeating)
		The selection is based on STVATYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MA, the first occurrence of the address is loaded as MA. If the second parameter value = BU, the second occurrence of the address is loaded as BU.
BAN_PIDM	SPRIDEN_PIDM	Banner PIDM (unique identifier)
CHILD_BIRTHDATE	APRCRVW_BIRTH_DATE	Child's date of birth
CHILD_DECEASED_DATE	APRCRVW_DECEASED_DATE	Child's deceased date
CHILD_DECEASED_IND	APRCRVW_DECEASED_IND	Child's deceased indicator
CHILD_GENDER	APRCRVW_SEX	Child's gender
CHILD_NAME_FIRST	APRCRVW_FIRST_NAME	Child's first name
CHILD_NAME_LAST	APRCRVW_LAST_NAME	Child's last name
CHILD_NAME_MIDDLE	APRCRVW_MI	Child's middle name

ATVTPFD Field Name	Banner Data Field	Description
CHILD_PIDM	APRCRVW_CHLD_PIDM	Child's Banner PIDM
CHILD_SURNAME_ PREFIX	APRCHLD_SURNAME_PREFIX	Child's last name prefix
DEGREE	APRDRVW_DEGC_CODE	New degree
DEGREE_NAME	APRDRVW_DEG_NAME	New degree name (when no code is returned)
DEGREE_YEAR	APRDRVW_ACYR_CODE	Degree year
EMAIL	GOREMAL_EMAIL_ADDRESS	Advancement individual e-mail (repeating)
		The selection is based on GTVEMAL = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = HOME, the first occurrence of e-mail is loaded as HOME. If the second parameter value = HPAG the second occurrence of e-mail is loaded as HPAG.
EMAIL_CODE	GOREMAL_EMAL_CODE	E-mail type code
EMPR_ADDR_CODE	APRERVW_ATYP_CODE	Employer address type code(STVATYP = Employer Address Type parameter value)
EMPR_AREA_CODE	APRERVW_PHONE_AREA	Employer phone area code
EMPR_CITY	APRERVW_CITY	Employer address city
EMPR_COUNTRY	APRERVW_NATN_CODE	Employer country
EMPR_COUNTY	APRERVW_CNTY_CODE	Employer county
EMPR_EMAIL	APRERVW_EMAIL_ADDRESS	Employer e-mail
EMPR_EMAIL_CODE	APRERVW_EMAIL_CODE	Employer e-mail type code
EMPR_FAX	APRERVW_FAX_NUMBER	Employer fax number

ATVTPFD Field Name	Banner Data Field	Description
EMPR_FAX_ALL	APRERVW_FAX_AREA and APRERVW_FAX_NUMBER	Employer fax with area code
EMPR_FAX_AREA	APRERVW_FAX_AREA	Employer fax area code
EMPR_FROM_DATE	APRERVW_ADDR_FROM_DATE	Employer address start date
EMPR_HOUSE_NUMBER	SPRADDR_HOUSE_NUMBER	Employer house number, a unique number assigned to each building on a street or in an area and used as part of the postal address in some countries
EMPR_MATCH_GIFT	APRERVW_MG_IND	Employer matching gift indicator (Y/N)
EMPR_NAME	APRERVW_EMPR_NAME	Employer name
EMPR_PHONE	APRERVW_PHONE_NUMBER	Employer phone
EMPR_PHONE_ALL	APRERVW_PHONE_AREA APRERVW_PHONE_NUMBER APRERVW_PHONE_EXT	Employer phone with area code and extension The first six characters of are processed as the area code; the next 12 characters are processed as the phone number; the next 10 characters are processed as the extension. For example, a typical incoming U.S. phone number would be formatted as 610 5551212 1234. To better control your data load, it is recommended that you use EMPR_AREA_CODE, EMPR_PHONE, and EMPR_PHONE_EXT instead of EMPR_PHONE_ALL.
EMPR_PHONE_COUNTRY_CODE	SPRTELE_CTRY_CODE_PHONE	Code that designates the region and country of the employer telephone number
EMPR_PHONE_EXT	APRERVW_PHONE_EXT	Employer phone extension
EMPR_PIDM	APRERVW_EMPR_ID	Employer PIDM (from Banner)

ATVTPFD Field Name	Banner Data Field	Description
EMPR_STATE	APRERVW_STAT_CODE	Employer address state
EMPR_STREET1	APRERVW_STREET_LINE1	Employer address street 1
EMPR_STREET2	APRERVW_STREET_LINE2	Employer address street 2
EMPR_STREET3	APRERVW_STREET_LINE3	Employer address street 3
EMPR_STREET4	APRERVW_STREET_LINE4	Employer address street 4
EMPR_TO_DATE	APRERVW_ADDR_TO_DATE	Employer address end date
EMPR_ZIP	APRERVW_ZIPC	Employer address ZIP - first five digits
EMPR_ZIP4	APRERVW_ZIPC	Employer address ZIP - last four digits
EMPR_ZIPC	APRERVW_ZIPC	Employer address complete ZIP
EXCL_CODE	APREXCL_EXCL_CODE	Exclusions (including do not mail/phone, do not include, do not solicit)
EXCL_END_DATE	APREXCL_END_DATE	Date when the exclusion ends
EXCL_REASON	APREXCL_REASON	Reason that the exclusion applies to the ID
EXCL_START_DATE	APREXCL_DATE	Date when the exclusion starts
EXT_ACTIVITY_DATE	AMREXRT_ACTIVITY_DATE	Activity date
EXT_RATE_SOURCE	AMREXRT_EXRS_CODE	External rating source
EXTERNAL_LEVEL	AMREXRT_EXT_LEVEL	Level
EXTERNAL_SCORE	AMREXRT_EXT_SCORE	Score
EXTERNAL_VALUE	AMREXRT_EXT_VALUE	Value
INCOME	APBCONS_INCM_CODE	Advancement individual income detail
INST_CODE	APRDRVW_SBGI_CODE	Banner institution attended code
INSTITUTION	APRDRVW_INST_NAME	New degree institution
JOB_CATEGORY	APRERVW_JOBC_CODE	Job category

ATVTPFD Field Name	Banner Data Field	Description
JOB_CATEGORY2	APRERVW_JOBC_CODE2	Job category 2
JOB_CATEGORY3	APRERVW_JOBC_CODE3	Job category 3
JOB_CATEGORY4	APRERVW_JOBC_CODE4	Job category 4
JOB_EMP_STATUS	APRERVW_EMPS_CODE	Job status
JOB_FROM_DATE	APRERVW_FROM_DATE	Employee's job start date
JOB_PRIMARY_IND	APRERVW_PRIMARY_IND	Primary employer indicator (Y/N)
JOB_SICC_CODE	APRERVW_SICC_CODE	Occupation/career code (SIC code)
JOB_TITLE	APRERVW_EMPL_POSITION	Employee's job title
JOB_TO_DATE	APRERVW_TO_DATE	Employee's job end date
JOB_WKLY_HOURS	APRERVW_WKLY_HOURS	Weekly hours worked
MAIDEN_NAME_LAST	APBCONS_MAIDEN_LAST_NAME	Maiden last name
MAJOR	APRDRVW_MAJR_CODE	Banner major code
MAJOR2	APRDRVW_MAJR_CODE2	Banner major code 2
MAJOR3	APRDRVW_MAJR_CODE3	Banner major code 3
MAJOR_NAME	APRDRVW_MAJOR_NAME	New major name (when no code is returned)
MAJOR_NAME2	APRDRVW_MAJOR_NAME2	New major name 2 (when no code is returned)
MAJOR_NAME3	APRDRVW_MAJOR_NAME3	New major name 3 (when no code is returned)
MARITAL_STATUS	SPBPERS_MRTL_CODE	Marital status

ATVTPFD Field Name	Banner Data Field	Description
NAME_FIRST	SPRIDEN_FIRST_NAME	First name (repeating)
		The selection is based on GTVNTYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MAID, the first occurrence of first name is loaded as MAID. If the second parameter value = CASL, the second occurrence of first name is loaded as CASL.
NAME_LAST	SPRIDEN_LAST_NAME	Last name (repeating)
		The selection is based on GTVNTYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MAID, the first occurrence of last name is loaded as MAID. If the second parameter value = CASL, the second occurrence of last name is loaded as CASL.
NAME_MIDDLE	SPRIDEN_MI	Middle name (repeating)
		The selection is based on GTVNTYP = parameter value where the occurrence determines the sequence selection. For example, if the first parameter value = MAID, the first occurrence of middle name is loaded as MAID. If the second parameter value = CASL, the second occurrence of middle name is loaded as CASL.
NAME_PREFIX	SPBPERS_NAME_PREFIX	Name prefix
NAME_SUFFIX	SPBPERS_NAME_SUFFIX	Name suffix
NAME_SURNAME_PREF IX	SPRIDEN_SURNAME_PREFI X	Last name prefix

ATVTPFD Field Name	Banner Data Field	Description
NICKNAME	APBCONS_NICKNAME	Nickname for advancement individual
OCCUPATION_TITLE	APBCONS_DOTT_CODE	Occupation title
PHONE_COUNTRY_COD E	SPRTELE_CTRY_CODE_PHO NE	Code that designates the region and country of the telephone number
PREF_ADDRESS_CODE	APBCONS_ATYP_CODE_PRE F	Preferred address code
PREFERRED_CLASS	APBCONS_PREF_CLAS	Preferred class
RESEARCH_COMMENTS	AMRPUSR_VALUE	Research data comments
RESEARCH_SOURCE	AMRPSRC_SORC_CODE	Source
RESEARCH_USER	AMRPUSR_USRC_CODE	Research data user
RESEARCHER	AMRPRSC_IDEN_CODE_RSC H	Researcher
SCHOOL_CODE	APRDRVW_COLL_CODE	School/college
SOURCE_ACT_DATE	APRCRVW_ACTIVITY_DATE APRDRVW_ACTIVITY_DATE APRSRVW_ACTIVITY_DATE APRERVW_ACTIVITY_DATE	Third-party source activity date
SP_AREA_CODE	APRSRVW_PHONE_AREA	Spouse's phone area code
SP_BIRTHDATE	APRSRVW_BIRTH_DATE	Spouse's birth date
SP_CITY	APRSRVW_CITY	Spouse's address city
SP_COUNTRY	APRSRVW_NATN_CODE	Spouse's country
SP_COUNTY	APRSRVW_CNTY_CODE	Spouse's county
SP_DECEASED_DATE	APRSRVW_DEAD_DATE	Spouse's deceased date
SP_DECEASED_IND	APRSRVW_DEAD_IND	Spouse's deceased indicator
SP_EMAIL	APRSRVW_EMAIL_ADDRESS	Spouse's e-mail
SP_FAX	APRSRVW_FAX_NUMBER	Spouse's fax number
SP_FAX_AREA	APRSRVW_FAX_AREA	Spouse's fax area code

ATVTPFD Field Name	Banner Data Field	Description
SP_FROM_DATE	APRSRVW_ADDR_FROM_DATE	Spouse's address start date
SP_HOUSE_NUMBER	SPRADDR_HOUSE_NUMBER	Spouse's house number, a unique number assigned to each building on a street or in an area and used as part of the postal address in some countries
SP_MAIDEN_NAME_LAST	APRSRVW_MAIDEN_NAME	Spouse's maiden last name
SP_MAR_END_DATE	APRSRVW_MRTL_END_DATE	Marriage end date
SP_MAR_START_DATE	APRSRVW_MRTL_START_DATE	Marriage start date
SP_MARITAL_CODE	APRSRVW_MRTL_CODE	Marital code
SP_MARITAL_IND	APRSRVW_MARS_IND	Current spouse indicator
SP_NAME_FIRST	APRSRVW_FIRST_NAME	Spouse's first name
SP_NAME_LAST	APRSRVW_LAST_NAME	Spouse's last name
SP_NAME_MIDDLE	APRSRVW_MI	Spouse's middle name
SP_NAME_PREFIX	APRSRVW_NAME_PREFIX	Spouse's prefix
SP_NAME_SUFFIX	APRSRVW_NAME_SUFFIX	Spouse's suffix
SP_PHONE	APRSRVW_PHONE_NUMBER	Spouse's phone

ATVTPFD Field Name	Banner Data Field	Description
SP_PHONE_ALL	APRSRVW_PHONE_AREA APRSRVW_PHONE_NUMBER APRSRVW_PHONE_EXT	Spouse's phone with area code and extension
		The first six characters are processed as the area code; the next 12 characters are processed as the phone number; the next 10 characters are processed as the extension. For example, a typical incoming U.S. phone number would be formatted as 610 5551212 1234. To better control your data load, it is recommended that you use SP_AREA_CODE, SP_PHONE, and SP_PHONE_EXT instead of SP_PHONE_ALL.
SP_PHONE_COUNTRY_CODE	SPRTELE_CTRY_CODE_PHONE	Code that designates the region and country of the spouse's telephone number
SP_PHONE_EXT	APRSRVW_PHONE_EXT	Spouse's phone extension
SP_STATE	APRSRVW_STAT_CODE	Spouse's address state
SP_STREET1	APRSRVW_STREET_LINE1	Spouse's address street 1
SP_STREET2	APRSRVW_STREET_LINE2	Spouse's address street 2
SP_STREET3	APRSRVW_STREET_LINE3	Spouse's address street 3
SP_STREET4	APRSRVW_STREET_LINE4	Spouse's address street 4
SP_SURNAME_PREFIX	APRCSPS_SURNAME_PREFIX	Spouse's last name prefix
SP_TO_DATE	APRSRVW_ADDR_TO_DATE	Spouse's address end date
SP_ZIP	APRSRVW_ZIP	Spouse's address ZIP - first five digits
SP_ZIP4	APRSRVW_ZIP	Spouse's address ZIP - last four digits
SP_ZIPC	APRSRVW_ZIP	Spouse's address ZIP - complete

ATVTPFD Field Name	Banner Data Field	Description
SPS_PIDM	APRSRVW_SPS_PIDM	Spouse's Banner PIDM
SS_NUMBER	SPBPERS_SSN	Social security number

Steps

Use the following steps to load external ratings and directory information to Banner:

- Step 1, "Verify the file definitions and input data"
- Step 2, "Run the External Ratings and Directory Load Process (APPCUPD) in report mode"
- Step 3, "Review the output reports"
- Step 4, "Run the External Ratings and Directory Load Process (APPCUPD) in update mode"
- Step 5, "Display all records in the temporary tables"
- Step 6, "Review and update records in the temporary tables"
- Step 7, "Load the verified records into the Banner permanent tables"

The following sections provide detailed instructions for each step.

Step 1   Verify the file definitions and input data

The Data Definition File List Process (APPDFLS) shows the data on the incoming data file with the corresponding information from the Data Field Position Rules Form (AGATPFD). The format of the report produced by APPDFLS is similar to the format of AGATPFD but includes the actual data value for each field. Use APPDFLS to see if your file definition is set up correctly on AGATPFD, and to check the incoming data on the file. The input file can be fixed length or character delimited.

APPDFLS is run from the Process Submission Controls Form (GJAPCTL) with the following parameters:

Parameter		Description
01	File Code	File code for the appropriate data source. Select List or the **Values** pull-down arrow to see valid values from the Data File Validation Form (ATVTAPE). Required.
02	Path of Data File - Part 1	Directory where the data load file is located (up to 30 characters). If the data file path is longer than 30 characters, parameters 08 and 09 are available to provide additional data file path details. Required.
03	Data File Name	Exact name of the file, including the extension. Required.
04	Data Source Identifier	Code that represents the data source. Select List or the **Values** pull-down arrow to see valid values from the Data Source Identifier Validation Form (ATVDSRC). Required.
05	Start Record Number	Number of the first record you want to process in the data file. This allows you to check a large data file in sections, rather than look at the whole file at one time. Optional.
06	End Record Number	Number of the last record you want to process in the data file. Use this with the **Start Record Number** to look at part of a large incoming file. Optional.
07	Header Record Exists	Code that indicates if the input file has a header record that Banner should not process as data.

07 — Header Record Exists (continued):

Y Input file has a header record that should not be processed as data.

N First record on the file is actual data.

This information is found on the incoming data file documentation from the vendor. Optional.

Parameter		Description
08	Path of Data File - Part 2	Additional details (up to 30 characters) for the directory where the data load file is located. Used with the Path of Data File - Part 1 parameter when the data file path is longer than 30 characters. This entry is concatenated to the end of the details entered in part 1. Optional.
09	Path of Data File - Part 3	Additional details (up to 30 characters) for the directory where the data file is located. Used with the Path of Data File - Part 1 and Part 2 parameters when the data file path is longer than 60 characters but less than 91 characters. This entry is concatenated to the end of the details entered in part 2. Optional.

Output from the process shows each field name and the data in that field. If the file is fixed length, it also shows the start position, end position, and occurrence. If the file is character delimited, it shows the field number and the occurrence. For more information about occurrences, refer to .

If the data does not look correct (for example, some characters that should appear in the first field actually appear in the second), then go back to AGATPFD and change the file definition for the incoming data file. If everything is correct, you can proceed.

For more information about APPDFLS, refer to the *Banner Advancement User Guide*.

Watermark University
File Definition Verification
Testing Load Inc

Column Name	Value	Position	Occurs
BAN_PIDM	45278	1	1
ADDR_HOUSE_NUMBER	AAAA	2	1
ADDR_STREET1	1Street1	3	1
ADDR_STREET2	1Street2	4	1
ADDR_STREET3	1Street3	5	1
ADDR_STREET4	1Street4	6	1
ADDR_CITY	Mason	7	1
ADDR_STATE	OH	8	1
ADDR_ZIP	11111	9	1
ADDR_HOUSE_NUMBER	BBBB	10	2
ADDR_STREET1	2Street1	11	2
ADDR_STREET2	2Street2	12	2
ADDR_STREET3	2Street3	13	2
ADDR_STREET4	2Street4	14	2
ADDR_CITY	Mason	15	2
ADDR_STATE	OH	16	2
ADDR_ZIP	22222	17	2
ADDR_HOUSE_NUMBER	CCCC	18	3
ADDR_STREET1	3Street1	19	3
ADDR_STREET2	3Street2	20	3
ADDR_STREET3	3Street3	21	3
ADDR_STREET4	3Street4	22	3
ADDR_CITY	Mason	23	3
ADDR_STATE	OH	24	3
ADDR_ZIP	33333	25	3
EMAIL	one@test	26	1
EMAIL	two@test	27	2
EMAIL	three@test	28	3
ADDR_PHONE_COUNTRY_CODE	9999	29	1
ADDR_PHONE_ALL	5131111111	30	1
ADDR_PHONE_COUNTRY_CODE	8888	31	2
ADDR_PHONE_ALL	5132222222	32	2
ADDR_PHONE_COUNTRY_CODE	7777	33	3
ADDR_PHONE_ALL	5133333333	34	3
EMPR_NAME	Martin Car Detailing Incorporated	35	1
SP_NAME_FIRST	Margaret	36	1
SP_SURNAME_PREFIX	Von	37	1
SP_NAME_LAST	Norristestoffieldlength	38	1
INSTITUTION	University of Duluth	39	1
INSTITUTION	Specialty Arts Academy	40	2
ADDR_FAX_COUNTRY_CODE	6666	41	1
ADDR_FAX_ALL	7777777777	42	1
CHILD_NAME_FIRST	Thomas	43	1
CHILD_SURNAME_PREFIX	Von	44	1
CHILD_NAME_LAST	Norris	45	1
CHILD_NAME_FIRST	Wayne	46	2
CHILD_SURNAME_PREFIX	Weis	47	2
CHILD_NAME_LAST	Norris	48	2
NAME_SURNAME_PREFIX	Von	49	1
NAME_FIRST	Walt	50	1
NAME_LAST	Thomas	51	1

June 2013   Banner Advancement 8.6.1
Data Load/Extract Handbook
Data Transfers Using Data Files   **2-83**

```
23-FEB-2009                          Watermark University                           PAGE        3
Rel 8.2                         File Definition Verification                         APPDFLS
                                      Testing Load Inc


                            * * * REPORT CONTROL INFORMATION * * *


USER:.......................  CNORRIS

Parameter Name                Value                        Message
                              _____                        _____

ILD_DECEASED_IND              2131137
File Code                     NEWDATA
Path of Data File - Part 1    /export/home/cnorris/
Data File Name                newdata.dat
Data Source Identifier        TEST
Start Record Number           1
End Record Number             9999999
Header Record Exists          Y
Path of Data File - Part 2    dataload/
Path of Data File - Part 3
Line Count                    45
```

Step 2 Run the External Ratings and Directory Load Process (APPCUPD) in report mode

Before loading the ratings and directory information into Banner, you should test to make sure the data will load cleanly. Run the load process in report mode and review the various reports.

APPCUPD is run from the Process Submission Controls Form (GJAPCTL) with the following parameters:

Parameter		Description
01	File Code	File code for the appropriate data source. Select List or the **Values** pull-down arrow to see valid values from the Data File Validation Form (ATVTAPE). Required.
02	Path of Data File - Part 1	Directory where the file to be loaded currently exists. This must be a location where Banner can access it. If the data file path is longer than 30 characters, parameters 23 and 24 are available to provide additional data file path details. Required.
03	Data File Name	Exact name of the file sent by the vendor. Required.
04	Data Source Identifier	Code that represents the data source. Select List or the **Values** pull-down arrow to see valid values from the Data Source Identifier Validation Form (ATVDSRC). Required.
05	Address Type	Code that represents the address type to be loaded.
		This parameter accepts multiple values and should be defined for every occurrence of address data. Add a sequence number before each address type to indicate the order of the address records on the data file (for example, 1BU).
		If an address in the incoming data file includes an address type, the address is loaded with that address type. If the address does not have an address type, it is loaded with address type 1 defined in this parameter. If the address does not have an address type and no address type is defined in this parameter, the address is not loaded.
		Select List or the **Values** pull-down arrow to see valid values from the Address Type Code Validation Form (STVATYP). Optional.

Parameter		Description
06	Phone Type	Code that represents the telephone type to be loaded. If you leave this parameter blank, no telephone details are loaded.
		This parameter accepts multiple values and should be defined for every occurrence of phone data. Add a sequence number before each phone type to indicate the order of the phone records on the data file (for example, 1BU).
		Select List or the **Values** pull-down arrow to see valid values from the Telephone Type Validation Form (STVTELE). Optional.
07	Fax Number Type	Code that represents the fax type to be loaded. If you leave this parameter blank, no fax details are loaded.
		This parameter accepts multiple values and should be defined for every occurrence of fax number data. Add a sequence number before each fax number type to indicate the order of the fax number records on the data file (for example, 1BU).
		Select List or the **Values** pull-down arrow to see valid values from the Telephone Type Validation Form (STVTELE). Optional.
08	E-mail Type	Code that represents the e-mail address type to be loaded. If you leave this parameter blank, no e-mail address details are loaded.
		This parameter accepts multiple values and should be defined for every occurrence of e-mail data. Add a sequence number before each e-mail type to indicate the order of the e-mail records on the data file (for example, 1BU).
		Select List or the **Values** pull-down arrow to see valid values from the E-mail Address Type Validation Form (GTVEMAL). Optional.
09	Employer Address Type	Code that represents the employer address type to be loaded. If you leave this blank, no employer address details are loaded.
		Select List or the **Values** pull-down arrow to see valid values from the Address Type Code Validation Form (STVATYP). Optional.

Parameter		Description
10	Employer Phone Type	Code that represents the employer phone type to be loaded. If you leave this blank, no employer telephone details are loaded.

Select List or the **Values** pull-down arrow to see valid values from the Telephone Type Validation Form (STVTELE). Optional. |
| 11 | Employer Fax Type | Code that represents the employer fax type to be loaded. If you leave this blank, no employer fax details are loaded.

Select List or the **Values** pull-down arrow to see valid values from the Telephone Type Validation Form (STVTELE). Optional. |
| 12 | Employer E-mail Type | Code that represents the employer e-mail address type to be loaded. If you leave this blank, no employer e-mail address details are loaded.

Select List or the **Values** pull-down arrow to see valid values from the E-mail Address Type Validation Form (GTVEMAL). Optional. |
| 13 | Spouse Address Type | Code that represents the spouse address type to be loaded. If you leave this blank, no spouse address details are loaded.

Select List or the **Values** pull-down arrow to see valid values from the Address Type Code Validation Form (STVATYP). Optional. |
| 14 | Spouse Phone Type | Code that represents the spouse phone type to be loaded. If you leave this blank, no spouse telephone details are loaded.

Select List or the **Values** pull-down arrow to see valid values from the Telephone Type Validation Form (STVTELE). Optional. |
| 15 | Spouse Fax Type | Code that represents the spouse fax type to be loaded. If you leave this blank, no spouse fax details are loaded.

Select List or the **Values** pull-down arrow to see valid values from the Telephone Type Validation Form (STVTELE). Optional. |

Parameter		Description
16	Spouse E-mail Type	Code that represents the spouse e-mail address type to be loaded. If you leave this blank, no spouse e-mail address details are loaded.
		Select List or the **Values** pull-down arrow to see valid values from the E-mail Address Type Validation Form (GTVEMAL). Optional.
17	Name Type	Code that represents the name type to be loaded. If you leave this blank, no name details are loaded.
		This parameter accepts multiple values. Add a sequence number before each name type to indicate the order of the name records on the data file (for example, 1LEGL).
		Select List or the **Values** pull-down arrow to see valid values from the Name Type Validation Form (GTVNTYP). Optional.
18	Preferred E-mail	Code that represents the preferred e-mail address if you want to change an incoming e-mail address with a certain type code to be the preferred e-mail address. If you don't want to change it, leave this blank.
		Select List or the **Values** pull-down arrow to see valid values from the E-mail Address Type Validation Form (GTVEMAL). Optional.
19	Report/Update Mode	Mode in which you want to run the report. Enter *R* to produce reports without changing anything in Banner; enter *U* to update the Banner tables. Required.
20	Line Count	Number of lines per page for the output report. Defaults to 55. Optional.
21	Date Format	Date format that overrides the system-defined date format for this execution of APPCUPD. Must be a valid Oracle date format. Used solely to evaluate incoming dates and load details to Banner. Optional.

Parameter		Description
22	File Source Date	Date used for file source details if the incoming data file does not have this detail.
		If the mapping on the Data Field Position Rules Form (AGATPFD) contains a reference to the SOURCE_ACT_DATE field, that value is used for the file source date. If AGATPFD does not contain this reference, the value in the File Source Date parameter is used. If neither is defined, the current system date is used as the file source date.
		Note: If a date format is entered in parameter 21, then this same date format *must* be used when entering a value for parameter 22.
23	Path of Data File - Part 2	Additional details (up to 30 characters) for the directory where the data file is located. Used with parameter 02 when the data file path is longer than 30 characters. This entry is concatenated to the end of the details entered in parameter 01. Optional.
24	Path of Data File - Part 3	Additional details (up to 30 characters) for the directory where the data file is located. Used with the parameters 02 and 23 when the data file path is longer than 60 characters but less than 91 characters. This entry is concatenated to the end of the details entered in parameter 23. Optional.
25	Address Phone Type	Phone type assigned to phone numbers that are associated with addresses in the data file.
		Select List or the **Values** pull-down arrow to see valid values from the Telephone Type Validation Form (STVTELE). Optional.

Parameter		Description
26	Maintain Pref Email Setting	Setting that determines how preferred e-mail addresses are maintained when the process is run. This parameter is used with Parameter 18. Required.

Y   Insert an incoming e-mail address as the "preferred" e-mail address if it has the same address type as the original preferred e-mail address. Insert all other incoming e-mail addresses without the "preferred" indicator.

N   Insert an incoming e-mail address as the "preferred" e-mail address only if it has the address type that is specified in Parameter 18. Insert all other incoming e-mail addresses without the "preferred" indicator, thereby retaining the "preferred" indicators on the original e-mail addresses.

For more information about APPCUPD, refer to the *Banner Advancement User Guide*.

Step 3   Review the output reports

Review the details on the APPDFLS and APPCUPD output reports for any errors.

Example

If the file definition created on the Data Position Rules Form (AGATPFD) includes three different address sequences (by using occurrences), you must define three different address type parameter values (parameter 05) to specify how the data will be loaded. If the corresponding parameter details are missing, the process displays only those address records that will be loaded (those with appropriate mapping details on AGATPFD where the parameter value is identified when the process is executed). Address records are not loaded if either the mapping is not defined or the corresponding parameters are missing. For more information about occurrences, refer to <u>"Using occurrences" on page 2-15</u>.

Make any needed adjustments to the file definition on AGATPFD. If bad data details are identified, correct the issues in the data file as needed. You might need technical assistance at your institution if the data file needs changes and you are not familiar with the change process.

Step 4   Run the External Ratings and Directory Load Process (APPCUPD) in update mode

Run APPCUPD as described in step 2, except enter *U* (update) as parameter 19 rather than *R* (report). In update mode, APPCUPD loads some incoming data into permanent Banner tables and some data into temporary tables.

Data loaded into permanent tables

When executed in update mode, APPCUPD automatically loads some of the incoming data into the following Banner tables. (The remaining data is loaded into temporary tables.)

> SPRIDEN
> SPRTELE
> SPRADDR
> GOREMAL
> SPBPERS
> APBCONS
> AMRPRSC
> AMRPUSR
> AMREXRT

APPCUPD loads information based on the Banner PIDM. This internal identifier must exist to load data for an advancement individuals or advancement organization. If the PIDM is missing, the record is listed on the output report and the information is not loaded into any Banner tables.

In general, data is loaded as follows:

- If information on the incoming data file is the same as existing data in the Banner tables, the new data is ignored.

- If the new data is different from the existing data, the way data is loaded depends on whether the data is repeating. For repeating data, the new data is inserted in Banner as a new record. For non-repeating data, the new data is noted on the report but existing Banner details are not updated.

> 📒 **Note**
>
> Because "from" and "to" dates are used with addresses, the preceding rule always applies to addresses. See "Address information" on page 2-95 for more information. ∎

- If the new data does not already exist, it is loaded into the Banner tables.

When name information is loaded into the Banner tables, the prefix and suffix information is added to the name automatically if that information is provided by the third-party vendor and the values are missing in the existing Banner data. Data details provided for the prefix are loaded to SPBPERS_NAME_PREFIX. Data details provided for the suffix are loaded to SPBPERS_NAME_SUFFIX.

Data loaded into temporary tables

APPCUPD loads some incoming data into temporary tables. The remaining steps describe the process for displaying a list of records in the temporary tables, reviewing these records, and loading data to permanent Banner tables.

Step 5   Display all records in the temporary tables

Access the Data Load ID List Inquiry Form (APILRVW) to display a list of all records loaded into the temporary tables. The default sort order is alphabetical. The secondary sort order is by source. This form is used in the following steps to review and load data to permanent Banner tables.

The **Name**, **ID**, **Source**, **Source Date**, **Date Loaded**, and load indicators are displayed for each record. The load indicators show the load status of employer, degree, spouse, and child records:

- *P* (pending review) - Data in the associated hold table has not been reviewed for loading.

- *L* (ready to load) - Data in the associated hold table has been reviewed and the load check box is checked.

- *N* (no data) - No data exists in the associated hold table for this ID.

Data Load ID List Inquiry APILRVW 8.0 (s10b80)

Name	ID	Source	Source Date	Date Loaded	Load Employer	Load Degree	Load Spouse	Load Child
Admit, Three times	A00045770	APPSTDI	17-AUG-2007	17-AUG-2007	P	N	N	N
Allen, Matthew Lee	510000001	CPI	29-NOV-2004	29-NOV-2004	N	N	P	L
Allen, Matthew Lee	510000001	CPI	10-JAN-2005	10-JAN-2005	N	N	P	P
Allen, Matthew Lee	510000001	TEST	04-SEP-2003	29-NOV-2004	N	N	P	N
Allen, Matthew Lee	510000001	TEST	28-APR-2005	28-APR-2005	N	N	N	P
Allen, Matthew Lee	510000001	TEST	09-MAY-2005	09-MAY-2005	N	P	P	P
Allen, Matthew Lee	510000001	TEST	27-SEP-2005	27-SEP-2005	N	P	P	P
Cather, Amanda Alice	300444023	APPSTDI	17-AUG-2007	17-AUG-2007	P	N	N	N
Hightower, Amanda	311119999	TEST	01-AUG-2007	15-AUG-2007	P	N	N	N
Jones, Sienna	A00071118	TEST	24-JAN-2008	24-JAN-2008	P	N	P	P
Jones, Sienna	A00071118	TEST	25-JAN-2008	25-JAN-2008	P	N	P	P
Jones, Sienna	A00071118	TEST	30-JAN-2008	30-JAN-2008	P	N	P	P
Jones, Sienna	A00071118	TEST	04-FEB-2008	04-FEB-2008	P	N	P	P

Field	Description
Name	Name of the advancement individual with associated data in the temporary tables.
ID	Banner ID.
Source	Data source.
Source Date	Date provided by the source as the last update date.
Date Loaded	Date when APPCUPD was run for the displayed record.

Field	Description
Load Employer	Status of the employer load:
	P Pending review
	L Ready to load
	N No data exists
Load Degree	Status of the degree load:
	P Pending review
	L Ready to load
	N No data exists
Load Spouse	Status of the spouse load:
	P Pending review
	L Ready to load
	N No data exists
Load Child	Status of the child load:
	P Pending review
	L Ready to load
	N No data exists

Step 6   Review and update records in the temporary tables

The following forms can be used to review and update records in the temporary tables:

Type of Information	Review Form
Children information	Child Review Form (APACRVW)
Degree information	Degree Review Form (APADRVW)
Employer information	Employer Review Form (APAERVW)
Spouse information	Spouse Review Form (APASRVW)

1. Access the desired review form. There are two ways to access a review form:

- Use Direct Access to query an ID from the key block.

- Access a review form from APILRVW by highlighting a record and selecting Employer Review, Degree Review, Spouse Review, or Child Review from the Options menu. Menu options are available only if the corresponding load indicator is *P* (pending review).

2. Make any necessary changes on the review form.

3. Select the **OK to Load** check box to indicate that data is ready to load to permanent Banner tables.

4. Save your changes.

> **Note**
>
> If you return to APILRVW, the load indicator for that type of data is now *L* (ready to load). ∎

For more information about the review forms, refer to online help.

Step 7   Load the verified records into the Banner permanent tables

After you review the data and select the **OK to Load** check box on the review form, a record can be loaded into the permanent Banner tables. There are two ways to load records:

- Individually from the review form

- In a group from APILRVW

To load an individual record from the review form, select Load Record from the Options menu.
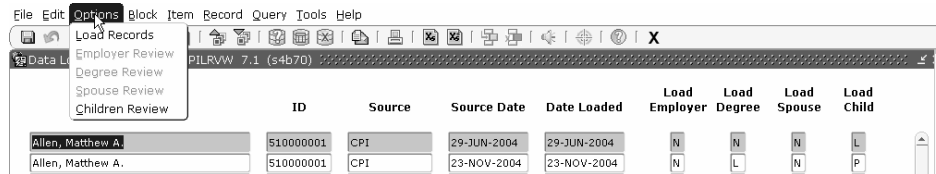
To load multiple records from APILRVW:

1. Access APILRVW. The load indicator is *L* (ready to load) for those records ready to load.

2. (Optional) Review and change additional records.

3. Select Load Records from the Options menu to load all records where the load indicator is *L.*

Once records are loaded to the permanent tables, Banner refreshes the list on APILRVW. If all data for a record was loaded, the record is no longer listed on APILRVW. If at least one temporary table record still exists, the record remains on APILRVW.

📑 **Note**

> An incoming data record might have details on more than one review form (for example, degree information and child information). When this occurs, each review form must be reviewed separately, the **OK to Load** check box must be selected on each review form, and each record must be loaded into the permanent tables before the record is removed from APILRVW.   ■

Address information

Addresses are handled differently than other types of data.The "from" and "to" dates determine how APPCUPD treats the new record. Be sure to review addresses carefully. The following examples show how addresses are loaded.

📑 **Note**

> When evaluating dates, APPCUPD uses the value in SOURCE_ACT_DATE as the current date when comparing it to SPRADDR_FROM_DATE.   ■

Incoming "to" date before other addresses begin

If the "to" date on the new record is before any other address begins for the same address type selected, then APPCUPD inserts the new record as an inactive address. It does not make the existing address inactive.

Example

Incoming record:	From date	=	01-MAY-2007
	To date	=	12-DEC-2007
Existing record:	From date	=	01-JAN-2008
	To date	=	end of time

Result:

New, inactive record:	From date	=	01-MAY-2007
	To date	=	31-DEC-2007
Unchanged existing record:	From date	=	01-JAN-2008
	To date	=	end of time

Incoming "from" date after other addresses ends

If the "from" date on the new record begins after any other address ends for the same address type selected, then APPCUPD inserts the new record.

Example

Incoming record:	From date	=	04-APR-2007
	To date	=	12-DEC-2009
Existing record:	From date	=	01-JAN-1980
	To date	=	31-DEC-2006

Result:

New record:	From date	=	04-APR-2007
	To date	=	12-DEC-2009
Unchanged existing record:	From date	=	01-JAN-1980
	To date	=	31-DEC-2006

Incoming "from" date between existing "from" and "to" dates

If the "from" date on the new record starts between the "from" and "to" dates of an existing record for the same address type selected, then APPCUPD inserts the new record and updates the "to" date for the existing record to be one less than the incoming "from" date.

Example

Incoming record:	From date	=	01-MAY-1981
	To date	=	01-MAY-1982
Existing record:	From date	=	01-JAN-1980
	To date	=	30-DEC-1981

Result:

New record:	From date	=	01-MAY-1981
	To date	=	01-MAY-1982
Updated existing record:	From date	=	01-JAN-1980
	To date	=	30-APR-1981

Incoming "to" date between existing "from" and "to" dates

If the "to" date on the new record is between the "from" and "to" dates of an existing record for the same address type selected, then APPCUPD inserts the new record and changes the "from" date on the existing record to be one more than the "to" date on the incoming record.

Example

Incoming record:	From date	=	01-MAY-1979
	To date	=	01-MAY-1982
Existing record:	From date	=	01-JAN-1980
	To date	=	31-DEC-1982

Result:

New record:	From date	=	01-MAY-1979
	To date	=	01-MAY-1982
Updated existing record:	From date	=	02-MAY-1982
	To date	=	31-DEC-1982

Incoming "from" and "to" dates between existing "from" and "to" dates

If the "from" and "to" dates on the incoming record come between the "from" and "to" dates on the existing record for the same address type selected, then APPCUPD does the following:

• Changes the "to" date on the existing record to be one day before the "from" date on the incoming record

- Inserts the incoming record without changing anything

- Inserts a copy of the existing address record where the "from" date is one day after the incoming record's "to" date

Example

Incoming record:	From date	=	01-MAY-1981
	To date	=	01-MAY-1982
Existing record:	From date	=	01-JAN-1980
	To date	=	End of time

Result:

Updated existing record:	From date	=	01-JAN-1980
	To date	=	30-APR-1981
New record:	From date	=	01-MAY-1981
	To date	=	01-MAY-1982
New record:	From date	=	02-MAY-1982
	To date	=	End of time

Incoming "from" and "to" dates come before and after existing "from" and "to" dates

If the "from" and "to" dates on the incoming record come before and after the "from" and "to" dates on the existing record for the same address type selected, then APPCUPD makes the existing record inactive and inserts the incoming record into the Banner tables.

Example

Incoming record:	From date	=	01-MAY-1979
	To date	=	01-MAY-1982
Existing record:	From date	=	01-JAN-1980
	To date	=	01-JUN-1981

Result:

New record:	From date	=	01-MAY-1979
	To date	=	01-MAY-1982
Inactive existing record:	From date	=	01-JAN-1980
	To date	=	01-JUN-1981

Incoming "from" and "to" dates cross over dates on two other records

If the "from" date on the incoming record comes between the "from" and "to" dates of an existing record of the same address type, and the "to" date comes between the "from" and "to" dates of a different existing record with the same address type selected, then APPCUPD does the following:

- Changes the "to" date on the first existing record to be one day before the "from" date on the incoming record

- Inserts the incoming record without changing it

- Changes the "from" date on the second existing record to be one day after the incoming record's "to" date

Example

Incoming record:	From date	=	01-MAY-1980
	To date	=	01-MAY-1982
Existing record 1:	From date	=	01-JAN-1980
	To date	=	01-JUN-1981
Existing record 2:	From date	=	02-JUN-1981
	To date	=	End of time

Result:

Updated existing record 1:	From date	=	01-JAN-1980
	To date	=	30-APR-1980
New record:	From date	=	01-MAY-1980
	To date	=	01-MAY-1982
Updated existing record 2:	From date	=	02-MAY-1982
	To date	=	End of time

Incoming date range includes existing date range

If the incoming record contains the entire date range of the existing record for the same address type selected, then APPCUPD inserts a new record for the incoming address and changes the "to" date on the incoming address.

Incoming record:	From date	=	01-FEB-2000
	To date	=	End of time
Existing record:	From date	=	01-APR-2000
	To date	=	End of time

Result:

New record:	From date	=	01-FEB-2000
	To date	=	31-MAR-2000
Existing record:	From date	=	01-APR-2000
	To date	=	End of time

Existing address with some null fields

If an existing address record has some fields that are null and an incoming record has information that would update those fields, where both have the same address type selected, then APPCUPD updates the existing record with the new information.

Example

The existing record includes street line 1, city, state, and ZIP code. The incoming record includes the same information plus street line 2 and country. The existing record is updated to include street lines 1 and 2, city, state, ZIP code, and country.

Technical considerations

The following processing tips apply to APPCUPD.

Loading data

You must do the following when you load information with APPCUPD:

- Verify that the input file is in ASCII or .csv format.

- Use the File Transfer Process (FTP) to transfer the file in ASCII mode via a Secure File Transfer to a directory that Banner can read from and write to. This directory depends on your operating system. This location is entered as one or more APPCUPD parameters (depending on the length of the data file path).

- Save your file as a .dat file. Enter the new name as a parameter for APPCUPD.

Header record

The file might begin with a header record containing information provided by the vendor:

- If your file is character delimited, APPCUPD ignores the header record.

- If your file is fixed length, APPCUPD tries to load the first line in the file. You should manually delete the header record before running APPCUPD.

Dates

APPCUPD recognizes all potential Oracle date formats for the date on the input file. APPCUPD uses the following logic to determine the file source date:

- APPCUPD first checks the Data Field Position Rules Form (AGATPFD) for the file definition selected. If the mapping contains a reference to SOURCE_ACT_DATE, this value is used for the file source date.

- If AGATPFD does not contain a reference to SOURCE_ACT_DATE, APPCUPD checks the value in the File Source Date parameter for a date entry. If defined, this value is used for the file source date.

- If neither of the previous checks provides a value, the system date when the run is executed is used as the file source date.

Load third-party gifts

The External Gift Load Process (AGPEXGF) loads gift and pledge payment details from third-party processors into Banner, ensuring the safe handling of payment card and ACH transactions that are received from PCI-compliant payment card processing services.

Before loading data, you must perform the setup steps described in .

Record types

The data load files used with AGPEXGF must have at least two records for each gift that is being loaded. The first record includes base information for the gift. The other records include details for each campaign/designation combination in the gift. You must define the format of the base and detail record types on the Data Field Position Rules Form (AGATPFD).

Base record (record number 01)

The base record type is identified on AGATPFD by entering *01* in the **Record Number** field. The following fields must be included in the file definition:

```
BAN_ID (for authenticated gifts)
EXT_GIFT_EXT_GIFT_ID
EXT_GIFT_REC_NUM
EXT_GIFT_AMT_TOT
EXT_GIFT_GIFT_CODE
```

Optional fields can also be included in the file definition. See "Data that can be loaded" on page 2-106 for additional fields that can be loaded. Note the following:

- If `EXT_GIFT_GIFT_DATE` (gift date) is not included in the base record, AGPEXGF uses the current system date when gifts are loaded.

- If `EXT_GIFT_ENTRY_DATE` (gift entry date) is not included in the base record, AGPEXGF uses the current system date when gifts are loaded.

- If the `EXT_GIFT_CASHIER` (cashier) field is not included in the base record, AGPEXGF uses the ID of the person who runs AGPEXGF.

Detail record (record number 02)

The detail record type is identified on AGATPFD by entering *02* in the **Record Number** field. The following fields must be included in the file definition:

```
BAN_ID
EXT_GIFT_EXT_GIFT_ID
EXT_GIFT_REC_NUM
EXT_GIFT_CAMPAIGN
EXT_GIFT_DESG
EXT_GIFT_DESG_AMT
```

Format of the data load file

The following sections provide more details on the format of the data load files used with AGPEXGF. A data load file can be character delimited or fixed length, depending on how the file is defined on the Data File Validation Form (ATVTAPE).

Character delimited data load file

A character delimited file uses a special character (for example, a comma) to separate each field in a record. The following illustration shows a sample character delimited data load file. Each gift must have one base record (01) and one or more detail records (02).

```
SCOOTER67,A0000016,01,200.10,ABC123,REF1234567890,SGEISER,In Memory,26-SEP-2008,HONR,MEMY,,CC,Scooter's Credit Card,24-SEP-2008,N,WWW,ABUS,AFS,510000001
SCOOTER67,A0000016,02,0000000,NOR,NORD,100.06
SCOOTER67,A0000016,02,0000000,NOR,UNRES,100.04
206745555,A0000017,01,300.00,ABC123,REF1234567892,GSMITH,In Memory of Mary,,HONR,MEMY,ANON,CC,,,N,WWW,ABUS,AFS,206743333
206745555,A0000017,02,0000252,NOR,NORD,150.00
206745555,A0000017,02,0000253,NOR,ATHLS,250.00
206744444,A0000018,01,450.00,ABC123,REF1234567893,GSMITH,,01-OCT-2008,,,,CC,Credit Card,02-OCT-2008,N,WWW,ABUS,AFS,206743383
206744444,A0000018,02,,NOR,BLCHR,100.00
206744444,A0000018,02,,NOR,ATHLS,200.00
206744444,A0000018,02,,NOR,NORD,150
206744444,A0000019,01,500.00,ABC123,REF1234567894,GSMITH,,01-OCT-2008,,,,CC,Credit Card,02-OCT-2008,N,WWW,ABUS,AFS,206743383
206744444,A0000019,02,,NOR,BLCHR,500.00
```

The following figure shows a sample AGATPFD definition for the base record (record number 01) for a character delimited data load file:

The following figure shows a sample AGATPFD definition for the detail record (record number 02) for a character delimited data load file:

The following fields are entered on AGATPFD for a character delimited data load file:

Field	Description
File Code	Code that identifies the data load file definition. This code is defined on ATVTAPE.
Record Number	Record type that is being defined:
	01 Base record
	02 Detail record
File Process	Banner process (*AGPEXGF*) associated with the data load file. The process for the file code is defined on ATVTAPE. Display only.
File Delimiter	Character that separates each field in the record. This character is defined on ATVTAPE. Display only.
Field Name	Name that identifies the data field in Banner.
Field Number	Position on the file where the field is located.
Occurrence	Blank. AGPEXGF does not support repeating data fields.
Activity Date	Date when the record was created or last changed. Display only.

Fixed length data load file

A fixed length file uses a predetermined, constant size for each field in a record. The following illustration shows a sample fixed length data load file. Each gift must have one base record (01) and one or more detail records (02).

```
SCOOTER67 9990022 01        200.10 ABC123 REF1234567890 SGEISER In Memory of Mary 26-SEP-2008 HONR MEMY ANON CC Scooter's Credit Card 24-SEP-2008 N WWW ABUS AFS 510000001
SCOOTER67 9990022 02 0000000 NOR   NORD             100.06
SCOOTER67 9990022 02 0000000 NOR   UNRES            100.04
206743333 9990023 01        300.00 ABC123 REF1234567891 SGEISER In Memory of Mom  26-SEP-2008 HONR MEMY ANON CC                        24-SEP-2008 N WWW ABUS AFS 510000001
SCOOTER67 9990023 02 0000000 NOR   NORD             100.00
SCOOTER67 9990023 02 0000000 NOR   UNRES            200.00
206743333 9990024 01        150.00 ABC123 REF1234567891 SGEISER                   26-SEP-2008 HONR MEMY ANON CC                        24-SEP-2008 N WWW ABUS AFS 510000001
SCOOTER67 9990024 02 0000000 NOR   NORD             150.00
```

The following figure shows a sample AGATPFD definition for the base record (record number 01) for a fixed length data load file.

The following figure shows a sample AGATPFD definition for the detail record (record number 02) for a fixed length data load file.

The following fields are entered on AGATPFD for a fixed length data load file:

Field	Description
File Code	Code that identifies the data load file definition. This code is defined on ATVTAPE.
Record Number	Record that is being defined: *01* Base record *02* Detail record
File Process	Banner process (*AGPEXGF*) associated with the data load file. The process for the file code is defined on ATVTAPE. Display only.

Field	Description
File Delimiter	Blank for a fixed length data load file.
Field Name	Name that identifies the data field in Banner.
Start	Starting position of the data field in a file (provided by the third-party processor).
End	Ending position of the data field in a file (provided by the third-party processor).
Occurrence	Blank. AGPEXGF does not support repeating data fields.
Activity Date	Date when the record was created or last changed. Display only.

Data that can be loaded

AGPEXGF can load the following data into Banner. The ATVTPFD field names are used to define the file layout on the Data Field Position Rules Form (AGATPFD).

The following fields can be loaded in the base record (01):

ATVTPFD Field Name	Description	Required
BAN_ID	Banner ID	P
EXT_GIFT_AMT_TOT	External gift amount	P
EXT_GIFT_CARD_AUTH_CODE	External gift payment card transaction authorization code	
EXT_GIFT_CARD_REFR_NUMBER	External gift payment card transaction reference number	
EXT_GIFT_CASHIER	External gift cashier	
EXT_GIFT_COMMENT	External gift comment	
EXT_GIFT_ENTRY_DATE	External gift entry date	
EXT_GIFT_EXT_GIFT_ID	External gift identifier	P
EXT_GIFT_GCLS_CODE_1	External gift class 1	
EXT_GIFT_GCLS_CODE_2	External gift class 2	
EXT_GIFT_GCLS_CODE_3	External gift class 3	

ATVTPFD Field Name	Description	Required
EXT_GIFT_GIFT_CODE	External gift type	P
EXT_GIFT_GIFT_DATE	External gift date	
EXT_GIFT_GIFT_DESC	External gift description	
EXT_GIFT_MATCH_RECEIVED	External gift match form received	
EXT_GIFT_PGVE_CODE	External gift giving vehicle code	
EXT_GIFT_REC_NUM	External gift record number (*01* for base record)	P
EXT_GIFT_SOLC_CODE	External gift solicitation code	
EXT_GIFT_SOL_ID	External gift solicitor Banner ID	
EXT_GIFT_SOL_ORG	External gift solicitor organization	

The following fields can be loaded in the detail record (02):

ATVTPFD Field Name	Description	Required
BAN_ID	Banner ID	P
EXT_GIFT_CAMPAIGN	External gift campaign	✓ (at least one)
EXT_GIFT_DESG	External gift designation	✓ (at least one)
EXT_GIFT_DESG_AMT	External gift designation amount	✓ (at least one)
EXT_GIFT_EXT_GIFT_ID	External gift identifier	P
EXT_GIFT_PLEDGE_NO	External gift pledge number	
EXT_GIFT_REC_NUM	External gift record number (*02 for detail record*)	P

The following fields are available in order to load unauthenticated gifts. Values in these fields, if supplied, are populated in the APBWIDN table for temporary storage until the data is posted to the proper Banner Advancement tables.

Using the following chart to add the fields to your file definition. These values can be added using the drop-down list on AGATPFD, which validates against ATVTPFD. These values can be added in any order.

APBWIDN Name	Required or optional	Comment	ATVTPFD Name
APBWIDN_ID	Required	Web ID created by a user not found in Banner.	BAN_ID
APBWIDN_LAST_NAME	Conditionally required	Last Name of donor with no Banner PIDM. This field is used to determine if an unauthenticated gift is being processed. If not found (either because an invalid PIDM was supplied or no PIDM was supplied and this field is blank) an error will be received. This field is only required for gifts coming in without a valid Banner PIDM (APBWIDN_ID value), thus is conditionally required.	NAME_LAST
APBWIDN_FIRST_NAME	Optional, but highly recommended	First Name of donor with no Banner PIDM. Optional, but highly recommended if incoming gift is for a constituent not in Banner Advancement.	NAME_FIRST
APBWIDN_MI	Optional	Middle Name of donor with no Banner PIDM.	NAME_MIDDLE

APBWIDN Name	Required or optional	Comment	ATVTPFD Name
APBWIDN_ATYP_CODE	Optional	Address Type of donor with no Banner PIDM. A parameter has been added to AGPEXGF so this field can be defaulted in if an unauthenticated gift record contains no value in this field. Logic was added to make sure the value coming in is a valid type code in Banner. Validates against ATVATYP.	ADDR_CODE
APBWIDN_STREET_LINE1	Optional, but highly recommended if incoming gift is for a constituent not in Banner Advancement.	Street Line 1 of donor with no Banner PIDM.	ADDR_STREET1
APBWIDN_STREET_LINE2	Optional	Street Line 2 of donor with no Banner PIDM.	ADDR_STREET2
APBWIDN_STREET_LINE3	Optional	Street Line 3 of donor with no Banner PIDM.	ADDR_STREET3
APBWIDN_CITY	Optional, but highly recommended if incoming gift is for a constituent not in Banner Advancement.	Address City of donor with no Banner PIDM.	ADDR_CITY

APBWIDN Name	Required or optional	Comment	ATVTPFD Name
APBWIDN_STAT_CODE	Optional. However, it is required on AGAWGIF for addresses in the U.S.A.	Address State of donor with no Banner PIDM. Logic was added to make sure the value coming in is a valid state code in Banner. Validates against STVSTAT.	ADDR_STATE
APBWIDN_ZIP	Optional. However, it is required on AGAWGIF for addresses in the U.S.A.	Address Zip/Postal Code of donor with no Banner PIDM.	ADDR_ZIP,ADDR_ZIP4, ADDR_ZIPC
APBWIDN_NATN_CODE	Optional. However, it is required on AGAWGIF for addresses **outside** the U.S.A.	Address Nation of donor with no Banner PIDM. Logic was added to make sure the value coming in is a valid nation code in Banner. Validates against STVNATN.	ADDR_COUNTRY
APBWIDN_TELE_CODE	Optional	Telephone Type of donor with no Banner PIDM. A parameter has been added to AGPEXGF so this field can be defaulted in if an unauthenticated gift record contains no value in this field. Logic was added to make sure the value coming in is a valid type code in Banner. Validates against STVTELE.	PHONE_CODE
APBWIDN_PHONE_AREA	Optional	Phone Number Area Code of donor with no Banner PIDM.	PHONE_ALL,PHONE_AREA

APBWIDN Name	Required or optional	Comment	ATVTPFD Name
APBWIDN_PHONE_NUMBER	Optional	Phone Number of donor with no Banner PIDM.	PHONE_ALL,PHONE
APBWIDN_PHONE_EXT	Optional	Phone Number Extension of donor with no Banner PIDM.	PHONE_EXT
APBWIDN_INTL_ACCESS	Optional	International Access Code of Phone Number of donor with no Banner PIDM.	PHONE_INTL_ACCESS
APBWIDN_EMAIL_ADDRESS	Optional	Email Address of donor with no Banner PIDM.	EMAIL
APBWIDN_EMAL_CODE	Optional	Email Code of donor with no Banner PIDM. A parameter has been added to AGPEXGF so this field can be defaulted in if an unauthenticated gift record contains no value in this field. Logic was added to make sure the value coming in is a valid type code in Banner. Validates against GTVEMAL.	EMAIL_CODE

APBWIDN Name	Required or optional	Comment	ATVTPFD Name
APBWIDN_DONR_CODE	Optional on the input file, but required to add a new constituent in Banner Advancement.	Donor Code of donor with no Banner PIDM. A parameter has been added to AGPEXGF so this field can be defaulted in if an unauthenticated gift record contains no value in this field. Logic was added to make sure the value coming in is a valid type code in Banner. Validates against ATVDONR.	DONOR_CODE
APBWIDN_CTRY_CODE_PHONE	Optional	Code designating the region or country.	PHONE_COUNTRY_CODE

Optionally, the following four parameters can be added before running the process via GJAPCTL.

APBWIDN Name	Comment	ATVTPFD Name
APBWIDN_ATYP_CODE	Address Type of donor with no Banner PIDM. A parameter has been added to AGPEXGF so this field can be defaulted in if an unauthenticated gift record contains no value in this field. Logic was added to make sure the value coming in is a valid type code in Banner. Validates against ATVATYP.	ADDR_CODE
APBWIDN_TELE_CODE	Telephone Type of donor with no Banner PIDM. A parameter has been added to AGPEXGF so this field can be defaulted in if an unauthenticated gift record contains no value in this field. Logic was added to make sure the value coming in is a valid type code in Banner. Validates against STVTELE.	PHONE_CODE

APBWIDN Name	Comment	ATVTPFD Name
APBWIDN_EMAL_COD E	Email Code of donor with no Banner PIDM. A parameter has been added to AGPEXGF so this field can be defaulted in if an unauthenticated gift record contains no value in this field. Logic was added to make sure the value coming in is a valid type code in Banner. Validates against GTVEMAL.	EMAIL_CODE
APBWIDN_DONR_COD E	Donor Code of donor with no Banner PIDM. A parameter has been added to AGPEXGF so this field can be defaulted in if an unauthenticated gift record contains no value in this field. Logic was added to make sure the value coming in is a valid type code in Banner. Validates against ATVDONR.	DONOR_CODE

Steps

Use the following steps to load gift details from third-party processors into Banner:

- Step 1, "Run the External Gift Load Process (AGPEXGF) in report mode"
- Step 2, "Review the output report"
- Step 3, "Run the External Gift Load Process (AGPEXGF) in update mode"
- Step 4, "Review and load the records into permanent Banner tables"

The following sections provide detailed instructions for each step.

Step 1   Run the External Gift Load Process (AGPEXGF) in report mode

Run the External Gift Load Process (AGPEXGF) in report mode. This allows you to test the data load without changing any data in Banner.

AGPEXGF is run from the Process Submission Controls Form (GJAPCTL) with the following parameters:

Parameter		Description
01	File Code	File code for the appropriate data source. Select List or the **Values** pull-down arrow to see valid values from the Data File Validation Form (ATVTAPE). Required.
02	Data Source Identifier	Code that identifies the third-party processor. Select List or the **Values** pull-down arrow to see valid values from the Data Source Identifier Validation Form (ATVDSRC). Required.
03	Data File Name	Exact name of the file sent by the vendor. Required.
04	Path of Data File - Part 1	Directory where the data file is located. This must be a location where Banner can access it. If the data file path is longer than 30 characters, parameters 05 and 06 are available for additional data file path details. Required.
05	Path of Data File - Part 2	Additional details (up to 30 characters) for the directory where the data file is located. Used with parameter 04 when the data file path is longer than 30 characters. This entry is concatenated to the end of the details entered in parameter 04. Optional.
06	Path of Data File - Part 3	Additional details (up to 30 characters) for the directory where the data file is located. Used with the parameters 04 and 05 when the data file path is longer than 60 characters but less than 91 characters. This entry is concatenated to the end of the details entered in parameter 05. Optional.
07	Report/Update Mode	Code that determines whether the database is updated when the process is run:
		R Print report; do not update database (default).
		U Print report; update database.
08	Date Format	Date format that overrides the system-defined date format for this execution of AGPEXGF. Must be a valid Oracle date format. Used solely to evaluate incoming dates and load details to Banner. Optional.

Parameter		Description
09	Header Record Exists	Code that indicates whether the data load file includes a header record:
		Y Header exists (default).
		N Header does not exist.
10	Sort Order	Report sort order:
		1 ID (default)
		2 Name (last, first, middle)
		3 External gift ID

For more information about AGPEXGF, refer to the *Banner Advancement User Guide*.

Step 2   Review the output report

Review the details on the AGPEXGF output report. The report heading identifies the third-party processor and the sort order. The report body includes two sections for each gift:

- The base section includes information such as the donor's Banner ID, Banner gift ID, external gift ID, gift type, giving vehicle, gift date, and total gift amount.

- The detail section includes each campaign/designation combination in the gift and the associated amount.

If an error occurs, an error message is displayed below the record where the error occurred. The following conditions result in an error message:

- Information is missing or invalid.

- Total gift amount does not equal the sum of detail gift amounts.

Records with errors are *not* loaded to Banner. These records must be corrected in the data load file or manually loaded into Banner.

```
                              Watermark University                                    PAGE      1
                           External Gift Load Process                                 AGPEXGF
                               Gifts from All, Inc
                          Report Only - Banner ID Order

Banner ID Name

999744444 Geiser, Donald

     Banner Gift Number:     REPORT              External Gift ID:      THREE
     Gift Type:              CC - Credit Card    Giving Vehicle:        WWW - Web Credit Card
     Gift Date:              02-OCT-2008         Gift Classes:
     Total Gift Amount:      $450.00
     Gift Entry Date:        01-OCT-2008
     Authorization Code:     ABC123
     Reference Number:       REF1234567890
     Match Form Received:    N                   Solicitation:          ABUS - Area Business Appeal
     Cashier:                GSMITH              Solicitor Organization: AFS - Annual Fund Solicitors
     Comment:                                    Solicitor:             999743383
     Errors:         Solicitor ID does not exist in Banner.

     Pledge Number           Campaign                        Designation                      Detail Amount
     0000000                 NOR - Norton Building Campaign  ATHLS - Athletic Scholarships with a    $200.00
                                                             really, really, really long
     0000000                 NOR - Norton Building Campaign  BIMED - Biomedical Research Center      $150.00
     0000000                 NOR - Norton Building Campaign  BLCHR - Bleachers Restoration Fund      $100.00

999745555 Geiser, George

     Banner Gift Number:     REPORT              External Gift ID:      TWO
     Gift Type:              CC - Credit Card    Giving Vehicle:        WWW - Web Credit Card
     Gift Date:              24-SEP-2008         Gift Classes:          HONR - In Honor of
     Total Gift Amount:      $300.00                                    MEMY - Memorial
     Gift Entry Date:        36-SEP-2008                                ANON - Anonymous
     Authorization Code:     ABC123
     Reference Number:       REF1234567890
     Match Form Received:    N                   Solicitation:          ABUS - Area Business Appeal
     Cashier:                GSMITH              Solicitor Organization: AFS - Annual Fund Solicitors
     Comment:                In Memory of Mary   Solicitor:             999743333 - Geiser, S Craig
     Errors:         Invalid Gift Entry Date.

     Pledge Number           Campaign                        Designation                      Detail Amount
     0000000                 EXCEL - Campaign for Excellence & A  BLCHR - Bleachers Restoration Fund   $150.00
     Errors:         Invalid Campaign and Designation Combination.
     0000000                 NOR - Norton Building Campaign   ATHLS - Athletic Scholarships with a     $250.00
                                                              really, really, really long
     Errors:         Detail amounts do not equal the Total Gift Amount.
```

```
13-OCT-2008                              Watermark University
Release 8.1                         External Gift Load Process
                                          Gifts from All, Inc
                                   Report Only - Banner ID Order


Banner ID Name


                                * * * REPORT CONTROL INFORMATION * * *
                                         parameter Message

USER:................. SGEISER


Parameter Name         Value                              Message
                       _____

File Code                          203421
Data Source Identifier             EXT_GIFTS
Data File Name                     GIFTCO
Path of Data File - Part 1         external_gifts.csv
Path of Data File - Part 2         /export/home/sgeiser/
Path of Data File - Part 3         rel81/xsd/
[R]eport/(U)pdate Mode             R
Date Format                        DD-MON-YYYY
Header Record Exists               N
Sort Order                         1
Line Count                         55
```

Step 3   Run the External Gift Load Process (AGPEXGF) in update mode

Run AGPEXGF as described in step 1, except enter *U* (update) as parameter 07 rather than *R* (report). In update mode, AGPEXGF loads the gift data into temporary tables.

Step 4   Review and load the records into permanent Banner tables

Use the following steps to review the third-party gifts and move them from the temporary tables into permanent Banner tables.

1. Access the Review External Gifts Form (AGAWGIF).

2. Enter the ID whose external gifts you want to review.

3. Go to the Gift Details block.

4. Review the gift details and make any changes, if necessary.

5. Select the **OK to Load** check box to approve the record.

6. Select Save.

7. Select Create Gift from the Options menu to remove the record from the temporary table, load the approved record into the permanent Banner tables, and refresh AGAWGIF.

Optionally, the **Gift List Tab** allows you to view a list of the gifts along with a count of the gifts, specify which gifts should be loaded and reviewed and subsequently load all gifts, thereby bypassing the individual review process.

In addition to displaying attributes that can also be viewed on the **Gift Details tab**, the **Gift List tab** contains options that allow you to control the display of the list and determine what action should be performed. These options include the following:

Option	Description
Create Gifts	Selecting this option allows you to load gifts for all gift transactions that have the **Load** check box checked.
Check All / Uncheck All	When the **Check All** check box is checked, the **Load** check box will be checked for all transactions, except those that have the **Review** check box checked. Any transaction that has the Review check box checked must have the **Load** check box checked manually.
	When the **Check All** check box is checked, the list will re-sort and all transactions with the **Load** check box checked will appear at the top of the list. Any transactions that have the **Review** check box checked will sort to the bottom of the list.
	The **Check All** an **Uncheck All** check boxes only dictate how transactions that appear on the Gift List will behave. These options do not apply to the Oracle query function.
Load	If this check box is checked, the gift transaction will be loaded when the **Create Gifts** option is selected. Transactions that do not have this check box checked will not be loaded. This check box is unchecked by default. This check box can be populated manually or via the **Check All** or **Uncheck All** options.
Review	When the batch posting routine occurs, any transactions that could not be posted will have a status of Review Required. This is indicated by a check in this column and serves as an indication something needs to be fixed prior to being posted successfully.
	When this occurs, depending on the rules at your institution, you could either view this gift on the **Gift Detail tab**, fix the changes and attempt to post it there, or fix the issues on the **Gift Detail tab** and defer the posting of this gift until the next run on the **Gift List tab.**

Technical considerations

The following processing tips apply to AGPEXGF.

Loading data

You must do the following when you load third-party gifts with AGPEXGF:

- Verify that the input file is in ASCII format.

- Make sure there are no blank lines in the data load file. The file cannot be loaded if it contains blank lines.

- Use the File Transfer Process (FTP) to transfer the file in ASCII mode via a Secure File Transfer to a directory that Banner can read from and write to. This directory depends on your operating system. This location is entered as one or more AGPEXGF parameters (depending on the length of the data file path).

- Enter the file name as an AGPEXGF parameter.

Header record

If the file begins with a header record that contains information provided by the third-party processor, set parameter 09 (Header Record Exists) to *Y*. With this setting, AGPEXGF ignores the first record.

Dates

AGPEXGF recognizes all potential Oracle date formats for dates on the data load file. If parameter 08 (Date Format) is defined, this format is used for dates. If the parameter is not defined, the format of the current system date is used for dates.

3 Data Transfers Using the Advancement Connector

The Advancement Connector is a Banner® Advancement module that uses Web services to transfer data between Banner and partner products. This chapter provides instructions for loading data between Banner Advancement and Encompass, a Web-based social networking tool available from iModules.

> **Note**
>
> Although this chapter targets integration between Banner Advancement and iModules Encompass, the Advancement Connector has a flexible design that can be used to integrate Banner Advancement with other partner products. Refer to the *Advancement Connector Developer's Guide* for details on how to integrate Banner Advancement with other partner products. ∎

Integration with iModules Encompass

The Advancement Connector uses Web services to share constituent data between your Banner database and the Encompass database. Shared data can include member, contact, education, spouse, family, business, activity, and honors information. Specific Banner database fields are mapped to specific Encompass database fields to ensure the integrity of both databases. See Appendix A, "Advancement Connector Data Mappings" for a list of the supported data mappings.

Data transfer between Banner and Encompass keeps both databases up-to-date and accurate. There are two ways to transfer data:

- **Push** - You can collect changes in your Banner database and *push* them to the Encompass database.

- **Pull** - You can collect changes in the partner database and *pull* them to the Encompass database.

Processing overview

Banner is the master repository for constituent data. Pushing Banner data changes to Encompass allows constituents to view their data in Encompass. Pulling Encompass data

changes to Banner keeps the master repository current. This two-way transfer ensures the integrity of both databases.

Information in Banner and Encompass might never be identical. For example, a constituent might change an address in Encompass immediately after changes are pulled to Banner. The constituent change would not be reflected in Banner until the next pull was performed. Your synchronization schedule determines the level of accuracy in each database. You should choose a frequency that is appropriate for your institution.

The following sections provide an overview of the synchronization of data between Banner and Encompass.

Data that can be synchronized

Specific Banner database fields can be synchronized with specific Encompass database fields. The Advancement Connector Data Mapping Form (AUACMAP) is delivered with all data mappings that baseline Banner Advancement supports. Each mapping indicates whether the data can be pushed to Encompass and/or pulled from Encompass.

You can create additional data mappings on AUACMAP if you want to synchronize other database fields. The baseline code, however, cannot process these additional data mappings. Your institution must make all coding changes (tables, forms, packages, and so on) needed to support the synchronization of additional database fields.

Profiles

Profiles identify the specific Banner database fields that your institution wishes to synchronize with Encompass database fields. You need separate profiles for push and pull processing.

Banner Advancement delivers profiles as seed data. You can also copy, create, modify, and delete profiles.

Push processing flow

The following processing flow occurs when you push information from Banner to Encompass.

1. A Banner administrative user initiates push processing on the Advancement Connector Initiation Form (AUAINIT). This form identifies the profile and the date/ time parameters that are used to select the data that will be pushed. Optionally, the

Scheduler Tab allows your institution to set predefined schedules for the automatic running of push and pull profiles.

2. Banner Advancement performs the following processing:

    2.1. Evaluates advancement constituents in the Banner database and selects data changes that were made to the profile data elements and have an activity date in the specified date range.

    If an activity date contains a date only (no time), only the date parameter on AUAINIT is used to determine whether the data change is pushed.

    For repeating data elements (such as degree majors, interest codes, and activity codes), the six newest records, based on activity date, are selected. For example, if an interest code is added or changed, the six newest interest codes are selected for the push.

    2.2. Collects the data changes into the AUBTROT table and organizes them into batches. A push transaction can have more than one batch.

    2.3. Calls the iModules Web service for each batch in the push transaction.

3. The iModules Web service performs the following processing for each batch in the push transaction:

    3.1. Updates the Encompass database with the changes extracted from Banner.

    3.2. Sends a response to Banner that indicates whether the push was successful or had errors on the Encompass side.

4. The Banner administrative user views the push status and any messages from Encompass on the Run History tab of the Advancement Connector Initiation Form (AUAINIT).

For additional information on push processing, please refer to "Push data from Banner to Encompass" on page 3-19.

Pull processing flow

The following processing flow occurs when you pull information from Encompass to Banner.

1. A Banner administrative user initiates pull processing on the Advancement Connector Initiation Form (AUAINIT). This form identifies the profile and the date/time parameters that are used to pull data. Optionally, the Scheduler Tab allows your institution to set predefined schedules for the automatic running of push and pull profiles.

2. Banner Advancement calls the iModules Web service for each batch.

3. The iModules Web service performs the following processing:

   3.1. Evaluates the Encompass database to determine the appropriate updates to include in the Web service response, based on the data elements in the pull profile.

   3.2. Returns the data to Banner with a response message that indicates whether the pull was successful or had errors on the Encompass side.

4. For BIOGRAPHIC PULLS ONLY, Banner Advancement collects the constituents' pulled data elements in the AUBTRIN table. Both changed data elements and context data elements are stored in the table. Changed data elements are flagged with an asterisk. A Banner administrative user performs the following tasks:

   4.1. Views the pull status and any messages from Encompass on the Run History tab of the Advancement Connector Initiation Form (AUAINIT).

   4.1. Uses the Advancement Connector Review Form (AUACRVW) to compare Encompass data changes with existing Banner data, accept or reject the data changes, and post the approved changes to Banner.

5. For GIFT PULLS ONLY, Banner Advancement collects the appropriate gift-related data. Any errors associated with the pull can be viewed on the Run History tab of AUAINIT. The actual review and posting of pulled gifts is performed in AGAWGIF.

For additional information on biographic pull processing, please refer to .

For additional information on gift pull processing, please refer to .

Set up the Advancement Connector

Integration between Banner and Encompass requires the following setups.

Step 1   Establish a relationship with iModules

The Advancement Connector for Encompass is included in the Banner Advancement baseline license. In order to use this functionality, an Encompass account must be established with Encompass. A client must contract with Encompass for the implementation of the Encompass Connector and access to the iModules web services. Please contact your iModules Account Manager for the necessary work order agreement.

Step 2 Install and configure the Advancement Connector

Ensure that your system administrator has installed the Advancement Connector. Instructions are contained in the *Banner Advancement Connector Installation and Administration Guide.*

Once the Advancement Connector is installed, review the following configuration properties. These properties are configured with initial values that facilitate immediate data exchange with Encompass. In most cases, you do not need to change these values.

Property	Description	Initial Value
`connector.delimiter`	Delimiter character used to separate elements in data transfer files, when flat files are used for data upload	, (comma) (Required value for Banner/Encompass integration)
`connector.entityidlabel`	Column label for the entity identifier property when written to a delimited file format such as CSV	*SPRIDEN_PIDM* (Required value for Banner/Encompass integration)
`connector.implementationclass`	ConnectorService implementation loaded by the Factory The initial value should be changed only if you customize the Encompass connection or connect with a different partner system.	*com.sungardhe. banner.advancement. utility.connector. encompass. EncompassService*
`connector.writefilepath`	File directory or path on the application server where data transfer files are written when a flat file is used to transmit data Your institution's system administrator sets the value for this property and optionally makes this location available to the Banner Advancement administrative user who transfers data files to Encompass for upload.	*C:/advconnector/* (Assumes a Windows operating system)

Step 3 Configure Encompass properties

Review the following Encompass properties, which were configured during the installation process. The initial values provide a reasonable working environment for data exchange with Encompass. In most cases, you do not need to change these values.

Property	Description		Initial Value
encompass.debug	Flag that determines whether the Encompass service operations are in debug or operational mode:		false
	true	Debug mode	
	false	Operational mode	
	Keep the initial value unless your institution created a different implementation of an operation.		
encompass. allowaddconstituen ts	Flag that determines whether new Banner constituent records can be pushed to Encompass:		*true*
	true	Push new constituents to Encompass. Use this setting if you create new constituent records in Banner and you want to transfer these new constituents to Encompass.	
	false	Do not push new constituents to Encompass.	
	This property applies only to push and update transactions.		
encompass. batchsize	Maximum number of constituent records in a transfer batch. A constituent record can have any number of individual data changes. A transfer is divided into one or more batches, based on this property.		*1000*
	The initial value is *1000*, which iModules determined to be a reasonable starting value that balances data transfer size with performance of the Web service. You can change this value if the data transfer situation at your institution warrants it.		

Property	Description	Initial Value
`encompass.` `ignoremessages`	List of Encompass message codes that the Advancement Connector should ignore and not capture in the transfer status records or logs. If the list is empty, all messages are captured and recorded. This list does not apply to Encompass error codes, which are those elements found in the <Error> nodes of a response. **Note:** You can comment out this property to temporarily enable messages without deleting the list.	*2207*
`encompass.` `includeblankids`	Flag that determines whether constituent records are pulled if they do not have a constituent ID: *true* Pull records without a constituent ID. *false* Do not pull records without a constituent ID. This property applies only to pull and get member transactions. The Advancement Connector does not support the processing of constituents that do not have a Banner PIDM. Therefore, this property value should remain *false*, unless you customize the behavior of Banner Advancement and the Advancement Connector.	*false*
`encompass.` `includenonmembers`	Flag that determines whether constituent records are pulled if they are not members of the community in Encompass: *true* Pull non-members. *false* Do not pull non-members. This property applies only to pull and get member transactions.	*true*

Property	Description	Initial Value
encompass. timeout	Maximum number of seconds the service client waits for a response from the iModules Web service. This property is used with the batch size to provide optimum performance. The initial value is *90*, which iModules determined to be a reasonable starting value.	*90*

Step 4   Encrypt credentials

Ensure that your system administrator has encrypted your login and password credentials for the iModules Web service. Instructions are contained in the *Banner Advancement Connector Installation and Administration Guide*. This document also describes alternative configurations that provide different ways to protect the Encompass login and password credentials, depending on your institution's needs and security practices.

Step 5   Set the Advancement Connector URL in Banner

Use the following steps to set the URL that Banner uses to call the Advancement Connector.

1.   Access the Advancement Control Form (AGACTRL).

2.   Select the Institution tab

3.   Select the Connector Defaults sub-tab.

4.   Enter the base URL in the **Connector URL** field using this format:

```
http(s)://<server>:<port>/advconnector/init
```

5. Select values from the applicable drop-downs.

6. Save.

Step 6   Establish your push/pull schedule

Develop a push/pull schedule that is appropriate for your institution. Follow the schedule
rigorously to ensure data integrity. Your schedule might be daily, weekly, or some place
between. The more frequently the transfers occur, the smaller each data transfer will be.
Optionally, use the scheduler to set predefined schedules for the automatic running of push
and pull profiles.

Manage data mappings

Data mappings identify which Banner database fields are synchronized with which
Encompass database fields. The Advancement Connector Data Mapping Form
(AUACMAP) is delivered with all data mappings that baseline Banner Advancement
supports. Refer to Appendix A, "Advancement Connector Data Mappings" for a list of the
supported data mappings.

Create a local data mapping

You can create additional data mappings if you want to synchronize other database fields.
Baseline Banner, however, cannot process these additional data mappings. You must make
all coding changes to support the synchronization of additional database fields.

Use the following steps to create a local data mapping.

1. Access the Advancement Connector Data Mapping Form (AUACMAP).

2. Insert a new record.

3. Enter values in the following required fields:

Field	Description
Connector Name	Name of the data element in the Encompass database. Encompass expects this name when the data element is pushed or pulled.
Friendly Name	Label used in the Encompass user interface to identify the data element. This field is informational only.

Field	Description
Review Category	Review category code for the data element. Review categories organize the data elements that are synchronized between Banner and Encompass. Review categories correspond to the tabs that constituents see in the Encompass user interface.
Banner Table Name	Banner table where the data resides. When you create a local data mapping, this must be a valid Banner table.
Banner Column Name	Banner column where the data resides.When you create a local data mapping, this must be a valid column in the table identified in **Banner Table Name**.

4. If this is an active data mapping, select the **Active** check box.

   You can have multiple data mappings for a data element, but only one mapping can be active at any time. Only active data mappings can be included in profiles on the Advancement Connector Profile Form (AUACDEF).

5. Select the **Push Allowed** and/or **Pull Allowed** check box. At least one of the check boxes must be selected.

6. Save.

7. Enter information as necessary in the Valid Profile Categories data block. This data block allows you to associate each data element in the Data Elements data block to the appropriate Profile Categories. As you navigate between Data Elements, the values in the Profile Categories data block change in order to reflect the associations to the Data Element in context. For additional information, please refer to .

8. Make all necessary coding changes to support the new data mapping (tables, forms, packages, and so on).

Inactivate a data mapping

Data mappings delivered in baseline Banner cannot be deleted. You can, however, inactivate a baseline data mapping to prevent its use at your institution. Use the following steps to inactivate a data mapping.

1. Access the Advancement Connector Data Mapping Form (AUACMAP).

2. Select the record that you wish to inactivate.

3. Clear the **Active** check box.

4. Save.

Manage profiles

Profiles identify the specific Banner database fields that your institution wishes to synchronize with Encompass database fields. When you initiate a push or pull, you must specify the profile to be used.

Banner Advancement delivers baseline profiles as seed data on the Advancement Connector Profile Form (AUACDEF). These baseline profiles are meant to serve as a starting point for each supported type of push and pull. As you create your institution-specific profiles, the recommendation is to retain the original seed data profiles so you can refer back to them as necessary. Your institution should make copies of the seed data profiles and rename and customize them as applicable in order to expedite the profile creation process.

> 📄 **Note**
> BANNER PULL profile is the only seed data profile that can be used without modification. All other profiles must be configured by each institution prior to use. ■

Local profiles

If you want to push or pull selected data elements, you can create local profiles on AUACDEF for your institution. You can create brand new profiles, or you can copy existing profiles and add, modify, and delete data elements as desired.

The following general guidelines apply to local profiles:

- Push processing and pull processing require separate profiles.

- Only active data elements mapped on the Advancement Connector Data Mapping Form (AUACMAP) can be included in a profile.

- Only those data elements flagged for push processing can be included in push profiles. Similarly, only those data elements flagged for pull processing can be included in pull profiles.

Related data elements in pull profiles

When you create a local pull profile, you should include all data elements that are related to the data changes you want to pull. By pulling related data elements, you can see the context of the changes during the review process. You should also define a display order that groups related data elements together on the review form. For example, a profile that pulls preferred address changes should include all preferred address data elements and should specify a display order that groups these data elements together.

The following table identifies the related data elements for each type of data that can be pulled from Encompass:

Type of Pulled Data	Related Data Elements
Primary e-mail	Primary Email
	Primary Email Code
Business e-mail	Business E-mail
	Business E-mail Code
Preferred phone	Preferred Phone Type
	Preferred Phone Address Type (hidden) (optional)
	Preferred Phone Address Sequence Number (hidden) (optional)
	Phone Country Code (optional)
	Phone Area Code (optional)
	Phone Number
	Phone Extension (optional)
Business phone	Business Phone Type
	Business Phone Address Type (hidden) (optional)
	Business Phone Address Sequence Number (hidden) (optional)
	Business Phone Country Code (optional)
	Business Phone Area Code (optional)
	Business Phone Number
	Business Phone Extension (optional)
Preferred address	Address Status (hidden)
	Preferred Address Type
	Preferred Address 1
	Preferred Address 2
	Preferred Address 3
	Preferred Address 4
	House Number
	City
	State
	Zip
	Country
Business address	Business Address Status (hidden) (optional)
	Business Address Type
	Business Address 1
	Business Address 2
	Business Address 3
	Business Address 4
	Business House Number
	Business City
	Business State
	Business Zip
	Business Country

Type of Pulled Data	Related Data Elements
Home fax phone	Fax Phone Type (hidden) Fax Phone Address Type (hidden) (optional) Fax Phone Address Sequence Number (hidden) (optional) Fax Country Code (optional) Fax Area Code (optional) Fax Number Fax Extension (optional)
Business fax phone	Business Fax Phone Type (hidden) Business Fax Phone Address Type (hidden) (optional) Business Fax Phone Address Sequence Number (hidden) (optional) Business Fax Country Code (optional) Business Fax Area Code (optional) Business Fax Number Business Fax Extension (optional)
Employment	Employer Name (optional) Job Title (optional) Job Category (optional)

Selection values

Some data elements, when used in push profiles, use a selection value to ensure that the correct data is extracted and pushed to Encompass. The following table indicates whether a selection value is required or optional for these data elements:

Data Element	Selection Value Required	Selection Value Optional
Salutation Code	P	
Primary Donor Code		P
Preferred Address Type		P
Preferred Phone Type		P
Fax Phone Type	P	
Joint Salutation Code	P	
Maiden Name Type	P	
Business Email Code	P	
Business Address Type		P
Business Phone Type		P
Business Fax Phone Type	P	
Deceased		P

For example, if you create a profile that uses the Business Email Code data element, you must enter a selection value to identify which e-mail type should be extracted and pushed to Encompass as the business e-mail address.

A selection value can be entered for any data element in a push profile. However, selection values are supported only for those data elements that use a data element in baseline Banner. If your institution wants to use selection values for other data elements, you must make all coding changes to support this functionality.

Selection value for Primary Donor Code data element

By default, the baseline push profile updates data for all donor categories. If you want to limit updates to selected donor types, you can include the Primary Donor Code data element in the profile. Use the **Selection Value** field to identify the donor codes that should be included in the push. Multiple donor codes can be entered, each separated by a comma with no spaces. Push processing selects only those constituents whose primary donor code matches one of the codes in the **Selection Value** field. If the **Selection Value** field is left blank, all donor codes are selected. The primary donor code for each selected constituent is pushed to Encompass.

Example

To push updates for alumni and non-degree alumni only, include the following data element in the profile:

Connector Database Name:	Primary Donor Code
Selection Value:	ALND,ALUM

Only alumni and non-degree alumni are selected for the push. For each selected ID, the primary donor code is pushed to Encompass

Selection value for Deceased data element

By default, the baseline push profile updates data for both living and deceased constituents. If you want to limit updates to deceased constituents or living constituents, you can include the Deceased data element in the profile. Enter one of the following values in the **Selection Value** field to indicate which constituents should be included in the push:

blank	Include all living and deceased constituents in the push (default).
N	Include living constituents only in the push.
Y	Include deceased constituents only in the push.

Create a profile without copying

Use the following steps to create a new profile without copying an existing profile.

1. Access the Advancement Connector Profile Form (AUACDEF).

2. Enter a new profile code in the **Profile Code** field. Maximum length is 30 characters.

3. Press Tab. A popup window alerts you that your are creating a new profile.

4. Click **OK** in the popup window.

5. Enter a description of the profile in the **Profile Description** field. Maximum length is 60 characters.

6. Select a value (*PUSH* or *PULL*) from the **Transaction Type** drop-down list.

7. Go to the next block.

8. Use the following steps to add each data element to the profile:

    8.1. Select the name of an Encompass database field from the **Connector Name** drop-down list.

          The drop-down list for this field shows the active data elements that can be used in the profile. The list also indicates whether the database field requires a selection value.

8.2. If this is a push profile and the data element requires a selection value, enter the value in the **Selection Value** field. This field is not validated, so enter the value carefully.

A selection value is used by some data elements to extract and push the correct data to Encompass. Refer to <u>"Selection values" on page 3-13</u> for a list of data elements that require a selection value and a list of data elements that optionally use a selection value.

8.3. Enter a value in the **Display Order** field. The order must be unique for each data element. Maximum value is 9999.

This value determines the order in which data elements are displayed on AUACDEF when the form is refreshed. For a pull profile, this value also determines the order in which data elements are displayed on the Advancement Connector Review Form (AUACRVW).

9. When all data elements are entered, save.

Create a profile by copying

Use the following steps to create a new profile by copying an existing profile. Once you copy a profile, you can add, modify, and delete data elements as desired.

1. Access the Advancement Connector Profile Form (AUACDEF).

2. Enter a new profile code in the **Profile Code** field. Maximum length is 30 characters.

3. Press Tab. A popup window alerts you that your are creating a new profile.

4. Click **OK** in the popup window.

5. Enter a description of the profile in the **Profile Description** field. Maximum length is 60 characters.

6. Select a value (*PUSH* or *PULL*) from the **Transaction Type** drop-down list.

7. Select a profile code from the **Copy Profile Code** drop-down list. This is the profile that you want to copy.

   The drop-down list displays the existing profiles that you can copy. For a new push profile, the drop-down list displays existing push profiles. For a new pull profile, the drop-down list displays existing pull profiles.

8. Go to the next block. A popup window asks if you want to create a profile.

9. Click **Yes** in the popup window. A popup window confirms the copy.

10. Click **OK** in the popup window. Data elements for the copied profile are displayed in the Profile Details block.

11. To add a data element:

    11.1. Go to a blank row or insert a new record.

    11.2. Select the name of an Encompass database field from the **Connector Database Name** drop-down list.

    The drop-down list for this field shows the active data elements that can be used in the profile. The list also indicates whether the database field requires a selection value.

    11.3. If this is a push profile and the data element requires a selection value, enter the value in the **Selection Value** field. This field is not validated, so enter the value carefully.

    A selection value is used by some data elements to extract and push the correct data to Encompass. Refer to "Selection values" on page 3-13 for a list of data elements that require a selection value and a list of data elements that optionally use a selection value.

    11.4. Enter a value in the **Display Order** field. The order must be unique for each data element. Maximum value is 9999.

    This value determines the order in which data elements are displayed on AUACDEF when the form is refreshed. For a pull profile, this value also determines the order in which data elements are displayed on the Advancement Connector Review Form (AUACRVW).

12. To modify a data element, change the value in the **Connector Database Name**, **Selection Value**, or **Display Order** field as desired.

13. To delete a data element:

   13.1. Select the record to be deleted.

   13.2. Remove the record.

14. When you are done, save.

Modify a profile

Use the following steps to modify a profile.

1. Access the Advancement Connector Profile Form (AUACDEF).

2. Select the profile code from the **Profile Code** drop-down list.

3. (Optional) Modify the profile description in the **Profile Description** field. Maximum length is 60 characters.

4. Go to the next block.

Existing data elements are displayed. You can use the following steps to add, modify, and delete data elements, as desired.

5. To add a data element:

   5.1. Go to a blank row or insert a new record.

   5.2. Select the name of an Encompass database field from the **Connector Database Name** drop-down list.

   The list of values for this field shows the active data elements that can be used in the profile. The list also indicates whether the database field requires a selection value.

   5.3. If this is a push profile and the data element requires a selection value, enter the value in the **Selection Value** field. This field is not validated, so enter the value carefully.

   A selection value is used by some data elements to extract and push the correct data to Encompass. Refer to for a list of data elements that require a selection value and a list of data elements that optionally use a selection value.

5.4. Enter a value in the **Display Order** field. The order must be unique for each data element. Maximum value is 9999.

This value determines the order in which data elements are displayed on AUACDEF when the form is refreshed. For a pull profile, this value also determines the order in which data elements are displayed on the Advancement Connector Review Form (AUACRVW).

6. To modify a data element, change the value in the **Connector Database Name**, **Selection Value**, or **Display Order** field as desired.

7. To delete a data element:

7.1. Select the record to be deleted.

7.2. Remove the record.

8. When you are done, save.

Delete a profile

Use the following steps to delete a profile.

1. Access the Advancement Connector Profile Form (AUACDEF).

2. Select the profile code from the **Profile Code** drop-down list.

3. Go to the next block.

4. Remove each data element.

5. Save.

6. Roll back to the key block. A popup window alerts you that detail records do not exist.

7. Click **Yes** to delete the profile.

Push data from Banner to Encompass

The following tasks can be used to push data from Banner to Encompass.

📋 **Note**

To maintain data integrity, you must develop a push/pull schedule that is appropriate for your institution and follow the schedule rigorously. ■

Load initial data to Encompass

A lot of data must be loaded from Banner to Encompass when the integration is first implemented. To minimize network traffic and possible timeout, you should save the initial data load to a flat file. The Advancement Connector properties file identifies the file directory or path on the application server where this file is located.
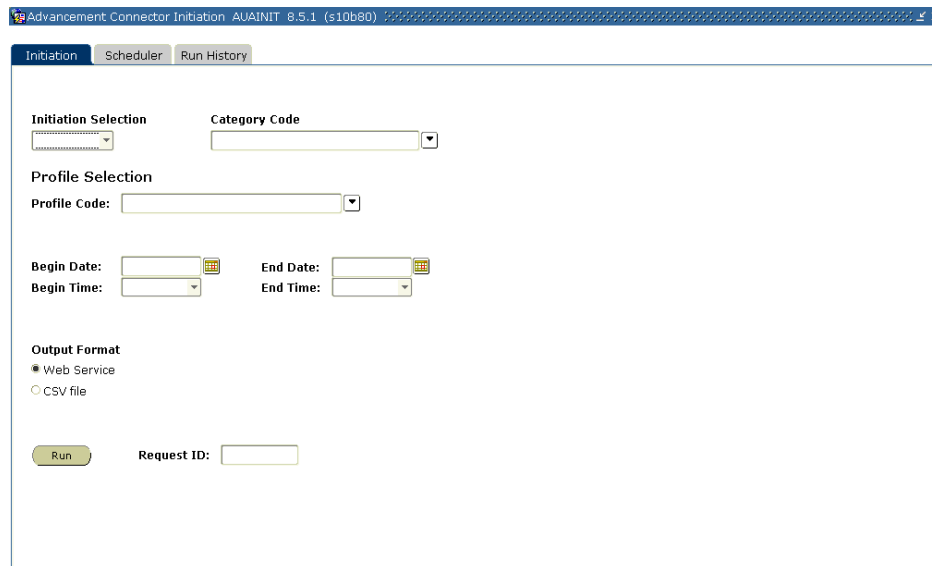
> 📝 **Note**
>
> You should always use a flat file, rather than the iModules Web service, to load large volumes of data. ∎

If you previously used local processes to integrate Banner with Encompass, you do not need to load data to Encompass. The only exception is if you plan to synchronize additional types of data. In this case, you should create a flat file that contains the new types of data only.

Use the following steps to create a flat file for the initial data load.

1. Access the Advancement Connector Initiation Form (AUAINIT).

2. Select *Push* from the **Initiation Selection** drop-down list.

3. Select a category code from the **Category Code** drop-down list.

   This code identifies the category of data elements (Biograpic or Gift) that will be extracted from Banner and pushed to Encompass.

4. Select a profile code from the **Profile Code** drop-down list.

   This code identifies the set of data elements that will be extracted from Banner and pushed to Encompass.

5. Enter a date in the **Begin Date** field.

Data changes with an activity date on or after this date will be selected. This date cannot be a future date.

6. (Optional) Select a time from the **Begin Time** drop-down list.

Data changes with a timestamp on or after this time will be selected.

7. Select the *CSV file* radio button in the **Output Format** field.

8. Enter the name of the output file in the **File Name** field. Maximum length is 30 characters.

An extension in the file name is optional. If no extension is entered, the default is .csv.

Do not include the path in the file name. The path is specified in the Advancement Connector properties file.

9. Click **Run**. When processing is completed, a popup window confirms that the request was initiated.

10. Click **OK** in the popup window.

The assigned ID is displayed in the **Request ID** field. The output file is written to the location specified in the Advancement Connector properties file.

11. Select the Run History tab to check the status of the push process.

Initiate a push process

Use the following steps to initiate a push process.

1. Access the Advancement Connector Initiation Form (AUAINIT).

2. Select *Push* from the **Initiation Selection** drop-down list.

3. Select a category code from the **Category Code** drop-down list.

   This code identifies the category of data elements (Biograpic or Gift) that will be extracted from Banner and pushed to Encompass.

4. Select a profile code from the **Profile Code** drop-down list.

   This code identifies the set of data elements that will be extracted from Banner and pushed to Encompass.

5. Enter a date in the **Begin Date** field.

   Data changes with an activity date on or after this date will be selected. This date cannot be a future date.

6. (Optional) Select a time from the **Begin Time** drop-down list.

   Data changes with a timestamp on or after this time will be selected.

7. Choose one of the following values in the **Output Format** field:

   Web Service - Use the iModules Web service to push data
   CSV file - Create a flat file of data changes

8. If you selected the CSV file format, enter the name of the output file in the **File Name** field.

   An extension in the file name is optional. If no extension is entered, the default is .csv.

   Do not include the path in the file name. The path is specified in the Advancement Connector properties file.

9. Click **Run**. When processing is completed, a popup window confirms that the request was initiated.
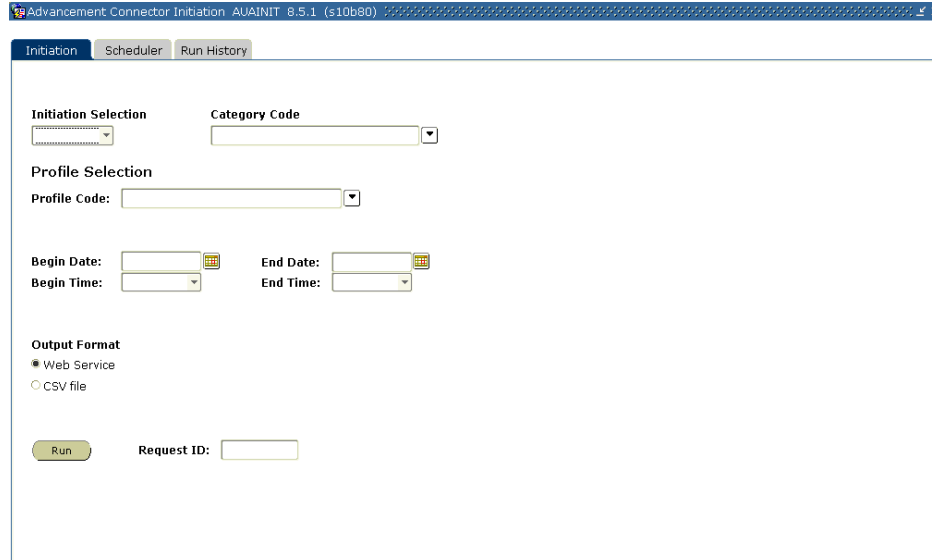
10. Click **OK** in the popup window. The assigned ID is displayed in the **Request ID** field.

11. Select the Run History tab to check the status of the push process.

   Each initiation request generates one or more batches of data to be synchronized. The number of batches depends on the number of transactions being processed and the batch size set in the Encompass properties file.

   💡 **Tip**

   > The best practice recommendation is to leave the **Begin Time** and **End Time** parameters blank. This will help ensure the desired results are selected.   ■

CSV file creation processing and logic

When deciding which **Output Format** (CSV file or Web Service) you wish to utilize, please note the following:

- In order to achieve efficiency for incremental data changes and efficiency for large data sets, the processing logic employs two different strategies for finding data for the different output formats. Using two different strategies means that each output format performs efficiently for its intended purpose.

  - The logic for a push with an Output Format = Web Service expects smaller amounts of data, typically updates that would occur over a day or over a week. It has been designed to select incremental data changes throughout the collection of advancement individuals efficiently.

  - The logic for a push with an Output Format = CSV file expects significantly larger amounts of data, especially given the primary usage of creating the initial files for iModules for data conversions and loads to Encompass. The logic for this scenario is designed to select data from the entire collection of advancement individuals efficiently.

- Once the qualifying profile data elements are selected to be included in the push, one processing step is to write these profile data elements to the transfer out table (AUBTROT). Profile data elements are written to the AUBTROT table only if the element contains data changes for an advancement individual. This substantially reduces the number of rows added to the table for each request. The reduced

number of rows in the table improves the performance of the process and reduces the overall database resources required by the process. When the data in AUBTROT will be written to a CSV file, the CSV file writing process ensures that all of the data elements in the profile have a column in the CSV file, and that all records have appropriate empty values for profile data elements where there were no data changes. This ensures that the CSV file retains the correct format.

• Sometimes, data values in the Advancement database can contain characters that are reserved characters in the CSV format, primarily the comma(','), double quote ('"'), and return/newline characters. In the CSV format, commas separate values, double quotes enclose values that may contain commas, and return/newline characters signal the end of a row in the file. The processing logic checks the data values coming from the Advancement database for these reserved characters. If a comma is present in the data value, the data value is enclosed in double quotes. Double quote characters in the data value are converted to single quote characters ('). Return/newline characters in the data values are removed, as are any leading or trailing spaces or tab characters.

If a Push request receives a status of 'No Changes', this means that there are no updates that qualify to be included in the push. If the Output Format is CSV File, no .csv file will be created. In this scenario, the 'No Changes' status communicates to the user that there were no updates to provide.

Best practice recommendations for Web Service pushes and CSV file creation

Use Web Service for incremental changes

For incremental data changes, the push to Encompass using the web service is efficient for relatively small amounts of data, representing the collection of changes to advancement individuals' data over periods of a day or a week. Accepting incremental data changes the design and purpose of the web service offered for the Encompass product. Most incremental pushes using the web service should complete in under a minute.

While the selection process for web service pushes is very efficient at collecting incremental data changes throughout the collection of advancement individuals, it is NOT efficient at collecting all of the data elements in a profile for every advancement individual in the collection. Therefore, your institution should not attempt to do a web service push with a profile containing many data elements where the date range selected would cause some or most of the data elements for every advancement individual in Banner Advancement to be selected for transfer to Encompass.

Use CSV file for large data sets

For initial data loads to Encompass, the push operation to create a CSV file is efficient for large amounts of data, representing all desired data elements for every advancement individual that will be transferred to Encompass. The total time to create a file with data for a large number of advancement individuals (51,000 individuals in SGHE's tests)

ranges from 1 to 2 hours. Larger numbers of advancement individuals will take proportionally longer, and smaller numbers will take proportionally less time.

The logic of the file creation operation is to check every single advancement individual in Advancement for data changes. Therefore, the total time to complete this operation is proportional to the number of advancement individuals in your institution's Advancement system, regardless of the number of data elements in a profile, and regardless of the expected number of data changes the selection would pick up. This means that for push requests where you expect only a small number of data changes to be collected into the file, the operation using the file creation will take substantially longer than the same operation done using the web service. In SGHE's tests, finding a few data changes in a collection of 51,000 advancement individuals takes a few seconds when done using the web service option, but takes 10-12 minutes when done using the output to file option. Therefore, your institution should expect that writing incremental data changes to a CSV file will take much longer than the web service operation, and the time it takes will be proportional to the number of advancement individuals your institution has, and will not be proportional to the expected amount of data that will be collected.

Break up large data sets into multiple files

Based on the iModules' recommended CSV file size limit of 20MB, your institution may want to initiate multiple push requests, generating multiple CSV files for the initial data load. If this is necessary, two possible options are:

- Use the same push profile and initiate it multiple times, varying the Begin and End Date ranges to break the request into separate time periods.

- Use different push profiles that each address a certain set of data elements - bio, degrees, activities, spouse and children, etc., and collect this data for all advancement individuals.

Allocate sufficient memory to Java when writing large files

When writing CSV files, the Advancement Connector uses a form of memory on the connector server called heap space. It is an allocation of the server's memory to the Java virtual machine that is executing the code that creates the CSV file from the data in the transfer out table. The more records the process writes out, the more heap space the Java virtual machine needs. If, during the file writing operation, the virtual machine runs out of heap space, the file writing process will terminate, without writing some of the records to the file, and the Java virtual machine will log an out of memory exception. Therefore it is important to configure the connector OC4J container in the Oracle Application Server to allocate sufficient memory to the Java virtual machine. The installation instructions for this release increase the heap size for the connector's Java Virtual Machine (JVM) to 1536 Megabytes or 1.5 Gigabytes. In SGHE's tests, this memory allocation was sufficient to

allow the connector to write out 51,000 advancement individual records to a CSV file, with some room for writing a larger number than that.

> 📝 **Note**
>
> For more information on adjusting the JVM heap size, refer to the Step 6 Increase the JVM heap size section in the *p1-jg5hsb_alu8040001in.pdf.* ∎
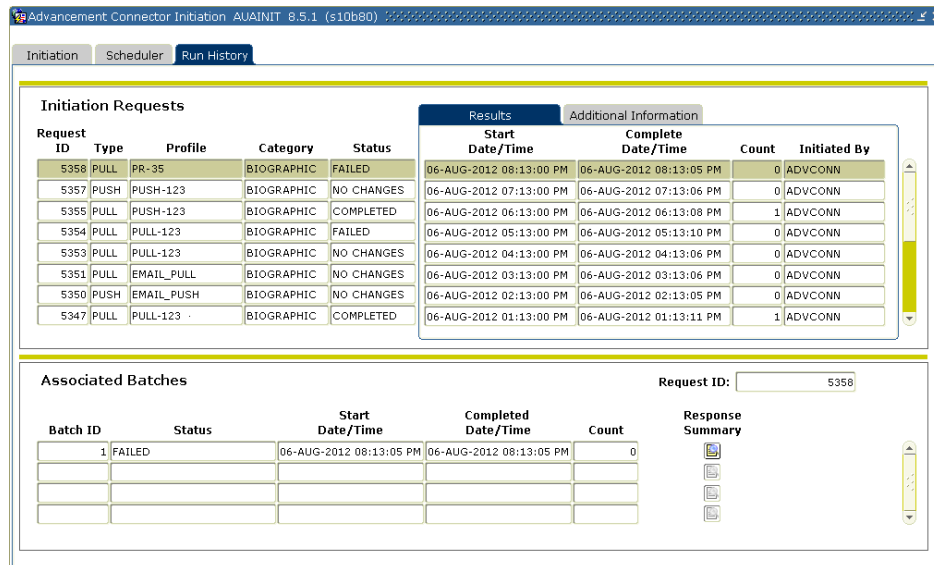
However, if your Advancement system has a substantially larger number of advancement individuals in it, you may need to allocate even more memory to the Java virtual machine, to get a successful file write, if you are writing the records out into one file.

Once the large initial data load files have been generated, you can reduce the amount of memory allocated to the Java virtual machine. For normal incremental data change operations, a heap size between 512 and 1024 Megabytes should be more that sufficient.

View the status of a push process

Use the following steps to view the status of a push process.

1. Access the Advancement Connector Initiation Form (AUAINIT).

2. Select the Run History tab.

Each push request in the Initiation Requests block has one of the following statuses:

INITIATED	Transfer was initiated and is in process.
COMPLETED	Data was successfully pushed from Banner to Encompass.
COMPLETE WITH ERROR	Some data was pushed, but at least one data element had an error.
NO CHANGES	Push was initiated but there were no data changes in the requested date range.
FAILED	Transfer failed due to system or service issues.

3. In the Initiation Requests block, select the push process that you want to view.

4. Review the associated batch details in the Associated Batches block.

5. (Optional) Use the following steps to display the iModules Web service response message for a batch:

    5.1. Select a batch in the Associated Batches block.

    5.2. Click **Response Summary**.

    5.3. Review the response message.

    5.4. Click **Close**.

Correct a push process that processed with errors

If the status of a push process is *COMPLETE WITH ERROR*, some of the data elements were not pushed successfully. Use the following steps to correct the errors.

1. Access the Advancement Connector Initiation Form (AUAINIT).

2. Select the Run History tab.

3. In the Initiation Requests block, select the push process that processed with errors.

4. Select the batch in the Associated Batches block that has the status *COMPLETE WITH ERROR*.

5. Click **Response Summary**.

6. Review the response summary.

7. Click **Close**.

8. Use the appropriate Banner forms to correct the Banner data.

9. Re-run the push process.

Pull biographic data from Encompass to Banner

The following tasks can be used to pull biographic data from Encompass to Banner.

📑 **Note**

> To maintain data integrity, you must develop a push/pull schedule that is appropriate for your institution and follow the schedule rigorously. ■

Initiate a pull process

Use the following steps to initiate a pull process.

1. Access the Advancement Connector Initiation Form (AUAINIT).

2. Select the Initiation tab.

3. Select *Pull* from the **Initiation Selection** drop-down list.

4. Select a category code from the **Category Code** drop-down list.

This code identifies the category of data elements that will be extracted from Encompass.

5. Select a profile code from the **Profile Code** drop-down list.

   This code identifies the set of data elements that will be extracted from Encompass.

6. Use the following steps to specify the date range of the data changes that you want to pull:

   6.1. Enter a date in the **Begin Date** field.

   Data changes with an activity date on or after this date will be selected. This date cannot be a future date nor can this date be after the end date.

   6.2. (Optional) Select a time from the **Begin Time** drop-down list.

   Data changes with a timestamp on or after this time will be selected.

   6.3. (Optional) Enter a date in the **End Date** field.

   Data changes with an activity date on or before this date will be selected.

   6.4. (Optional) Select a time from the **End Time** drop-down list.

   Data changes with a timestamp on or before this time will be selected.

7. Click **Run**. When processing is completed, a popup window confirms that the request was initiated.

8. Click **OK** in the popup window. The assigned ID is displayed in the **Request ID** field.

9. Select the Run History tab to check the status of the pull process.

   Each initiation request generates one or more batches of data to be synchronized. The number of batches depends on the number of transactions being processed and the batch size set in the Encompass properties file.

   Batches initially include all constituents that had Encompass data changes during the requested date range. The paging limit determines the size of these batches. Constituents are then dropped from the batches if their changes do not match any data elements in the pull profile. For this reason, the final count of constituents in a batch may be smaller than the batch size set in the Encompass properties file.

View the status of a pull process

Use the following steps to view the status of a pull process.

1. Access the Advancement Connector Initiation Form (AUAINIT).

2. Select the Run History tab.

Each pull request in the Initiation Requests block has one of the following statuses:

INITIATED	Transfer was initiated and is in process.
REVIEW	Data was successfully pulled from Encompass and is ready for review.
COMPLETED	All data was successfully pulled from Encompass, reviewed, and posted to Banner.
NO CHANGES	Pull was initiated but there were no data changes in the requested date range.
FAILED	Transfer failed due to system or service issues.

3. In the Initiation Requests block, select the pull process that you want to view.

4. Review the associated batch details in the Associated Batches block.

5. (Optional) Use the following steps to display the iModules Web service response message for a batch:

5.1. Select a batch in the Associated Batches block.

5.2. Click **Response Summary**.

5.3. Review the response message.

5.4. Click **Close**.

6. (Optional) To access pulled data that needs to be reviewed:

   6.1. Select the pull process in the Initiation Requests block (**Type** must be *PULL* and **Status** must be *REVIEW*).

   6.2. Click **Review**. The Advancement Connector Review Form (AUACRVW) is displayed.

   6.3. Use AUACRVW to review pulled data, take action, and post data changes.

Review and post data changes

The Advancement Connector Review Form (AUACRVW) is used to review and take action on a constituent's data changes. You can choose to insert the data changes into Banner, modify existing Banner data, or reject the changes. Once you take action on all data changes for a constituent, you can post the constituent's data changes to Banner.

AUACRVW displays unposted data changes only. When all data changes for a constituent are reviewed and successfully posted to Banner, AUACRVW no longer displays the constituent. When all constituents in a pull process are reviewed and posted, AUACRVW no longer displays the pull process.

The profile used to pull data from Encompass determines which data elements are displayed for review on AUACRVW. If at least one data change is pulled for a constituent, then all data elements in the profile are pulled and displayed on AUACRVW in the order defined in the pull profile.

To facilitate the review process, a pull profile should include all data elements related to the data that you want to pull. The profile should also define the display order so that related data elements are displayed together on AUACRVW. For example, a profile intended to pull preferred address changes should include all preferred address data elements and should specify a display order that groups these data elements together on AUACRVW.

You should review related data elements as a group so you can see the context of the data changes. Two flags on AUACRVW are used during the review process:

- A number sign (#) flags the "master" data element in each group of related data elements. For example, the Preferred Address Type data element is flagged to indicate that it is the "master" data element for the preferred address data elements.

- An asterisk (*) flags those data elements that have different values in Banner and Encompass.

The following table lists the "master" data element for each type of data:

Type of Data	"Master" Data Element
Primary e-mail	Primary Email Code
Business e-mail	Business Email Code
Preferred address	Preferred Address Type
Business address	Business Address Type
Preferred phone	Preferred Phone Type
Business phone	Business Phone Type
Home fax phone	Fax Phone Type
Business fax phone	Business Fax Phone Type
Cell phone	Cell Phone Type
Employment	Employer

If any data element in a group has a data change flagged with an asterisk (*), the "master" data element requires an action. The selected action applies to all data elements in the group. If a group has no data changes, the "master" data element does not require an action.

Normally you can select an action for "master" data elements only. The only exception is the ability to select the reject action for any data element. This action does not affect other data elements in the group.

Example

A constituent updates his preferred address in Encompass. All components of the preferred address are pulled from Encompass and displayed on AUACRVW. You want to accept all parts of the address except street line 2. Preferred Address Type is the "master" data element for preferred address information. The following actions allow you to insert a new Banner record with all of the updates except street line 2:

Data Element	Action
Preferred Address Type	*Insert*
Preferred Address 1	null (no action)
Preferred Address 2	*Reject*
Preferred Address 3	null (no action)
Preferred Address 4	null (no action)
City	null (no action)
State	null (no action)
Zip	null (no action)

It is important to understand the difference between the insert and modify actions:

• The insert action inserts a new Banner record with the pulled data changes. Use this action if there is no existing Banner record or if you need to keep the existing

Banner record as an audit trail. (An audit trail record is created where it is supported for repeating fields in Banner.)

- The modify action modifies an existing Banner record with the pulled data changes. This action overwrites existing values and can be used if you do not need to keep an audit trail of the existing Banner record.

Example

A constituent updates his primary e-mail address in Encompass. All components of the e-mail address are pulled and displayed on AUACRVW. Primary Email Code is the "master" data element for the pulled data. You want to keep an audit trail of the existing primary e-mail address, so you select the *Insert* action for the Primary Email Code data element. This action inserts a new e-mail record into Banner without overwriting the existing e-mail record.

Example

A constituent changes the suite number (address line 2) in her Encompass business address. All components of the business address are pulled and displayed on AUACRVW. Business Address Type is the "master" data element for the pulled data. You do not want to keep an audit trail of the change, so you select the *Modify* action for the Business Address Type data element. This action updates the business address in Banner, overwriting the previous address line 2.

Use the following steps to review and post data changes to Banner.

1. Access the Advancement Connector Review Form (AUACRVW).

2. Select a pull process from the **Request ID** drop-down list.

This is the ID that was assigned to the pull process when it was initiated on the Advancement Connector Initiation Form (AUAINIT). The list of values displays IDs for pull processes that have unreviewed data chcanges.

3. Select the Encompass data source code from the **Data Origin** drop-down list.

   This code identifies Encompass as the source of the data changes. This source code is assigned to all Encompass data changes that are posted to Banner.

4. Choose one of the following:

   4.1. If your institution tracks the address source for pulled data changes, select the Encompass address source code from the **Address Source** drop-down list. When address changes are posted to Banner, this source code is assigned to pertinent address records in Banner.

   4.2. If your institution does not track the address source for ulled data changes, leave the **Address Source** field blank.

5. Go to the Unreviewed Constituents block to view the constituents that have unreviewed data changes.

6. Select the constituent that you want to review.

   The Constituents Updates block displays the data elements that were pulled for the constituent. The profile used to pull data from Encompass determines which data elements are displayed.. If at least one data change is pulled for a constituent, then all data elements in the profile are pulled and displayed in the order defined in the pull profile.

7. Go to the next block.

8. (Optional) If you want to review a specific type of data, select the review category from the **Review Category** drop-down list.

   📄 **Note**

   Although you can review and take action on data changes for a specific review category, you must review and take action on *all* data changes before you can post any changes to Banner.

   If you select a review category and then want to remove the filter, clear the **Review Category** field and select Next Item or Next Block to display the entire list of data changes. ■

9. Use the following steps to review each group of related data elements that were pulled for the constituent.

   If the pull profile is defined properly, related data elements are displayed together on AUACRVW. Each group of related data elements has a "master" data element that is flagged with a number sign (#). If any data element in the group has a data change

flagged with an asterisk (*), the "master" data element requires an action. The selected action applies to all data elements in the group. If a group has no data changes, the "master" data element does not require an action.

9.1. Review the Connector value for each data element in the group. These are the values that were pulled from Encompass.

9.2. (Optional) If you need to change a Connector value before it is posted to Banner, enter the change in the appropriate **Connector Value** field and select Save. (This is how you can cleanse pulled addresses to meet your institution's format standards.)

You can change any Connector value, whether it matches the Banner value or not. If the Connector and Banner values originally matched and your change causes the values to no longer match, an asterisk is automatically assigned to the data element when you save the change.

9.3. (Optional) If you want to reject the Connector value for a specific data element without affecting other data elements in the group, select *Reject* from the **Action** drop-down list for the data element. This is the only action allowed for a data element that is not a "master" data element.

9.4. Choose one of the following values from the **Action** drop-down list for the group's "master" data element (the data element flagged with a number sign):

Insert   This action inserts a new Banner record with the Connector values. Select this action if either of the following conditions exists:

- The **Current Banner Value** fields are blank.

- The **Current Banner Value** fields have values that you want to keep as an audit trail. (An audit trail record is created where it is supported for repeating fields in Banner.)

Modify   This action modifies an existing Banner record with the Connector values. Select this action if you do not need to keep an audit trail of the existing Banner record. This action overwrites existing values, so make sure this is the desired result.

Reject   This action rejects all Connector values in the group of related data elements.

📑 **Note**

If you select an invalid action, the **Action** field does not accept your selection and an error message is displayed in the auto hint at the bottom of the form. Be alert to any error messages when you select an action. ■

10. Ensure that an action is selected for each group of related data elements.

You must take action on *all* groups that have data changes before you can post the constituent's data changes to Banner. If you take action on some but not all changes for a constituent, the actions are saved but not posted to Banner.

11. Select Save.

12. Click **Post Updates** to validate and post the constituent's changes to Banner.

📝 **Note**

If you change a Connector value or action to correct an error or warning message, you must save the change and then click **Post Updates** again.   ▪

13. Repeat steps 6 through 12 for each constituent in the pull process.

The specific Banner updates for each type of pulled data changes are described in "Banner updates for pulled data changes" on page 3-36.

Banner updates for pulled data changes

When you review data changes on AUACRVW, you can choose to insert a new Banner record, modify an existing Banner record, or reject the changes. It is important to understand the difference between the *Insert* and *Modify* actions:

- The *Insert* action inserts a new Banner record with the pulled data changes. This action should be used if there is no existing Banner record or if you need to keep the existing Banner record as an audit trail. (An audit trail record is created where it is supported for repeating fields in Banner.)

- The *Modify* action modifies an existing Banner record with the pulled data changes. This action overwrites existing values and can be used if you do not need to keep an audit trail of the existing Banner record.

Some situations may require more sophisticated handling than AUACRVW provides. In these cases, you should reject the changes on AUACRVW and update Banner manually.

The following sections describe the result of each action for the various types of data that can be pulled from Encompass.

Primary e-mail

The following data elements can be pulled from Encompass:

Primary Email
Primary Email Code

If an existing Banner e-mail record is flagged as "preferred," the **Current Banner Value** fields on AUACRVW display information for that e-mail record. If no existing Banner e-mail record is flagged as "preferred," the **Current Banner Value** fields are blank.

You must take one of the following actions if the pulled values are different from the existing Banner values:

Action	Result
Insert	This action inserts a new e-mail record into Banner. The record is flagged as "active" and "preferred." The "preferred" flag on the existing preferred e-mail record, if there is one, is removed. **Note:** If the pulled values match the values in an existing Banner e-mail record, the insert action is not allowed.
Modify	This action updates the existing "preferred" e-mail record in Banner with the pulled information. The e-mail types of the old and new records do not have to match. This action overwrites existing Banner values, so use it carefully. **Note:** If there is no existing "preferred" e-mail record in Banner, the modify action is not allowed.
Reject	All data changes are rejected. Banner is not updated.

Business e-mail

The following data elements can be pulled from Encompass:

> Business E-mail
> Business E-mail Code

Push processing and pull processing assume that one e-mail type is used to indicate business e-mail addresses. The push profile specifies the e-mail type that is used to push and pull business e-mail addresses for all constituents. If your institution has other policies related to business e-mail addresses, you may need to update business e-mail addresses manually rather than use AUACRVW.

The **Current Banner Value** fields on AUACRVW display information for the business e-mail record as follows:

• If Banner has one active business e-mail record with the same e-mail type that was pulled from Encompass, then AUACRVW displays that record.

• If Banner has multiple active business e-mail records with the same e-mail type that was pulled from Encompass, then AUACRVW displays the e-mail record with the most recent activity date.

• If Banner has no active business e-mail records with the same e-mail type that was pulled from Encompass, then the **Current Banner Value** fields are blank.

You must take one of the following actions if the pulled values are different from the existing Banner values:

Action	Result
Insert	This action inserts a new business e-mail record into Banner. The record is flagged as "active." **Note:** If the pulled values match the values in an existing Banner e-mail record, the insert action is not allowed.
Modify	This action updates the business e-mail address in the existing active Banner record that has the same e-mail type code that was pulled from Encompass. If multiple Banner records have the same e-mail type code, the record with the most recent activity date is updated. This action overwrites existing Banner values, so use it carefully. **Note:** If there is no existing active e-mail record in Banner that has the same e-mail type code that was pulled from Encompass, the modify action is not allowed.
Reject	All data changes are rejected. Banner is not updated.

Preferred phone

The following data elements can be pulled from Encompass:

> Preferred Phone Type
> Preferred Phone Address Type (hidden) (optional)
> Preferred Phone Address Sequence Number (hidden) (optional)
> Phone Country Code (optional)
> Phone Area Code (optional)
> Phone Number
> Phone Extension (optional)

The profile that is used to push preferred phone numbers to Encompass affects the preferred phone numbers that are pulled from Encompass:

• If the push profile specifies a preferred phone type, then that phone type is used to push and pull preferred phone numbers for all constituents. For each constituent, the "primary" phone number that has this phone type is synchronized between Banner and Encompass.

- If the push profile does not specify a preferred phone type, then the "primary" phone number that is associated with the most current preferred address is pushed and pulled for each constituent. The preferred address is determined by the preferred address type on the Advancement Individual Information Form (APACONS).

Preferred telephone is first searched for using the Telephone Type, Address Type and Address Sequence number returned from Encompass. If an exact match of the three fields is found on an active SPRTELE record, the data for this record is displayed in the Current Banner Value column for the preferred telephone data elements.

If an exact match is not found on the above three fields, the SPRTELE table is searched for an active telephone record that matches the Telephone type only. If only one record is found, the data from that record is displayed in the Current Banner Value column.

If more than one record is found, the records are sorted by the Primary Indicator first and then the Activity Date. The record having the most recent Activity Date and having the Primary indicator checked would be selected for display. If there are no matching phone records that have the Primary checkbox checked, then the matching one having the most recent Activity Date value would be displayed in the Current Banner Value column

You must take one of the following actions if the pulled values are different from the existing Banner values:

Action	Result
Insert	This action inserts a new phone record into Banner. The record is flagged as "primary" and this phone record is automatically linked to the preferred address record. Insert is not allowed if an existing Banner phone record has the same phone type, phone number, address type, and sequence number as Encompass.
	If the new phone record is tied to an address, only one phone record with that phone type, address type, and sequence number can be flagged as "primary." The "primary" flag is removed from any existing phone records that have the same phone type, address type, and sequence number as the new record. If it is not tied to an address, multiple phone records can be flagged as "primary."
	If the pull request also included changes to preferred address information for this constituent, this is recognized in the enhanced logic. Therefore, the inserted phone record would be associated with the preferred address record that would exist after all updates are posted for this constituent for this pull.

Action	Result
Modify	This action updates the existing "primary" phone record in Banner that has the same phone type, address type, and sequence number that were pulled from Encompass. This action overwrites existing Banner values, so use it carefully.
	If there is an existing primary active phone record linked to the current preferred address record, the primary checkbox will be unchecked on this phone record. This is because the alumnus has provided an updated preferred phone # that should now be associated with the preferred address record. Since an address record cannot have more than one primary phone record associated with it, this update is required.
	The existing phone record will not be inactivated as it is not certain that this phone number is invalid.
	If this Encompass pull also included a preferred address type change for this constituent and Insert was selected for handling this update, any existing phone records associated with the 'old' preferred address are marked as inactive. This reflects the standard handling that would occur in Banner Advancement when the same transactions are entered online.
	Note: If no matching phone record is found, when the user tries to select the Modify action on the review form, they'll see that it is not accepted by the system (it is blanked out) as it is not a valid action if an existing address record for this address type does not exist.
Reject	All data changes are rejected. Banner is not updated.

Business phone

The following data elements can be pulled from Encompass:

> Business Phone Type
> Business Phone Address Type (hidden) (optional)
> Business Phone Address Sequence Number (hidden) (optional)
> Business Phone Country Code (optional)
> Business Phone Area Code (optional)
> Business Phone Number
> Business Phone Extension (optional)

The profile that is used to push business phone numbers to Encompass affects the business phone numbers that are pulled from Encompass:

- If the push profile specifies a business phone type, then that phone type is used to push and pull business phone numbers for all constituents. For each constituent, the "primary" phone number that has this phone type is synchronized between Banner and Encompass.

- If the push profile does not specify a business phone type, then the "primary" phone number that is tied to a constituent's business address is pushed and pulled for each constituent.

The **Current Banner Value** fields on AUACRVW display information for the "primary" Banner phone record that matches the phone type, address type, and sequence number that were pulled from Encompass. If no Banner phone record meets these criteria, the **Current Banner Value** fields are blank.

📒 **Note**

> In some cases, the address type and sequence number are blank for the business phone. For example, a cell phone might be the business phone without being tied to an address. ■

You must take one of the following actions if the pulled values are different from the existing Banner values:

Action	Result
Insert	This action inserts a new phone record into Banner. The record is flagged as "primary."
	If the new phone record is tied to an address, then only one phone record with that phone type, address type, and sequence number can be flagged as "primary." The "primary" flag is removed from any existing phone records that have the same phone type, address type, and sequence number as the new record.
	If the new phone record is not tied to an address, then multiple phone records with that phone type, address type, and sequence number can be flagged as "primary."
	Note: If an existing Banner phone record has the same phone type, phone number, address type, and sequence number that were pulled from Encompass, the insert action is not allowed.

Action	Result
Modify	This action updates the existing "primary" phone record in Banner that has the same phone type, address type, and sequence number that were pulled from Encompass. This action overwrites existing Banner values, so use it carefully.

Note: If there is no existing "primary" phone record in Banner that matches the phone type, address type, and sequence number that were pulled from Encompass, the modify action is not allowed. |
| Reject | All data changes are rejected. Banner is not updated. |

Preferred address

The following data elements can be pulled from Encompass:

> Address Status (hidden)
> Preferred Address Type
> Preferred Address 1-4
> House Number
> City
> State
> Zip
> Country

The profile that is used to push preferred addresses to Encompass also affects the preferred addresses that are pulled from Encompass to Banner:

- If the push profile specifies a preferred address type, then that address type is used to push and pull preferred addresses for all constituents. For each constituent, the address that has this address type is synchronized between Banner and Encompass.

- If the push profile does not specify a preferred address type, then the preferred address type that is defined for a constituent on the Advancement Individual Information Form (APACONS) is used to synchronize the constituent's preferred address between Banner and Encompass.

If no address type is returned from Encompass, the current preferred address type in Banner (APBCONS_ATYPE_CODE_PREF) is used to display the preferred address information in the Current Banner Value column.

If an address type is returned from Encompass, that address type is used to locate a current address record with the matching address type. If no current address record matches the address type returned from Encompass, no data is displayed in the Current Banner Value column

You must take one of the following actions if the pulled values are different from the existing Banner values:

Action	Result
Insert	This action inserts a new address record into Banner. The current date is stored as the start date.
	If the existing preferred address in Banner has the same address type that was pulled from Encompass but the address details are different, yesterday's date is stored as the end date for the existing address. This allows you to keep the existing record for audit purposes.
	If the preferred address type value pulled from Encompass is different than the current preferred address type in Banner Advancement (per APACONS), the preferred address type (APBCONS_ATYPE_CODE_PREF) is updated automatically in Banner Advancement to reflect the address type retrieved from Encompass.
	If an address record currently exists in Banner that matches the address type retrieved from Encompass, this address record is inactivated. This is done automatically via population of the To Date field with yesterday's date, which results in the Inactivate Address check box being checked.
	If a change to the Encompass preferred phone information is also provided as part of this Encompass update AND the Insert action is the selected for handling this updated phone information, a new phone record is inserted and is associated with this new address record after appropriate processing on the review form. In this case, no phone records currently associated with the existing preferred address record need to be re-associated with this new address record.
	If this Encompass update does not include any new preferred phone update, the connector logic automatically re-associates the primary phone record tied to the current preferred address record in Banner to the newly inserted preferred address record.
	In both scenarios above for phone records, there would be no updates to existing non-primary phone numbers associated with the old preferred address record.
	Note: If the existing preferred address record in Banner has the same address details that were pulled from Encompass, the insert action is not allowed.

Action	Result
Modify	If the preferred address type value pulled from Encompass is different than the current preferred address type in Banner Advancement (per APACONS), the preferred address type (APBCONS_ATYPE_CODE_PREF) is updated automatically in Banner Advancement to reflect the address type value retrieved from Encompass. If there is, a matching active address found in Banner with a the same address type, the sane matching address record is updated to reflect the changes pulled over from Encompass and displayed on the Review form when the user saves and posts this constituent's updates. If no matching address record is found, when the user tries to select the Modify action on the review form, they'll see that it is not accepted by the system (it is blanked out) as it is not a valid action if an existing address record for this address type does not exist. The user can tell if a matching existing record has been found as it would have its values displayed in the Current Banner Value column on the review form. In this scenario, since the user is choosing to 'Modify' the existing address record, no updates are performed to existing phone records as part of this address update. However, if there were actual preferred phone updates included from Encompass for this constituent, the rules for handling Preferred Phone Updates would be used. Please see the rules for handling Preferred Phone Inserts and Modifies found later in subsequent pages of this document.
Reject	All data changes are rejected. Banner is not updated.

Business address

The following data elements can be pulled from Encompass:

Business Address Status (hidden) (optional)
Business Address Type
Business Address 1
Business Address 2
Business Address 3
Business Address 4
Business House Number

Business City
Business State
Business Zip
Business Country

The profile that is used to push business addresses to Encompass also affects the business addresses that are pulled from Encompass to Banner:

- If the push profile specifies a business address type, then that address type is used to synchronize all business addresses between Banner and Encompass.

- If the push profile does not specify a business address type, then the business address that is associated with a constituent's current active employment record is synchronized between Banner and Encompass.

The **Current Banner Value** fields on AUACRVW display information for the Banner address record that matches the address type pulled from Encompass and is active in Banner when the data changes are being reviewed on AUACRVW. If no Banner address record meets these criteria, the **Current Banner Value** fields are blank.

You must take one of the following actions if the pulled values are different from the existing Banner values:

Action	Result
Insert	This action inserts a new address record into Banner. The current date is stored as the start date.
	If the existing business address in Banner has the same address type that was pulled from Encompass but the address details are different, yesterday's date is stored as the end date for the existing address. This allows you to keep the existing record for audit purposes.
	Note: If the existing business address record in Banner has the same address details that were pulled from Encompass, the insert action is not allowed.
Modify	This action updates the business address record in Banner with the pulled information. This action overwrites existing Banner values, so use it carefully.
	Note: If no active business address record in Banner matches the pulled address type, the modify action is not allowed.
Reject	All data changes are rejected. Banner is not updated.

Business addresses and primary employment

When appropriate, institutions may associate the primary employment record to an address record on the APAEHIS form. To accommodate this and streamline the process, logic allows you to maintain or establish links between the appropriate business address and primary employment records when pulling updates from Encompass to employment or business address information.

If any of the new three employment fields have changes that are pulled from Encompass, the following actions are available on AUACRVW:

Employment Updates - Insert

Action	Description
Insert new employment record	A new employment record is inserted and marked as the primary employment record. It will contain the updated values pulled from Encompass for the Employer Name, Job Title and Job Category fields.
Update existing employment record that does not include updates to Business Address	If there is an existing primary employment record, the primary indicator will be un-checked.
	If the update from Encompass does NOT include any updates to the Business Address information, the new primary employment record will NOT be linked to an address automatically. Any linking needs to be performed manually by institutional personnel.
	This automatic linking does not occur because it is assumed if there is a new business address for the new employer, the alumni would have provided the updates in Encompass, in which case the employment and address records would be linked automatically, as described below.

Action	Description
Update existing employment record that does includes updates to Business Address	If there is an existing primary employment record, the primary indicator will be un-checked. If the update from Encompass also includes a change to any of the Business Address data elements and the INSERT or MODIFY action is selected for posting the business address updates, the new primary employment record will be tied to the new or modified business address record. This may occur when an alumni changes jobs and provides that information along with an updated business address, in which case the employer and business address should be associated to each other.
Update a Business Address update when there are no updates to the Employer-related fields	If the current primary employment record is NOT associated with an address record, no address link changes will be made to the primary employment record. If the current primary employment record is associated to an address record, the system will determine if the address record linked to the primary employer record has the same address type as the business address record for which the updates were pulled. If it does, in addition to the standard business address update logic, the primary employer record will be updated to point to this new business address record. If it doesn't, no additional processing is performed for employment record purposes.

Employment Updates - Modify

Action	Description
Update employment record without Employer Name	If the update does not include an update to the Employer Name, the existing primary employer record will be updated with the new Job Title and/or Job Category and all other values will remain as-is.
Update employment record with Employer Name that does not include an Employer ID	If the update includes a change to the Employer Name and the current primary employment record does NOT have the employer ID populated (i.e. the employer name is entered in the employer text field), standard modification logic will occur.

Action	Description
Update employment record with Employer Name that does include an Employer ID	If the update includes a change to the Employer Name and the current primary employment record has the employee ID populated, the word 'ID' will display in the Notes column on the review form and the Modify action will not be allowed. In this scenario, you must select Insert or Reject. This is required because a modification to the employer name on an existing employer record, where the Employer ID is populated, is not allowed.
Updated employment record when there is no primary employment record	If there is no primary employer record, the Modify option is not allowed since there is no record to Modify. In this scenario, you must select Insert or Reject.

Home fax phone

The following data elements can be pulled from Encompass:

> Fax Phone Type (hidden)
>
> Fax Phone Address Type (hidden) (optional)
>
> Fax Phone Address Sequence Number (hidden) (optional)
>
> Fax Country Code (optional)
>
> Fax Area Code (optional)
>
> Fax Number
>
> Fax Extension (optional)

The profile that is used to push home fax phone numbers to Encompass affects the home fax phone numbers that are pulled from Encompass. The profile specifies the home fax phone type. For each constituent, the "primary" fax number that has this phone type is synchronized between Banner and Encompass.

The **Current Banner Value** fields on AUACRVW display information for the "primary" Banner phone record that matches the phone type, address type, and sequence number that were pulled from Encompass. If no Banner phone record meets these criteria, the **Current Banner Value** fields are blank.

> **Note**
>
> If the fax phone is not tied to an address, the address type and sequence number are blank. ■

You must take one of the following actions if the pulled values are different from the existing Banner values:

Action	Result
Insert	This action inserts a new phone record into Banner. The record is flagged as "primary."
	If the new phone record is tied to an address, then only one phone record with that phone type, address type, and sequence number can be flagged as "primary." The "primary" flag is removed from any existing phone records that have the same phone type, address type, and sequence number as the new record.
	If the new phone record is not tied to an address, then multiple phone records with that phone type, address type, and sequence number can be flagged as "primary."
	Note: If an existing Banner phone record has the same phone type, phone number, address type, and sequence number that were pulled from Encompass, the insert action is not allowed.
Modify	This action updates the existing "primary" phone record in Banner that has the same phone type, address type, and sequence number that were pulled from Encompass. This action overwrites existing Banner values, so use it carefully.
	Note: If there is no existing "primary" phone record in Banner that matches the phone type, address type, and sequence number that were pulled from Encompass, the modify action is not allowed.
Reject	All data changes are rejected. Banner is not updated.

Business fax phone

The following data elements can be pulled from Encompass:

Business Fax Phone Type (hidden)
Business Fax Phone Address Type (hidden) (optional)
Business Fax Phone Address Sequence Number (hidden) (optional)
Business Fax Country Code (optional)
Business Fax Area Code (optional)
Business Fax Number
Business Fax Extension (optional)

The profile that is used to push business fax phone numbers to Encompass affects the business fax phone numbers that are pulled from Encompass. The profile specifies the business fax phone type. For each constituent, the "primary" fax number that has this phone type is synchronized between Banner and Encompass.

The **Current Banner Value** fields on AUACRVW display information for the "primary" Banner phone record that matches the phone type, address type, and sequence number that were pulled from Encompass. If no Banner phone record meets these criteria, the **Current Banner Value** fields are blank.

📋 **Note**

> If the fax phone is not tied to an address, the address type and sequence number are blank. ◾

You must take one of the following actions if the pulled values are different from the existing Banner values:

Action	Result
Insert	This action inserts a new phone record into Banner. The record is flagged as "primary."
	If the new phone record is tied to an address, then only one phone record with that phone type, address type, and sequence number can be flagged as "primary." The "primary" flag is removed from any existing phone records that have the same phone type, address type, and sequence number as the new record.
	If the new phone record is not tied to an address, then multiple phone records with that phone type, address type, and sequence number can be flagged as "primary."
	Note: If an existing Banner phone record has the same phone type, phone number, address type, and sequence number that were pulled from Encompass, the insert action is not allowed.
Modify	This action updates the existing "primary" phone record in Banner that has the same phone type, address type, and sequence number that were pulled from Encompass. This action overwrites existing Banner values, so use it carefully.
	Note: If there is no existing "primary" phone record in Banner that matches the phone type, address type, and sequence number that were pulled from Encompass, the modify action is not allowed.
Reject	All data changes are rejected. Banner is not updated.

Cell phone

Once cell phone information is pushed to Encompass via the connector, the data is available to alumni and constituents in Encompass for maintenance purposes. After information is maintained in Encompass, the connector can be used to pull the updated information back to Banner Advancement.

The following data elements can be pulled from Encompass:

> Cell Phone Country Code
> Cell Phone Area Code
> Cell Phone Number

The # sign, which indicates the user must select a desired action for the record, displays to the right of the **Cell Phone Number** field in the **Constituents Updates** data block. This information appears as the third piece of cell phone information in the list within the data block. Failure to select an Action from the Cell Phone Number row will prevent the cell phone number and country and area codes (if present) from loading properly.

Action	Result
Insert	Insert a new active cell phone record with this cell phone type. If there is an existing matching cell phone record, the Inactive check box is checked, thereby indicating it is inactive
Modify	When a matching active record for the constituent is found, the existing record is updated with the change from Encompass. This action is not allowed when no matching active record is found. If you try to select the Modify action, you will notice the system does not retain this action (it is blanked out.
Reject	All data changes are rejected. Banner is not updated.

Pull one-time, perpetual, and scheduled gifts from Encompass to Banner

The Encompass connector supports pulling one-time, perpetual, and scheduled gift transactions from Encompass to Banner Advancement.

One-time gifts and perpetual gifts are handled by Banner in an almost identical manner. A one-time gift is a single, one-time-only gift made by a donor. The perpetual gift option allows the donor to indicate a gift amount they would like to give at a predetermined frequency with no identified end date. You can identify a different gift type to be assigned to perpetual gifts through the Perpetual Gift Type field on the Advancement Control Form (AGACTRL). Otherwise, the value on the Gift Type field is applied to both one-time gifts and perpetual gifts.

A scheduled payment is a pledge made by a donor, with a pledge amount, a particular installment schedule, and corresponding pledge payments. Both a Banner pledge and a pledge payment can be created when the initial scheduled payment transaction is pulled over from Encompass. The gift reviewer will need to review both the pledge and pledge payment (gift) portions on the enhanced Review External Gifts Form (AGAWGIF). When both are approved and posted through AGAWGIF, all expected updates occur for the creation of a pledge, a pledge installment schedule, and a pledge payment.

Supported transaction types

Banner Advancement supports pulling the following types of one-time, perpetual, and scheduled gifts:

Fields	Descriptions
Authenticated Gifts	Authenticated gifts are gifts made by a donor whose Encompass member record has a valid Banner PIDM value in the field labeled Constituent PIDM, typically found on the Admin Only tab of the member's Encompass profile.
	The standard mechanism for populating the Encompass Constituent_ID is with the PIDM value, which is provided by the Banner Advancement push to Encompass. Thus, if populated in this manner, it should always be a valid Banner PIDM.
	Each complete and valid authenticated gift is considered a candidate for mass posting via the Gift List tab of the AGAWGIF form.

Fields	Descriptions
Unauthenticated Gifts	Unauthenticated gifts are gifts made by a donor whose Encompass member record does not have a valid Banner PIDM value in the field labeled Constituent PIDM, typically found on the Admin Only tab of the member's Encompass profile. This can occur for various reasons including the gift being made by a new donor who doesn't yet have a record in Banner or when the donor doesn't sign-on when making the gift and the gift is not associated with a member record having a valid PIDM in the Constituent PIDM field.

For unauthenticated gifts, the billing information provided by the donor when making the gift (and listed below) is pulled from Encompass to Banner and can be viewed on the APAWPRS form. For these transactions, the external gift review process needs to include reviewing the external person data to either tie the incoming donor to an existing Banner ID or create a new Banner ID to which the incoming gift would be tied.

The following are the specific biographic-related elements pulled from Encompass and displayed on the APAWPRS form:

Person Information tab:

- Last Name (required in Encompass

- First Name (required in Encompass)

Address Information tab:

- Phone (required in Encompass, shown in Processing Instructions field, user needs to cut & paste into appropriate phone fields)

- Street Line 1 (required in Encompass

- Street Line 2

- City (required in Encompass)

- State (required in Encompass)

- Zip (required in Encompass)

- Nation (required in Encompass)

Fields	Descriptions
	Note: If there are multiple unauthenticated Encompass gifts in the temporary gift tables and more than one of these unauthenticated gifts is associated with the same Encompass member ID, when the first of these gifts is reviewed and associated with a Banner ID (regardless of whether this is done through the creation of a new Banner constituent or the association of this gift to an existing Banner constituent), all other unauthenticated gifts for this same Encompass member id in the temporary gift tables will be associated with this same Banner ID. The assumption is that if the first gift from this member is associated to a particular Banner ID, all other unauthenticated gifts from this same Encompass member ID sitting in the temporary gift tables should be associated with that same Banner ID. This saves the reviewer time in having to associate each of these unauthenticated gifts from this same member to the Banner ID. This will save the reviewer look-up and data entry time since the association will occur automatically.
Gifts with Multiple Designations	Gift transactions entered in Encompass can be allocated to multiple designations.

Banner will allow you to retrieve, review and process these transactions, per standard workflow. |

Fields	Descriptions
Gifts with a Single Designation	For single-designation gifts, there are two Encompass scenarios supported for Gift Integration: • The designation is set-up as an actual designation in Encompass and is passed in the normal designation node via the iModules web service. • The campaign is set-up so that the user does not have to select a designation, thus saving data entry as there is only one designation option for this campaign. Therefore, the actual designation value MUST be set-up in a particular manner in Encompass so that the Banner gift integration logic can obtain the designation value. If it is not set-up in exactly this manner, the designation will not successfully be pulled from Encompass. When this campaign is created in Encompass, the set-up for this campaign must also include a Commerce Identifier = Banner Designation Code. If this Commerce Identifier is not available as a choice to your institution (using the Advance Mode when setting up the campaign), you must work with iModules to have a Commerce Identifier of 'Banner Designation Code' created and available. When available for selection, the 'Value' that you should assign for this Commerce Identifier should be the actual Banner designation code. The value of the Banner Designation Code Commerce Identifier will only be interrogated for a designation value if a designation value(s) is not found in the designation node when the iModules web service is called.
Gifts without a Designation	It is technically possible for gifts to be entered in Encompass without a designation value being entered or defaulted. These gifts are supported by gift integration. You can set-up a designation default (on AGACTRL) for any Encompass gifts pulled and are missing a designation. If this default is not set, the requirement of a valid designation value will be enforced when the user is positioned on the Gift Details tab of AGAWGIF when reviewing the pulled gift.

Un-supported transaction types

Banner Advancement does not support pulling the following types of transactions:

Type	Description
Skip Billing Transactions	Encompass allows an Admin user to enter a gift on behalf of a donor. While this follows the normal donation workflow, the Admin has an additional option to "Skip" the collection of Billing information. This is occasionally done when charging the credit card is not appropriate, such as registering for an event for which payment was provided separately. When these gift transactions are pulled from Encompass to Banner, these transactions are identified as errors as part of the Gift Processing error handling logic. Any error that meets this condition will not be accepted into Banner, thus these types of transactions should not be entered in Encompass.
Adjustment Transactions	While Encompass does allow the entry of adjustment transactions, Banner is considered the system of record. Therefore, all adjustments should be done directly in Banner, not through the Adjustment function in Encompass. The handling of Encompass Adjustment records is not supported by the Advancement Connector. Unfortunately, there is no method available to identify and exclude the pulling of these adjustment transactions in Gift Integration. Therefore, the only method of controlling this is for institutions to enforce the policy of no entry of Encompass Gift Adjustments.
All other Transactions	Gift Integration currently only supports one-time, perpetual, or scheduled gift transactions that are successful (complete) transactions. All other gift transactions are excluded, including the two noted in this table.

Scheduled payments

From a Banner perspective, a scheduled payment is a pledge made by a donor, with a pledge amount, a particular installment schedule, and corresponding pledge payments. You can create a Banner pledge and a pledge payment when the initial scheduled payment transaction is pulled over from Encompass. The gift reviewer will need to review both the pledge and pledge payment (gift) portions on the enhanced Review External Gifts Form (AGAWGIF). When both are approved and posted through AGAWGIF, all expected updates occur for the creation of a pledge, a pledge installment schedule, and a pledge payment.

The following sections provide detailed information about the support of scheduled payments.

Process overview

This section provides a high-level summary of the steps required to pull over scheduled payment transactions and process them to the permanent Banner tables:

1. A donor enters the Scheduled Payment transaction into Encompass. This can be authenticated or unauthenticated.

2. A gift pull is performed for this campaign so that the gifts are pulled over via the AUAINIT form or through a pull scheduled via AUAINIT.

3. After the manual pull is initiated, view the Run History tab of AUAINIT to ensure that the status of the Request ID indicates successful completion. If it was a scheduled pull, the recipients of the e-mail notification review the notification.

4. Errors that are encountered display, per existing functionality, in the Response Summary shown on the Run History tab on AUAINIT. This information is also reflected in the e-mail text for anyone who receives e-mail notifications when a scheduled gift pull has been completed.

5. Navigate to AGAWGIF to review and process the pulled gifts (and attached pledges, if applicable).

6. If the New Pledge check box is checked on the Gift List tab for a transaction, the Pledge Details tab will be active. The majority of the fields on this tab are editable.

7. If this is an unauthenticated gift, navigate to the External Person Form (APAWPRS). Complete the normal steps to review the external person data to associate it with an existing or new Banner ID. You can then "x" out of APAWPRS.

8. Navigate to the Pledge Details tab to review the pledge and ensure the details are correct. When you are satisfied with the pledge information, check the Accepted check box. Any time the Accepted check box is checked or unchecked, the form will complete an automatic save.

   If any errors are detected, an attempt to mark the Accepted check box will fail and error messages will display. Fix the errors and try to check the Accepted check box again. Repeat until you can successful mark the Accepted check box. This indicates that the pledge has been reviewed and accepted.

9. Complete one of the following options:

   9.1. To post a single gift, navigate to the Gift Details tab.

   9.2. To post a batch, navigate to the Gift List tab and use the Check All function or mark the Load check box to select this and any other desired qualifying gifts.

10. Select the appropriate Create Gifts option to initiate the posting of the selected gifts to Banner.

11. If errors are detected on gifts with attached pledges when the Create Gifts option is checked, the gift transactions should have the Review check box marked, per existing standard functionality. Fix the errors and post the gift from the Gift Details form per existing standards.

12. Subsequent pledge payments are pulled over in subsequent pull requests. These transactions do not contain an attached pledge record, so they should be reviewed and posted on AGAWGIF per normal gift handling.

Initial scheduled payment

The scheduled payment option provided in Encompass allows the user to specify the total donation (pledged) amount along with information regarding the frequency and duration of the payments. When the scheduled payment option is selected, the first payment is always taken at that time. There is no option to defer the initial pledge payment. All subsequent payments on this pledge are taken automatically, with no data entry required on the donor's part, based on the payment schedule identified by the donor when the initial scheduled payment transaction is entered. Scheduled payments can be authenticated or unauthenticated.

When the donor enters the scheduled payment, Encompass provides the donor the option to change the day of the month on which all subsequent payments are made. There are three options provided in a drop-down labeled 'Make payments based on'. The three options are as follows:

- Current Date (Default)

- 1st Day of Month

- 15th Day of Month.

If the donor chooses the 1st or the 15th of the month and their original donation date is not the 1st or the 15th, an additional step is required by the Banner gift processor to help ensure that the Banner pledge installment schedule matches the schedule created in Encompass.

For example, a donor makes a donation of $1200 paid monthly over a 12 month period. The original scheduled payment is made by the donor in Encompass on May 13, 2013.

- Scenario 1: The donor leaves the 'Current Date' as the date of the month on which all subsequent pledge payments should be charged against their credit card. In this case, no manual adjustment to the pledge installment schedule is required in Banner as both the first installment and all subsequent installments will be scheduled to occur on the 13th of the month, regardless of frequency.

- Scenario 2: The donor changes the 'Current Date' value to the 1st Day of month or the 15th Day of Month. However, the date the pledge is made is NOT the 1st or 15th of the month. Banner does not support this scenario without the user having to manually adjust the pledge installment schedule in some way. If this scenario occurs, the Banner user will be made aware of this situation when reviewing the pledge on AGAWGIF through two different methods.

The first method to notify the user of a change of payment date is the display of a new field labeled External Next Payment Date on the Pledge Details tab of AGAWGIF, in the Installment Information datablock. This view-only field displays the Next Payment Date that is pulled from Encompass. The user can compare the First Bill Date value which indicates the date the initial payment was made, to the External Next Payment Date value. If they occur on a different day of the month, the user should understand that the pledge installment data will require adjustment.

In the graphic below, the user has selected the 1st of the month for the subsequent scheduled payments even though the initial payment was taken on May 13th. Therefore, the External Next Payment Date provided by iModules is July 1st. When the payment frequency is monthly, it appears that the iModules Next Payment Date calculation ensures that a full month has transpired between the initial and next payment. Therefore, iModules calculates July 1st as the External Next Payment Date instead of June 1st.
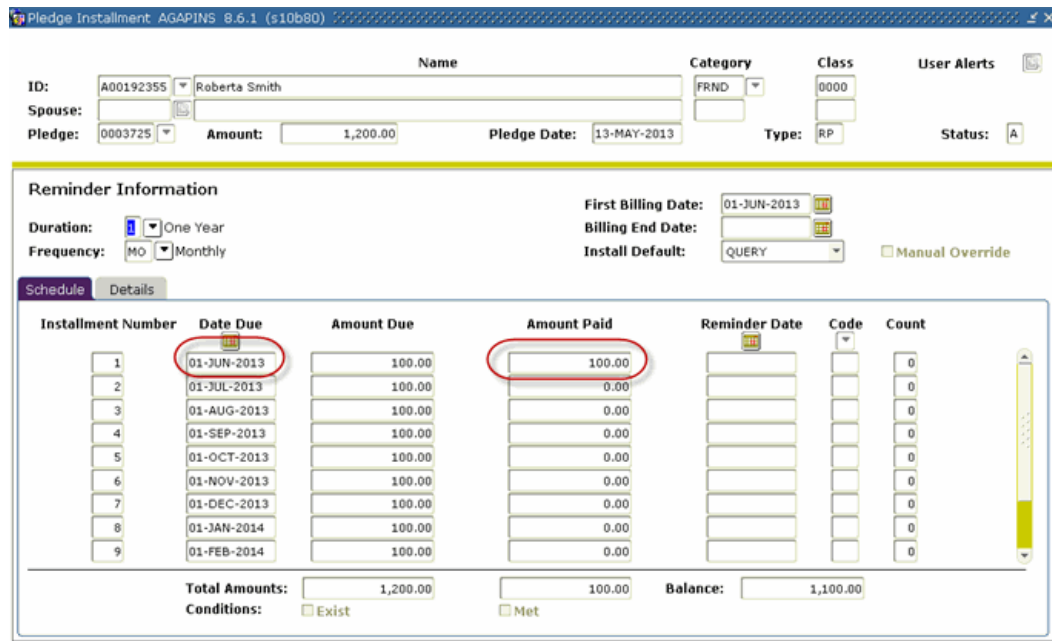
Additionally, when the user successfully checks the Accepted check box on the Pledge Details tab, a warning will display in a pop-up. The warning message indicates: "Please note that the installment schedule requires manual adjustment based on the External Next Payment Date value. See online help for additional details."

The user should then click **OK** to acknowledge the message. The best practice recommendation is for the reviewer to modify the First Bill Date on the Pledge Details form of AGAWGIF to be in line with the External Next Payment Date value provided by iModules. Given that the above scenario has a frequency of monthly, the reviewer would modify the First Bill Date and change the value from May 13 2013 to June 1, 2013.

📑 **Note**

> This date modification does not impact the gift date. It indicates the First Bill Date value that should be used by the pledge installment logic for the creation of the pledge installments. ∎

With this modification, the user has addressed the issue of all subsequent payments being taken on the first day of the month by adjusting the first payment date to match. When the installment schedule is created, the system will show the first installment as paid, as the initial pledge payment always accompanies a scheduled payment from Encompass. Modifying this First Bill Date has no negative implications and is the easiest method to ensure the pledge installment dates for all remaining scheduled payments have the same dates in Banner as exist in Encompass.

In the figure above, the user would have entered June 1st as the new First Bill Date. As this is a monthly payment, the June 1st date would line up with the next payment date value provided by Encompass, which was July 1st. The actual first pledge payment has

already been paid so that amount display in the Amount Paid column for the first installment.

The actual Gift Record will correctly record the date of the gift and is not impacted by this change to the First Bill Date value on AGAWGIF. If the user forgets to make this change on AGAWGIF, they can make the change on the AGAPINS form after the pledge is posted either by removing and creating the installment schedule again with a new value in the First Billing Date, or modifying each of the Date Due values as desired on the Schedule tab.

The frequency selected by the donor and the Next Payment Date value will help the user determine the appropriate date to enter into the First Bill Date. The user should always verify any schedule adjustments on AGAPINS after posting the transaction. If further modifications are required to the Date Due values for the remaining installments, those can be made on the AGAPINS form.

Pledge installments out of balance

The pledge installment schedule that is created when you post a pledge from AGAWGIF pledge installment schedule may run into rounding issues that result in Expected Amounts on the installment schedule and installment detail records that do not match. If this were to occur, a warning message would display on AGAWGIF when you attempt to post the gift and pledge. The message is as follows:

> All installment schedule amounts could not be evenly distributed to the associated installment detail records for ID XXXXXXXXX, Pledge 9999999. Please adjust Expected Amounts on Installment Detail records accordingly.

The logic used to post gifts/pledges and create the installment schedule handles one pledge/gift record at a time, even if the user performs batch-level posting of multiple gifts/ pledges on AGAWGIF. As a part of all of the existing messaging that occurs when gifts and pledges are posted, this new warning would also display for each pledge that is posted where the out-of-balance condition has resulted from the pledge installment creation process. If a batch of multiple pledges were posted on AGAWGIF and there were two out of six pledges with out-of-balance installment schedules, the user would see two separate pop-up messages on AGAWGIF with the above warning message. This would provide the user with the appropriate information to navigate to AGAPINS and review the installment schedule for the identified Banner ID and Pledge number.

Subsequent pledge payments

For scheduled payment transactions, institutions must always pull over the initial scheduled payment transaction prior to pulling over any subsequent payments. This is required to ensure that the duration of the pledge payment schedule can be calculated correctly.

One of the data elements provided to Banner through the iModules Web services is a count of the remaining payments for a scheduled payment transaction. This value changes as subsequent payments are taken. If the initial scheduled payment was set-up for 11 remaining payments after the initial payment, *11* would be provided to Banner in the Web services. If the initial scheduled payment was not included in a pull prior to the institution pulling over the next payment, and they all ended up in the same pull, iModules would have decreased the amount of remaining payments from *11* to *10*. This would be an incorrect value for the Duration calculation performed by Banner.

⚠️ **Warning**

> The initial scheduled payment transaction must ALWAYS be included in a pull completed prior to pulling any of the subsequent payment transactions over to Banner. ■

When a pledge is pulled over from Encompass, the Web service response provides the external pledge number, which is Encompass's unique pledge #. When a pledge is processed and posted through AGAWGIF, this Encompass pledge value is stored in the AGBPLDG_EXT_PLEDGE_ID field on the pledge. This value can be viewed at the bottom of the AGAWPLG form.

When subsequent pledge payments are pulled in a gift pull, the external pledge number is provided for these transactions. The Banner logic uses the external pledge ID to look for an existing pledge record with this eternal pledge # on the AGBEPLG (temporary pledge) or AGBPLDG (permanent pledge) tables. If one is found for the identified Banner ID, the system automatically associates the subsequent pledge payment to the correct Banner ID and Pledge number. This is true whether the incoming subsequent payment is authenticated or unauthenticated.

Gift setup in Banner

This section describes the set-up steps necessary for pulling gifts from Encompass to Banner Advancement. As part of this process, the following forms in Banner need to be examined:

- AGACTRL
- AUACMAP
- AUACDEF

📋 **Note**

> The 'Allow Web Pledges' and 'Allow Web Gifts' check boxes on the Base Information tab on the AFACAMP Form (Campaign Detail), are not used, as it's assumed each institution will only set up campaigns in Encompass for which it makes sense to allow the donor to make online gifts. ■

AGACTRL

Each gift transaction in Banner must contain a valid gift type code. As the entry of this value is not supported in Encompass, a Gift Type default must be set-up in Banner for Encompass gift transactions to successfully be pulled over to Banner. There are additional default fields that potentially require population by your institution to enable the Gift Integration to successfully function. All of these default values are now available for entry on the Connector Defaults sub-tab on the Institution tab of the AGACTRL form.

These defaults only need to be populated by institutions using the Encompass Gift Integration.

Gift Integration fields on the AGACTRL form are defined as follows:

Fields	Descriptions
Gift Type	This field identifies the default gift type that will be associated with all one-time gifts (authenticated and unauthenticated) being pulled from Encompass to Banner. Values in this drop-down are validated against the Gift/Payment Type Validation Form (ATVGIFT). Failure to enter a value in this field will result in an error for all one-time gifts when the process pulls gifts from Encompass to Banner. Required
Pledge Type	Identifies the pledge type value to be assigned to all pledges created as a result of pulled scheduled payment transactions. If not populated on this form, the gift reviewer is required to enter this value on the Pledge Details tab of the AGAWGIF form. It is recommended that this default value be populated to minimize data entry requirements on gift processing personnel. Optional
Perpetual Gift Type	This field allows you to identify a gift type unique to perpetual gifts. If you do not select a value for the new Perpetual Gift Type field, the value defaults to that selected for one-time gifts. Optional

Fields	Descriptions
Pledge Payment Type	Identifies a pledge payment type to be assigned to all pledge payments that are associated with the iModules scheduled payment transactions. If not populated, the value in the Gift Type parameter on this form will be assigned by default to the perpetual gift transactions. Optional
Pledge Status	Identifies the pledge status value to be assigned to all pledges created as a result of pulled scheduled payment transactions. If not populated on this form, the gift reviewer will be required to enter this value on the Pledge Details tab of the AGAWGIF form. It is recommended that this default value be populated to minimize data entry requirements on gift processing personnel. Optional
Address Type	When unauthenticated gift transactions are pulled from Encompass to Banner, this value is not available to be pulled from Encompass. Therefore, you can choose to set this default value or require the reviewer to enter this value for each unauthenticated gift on the external person form (APAWPRS). This value does not apply to authenticated gifts pulled from Encompass since new constituent records do not need to be created for those transactions. Values in this drop-down are validated against the Address Type Code Validation Form (STVATYP). **Note:** If your institution would most likely assign the same value to most or all unauthenticated gifts pulled from Encompass, it may be most efficient to enter this default value. Optional

Fields	Descriptions
Donor Category	When unauthenticated gift transactions are pulled from Encompass to Banner, this value is not available to be pulled from Encompass. Therefore, you can choose to set this default value or require the reviewer to enter this value for each unauthenticated gift on the external person form (APAWPRS). This value does not apply to authenticated gifts pulled from Encompass since new constituent records do not need to be created for those transactions. Values in this drop-down are validated against the Donor Category Code Validation Form (ATVDONR). **Note:** If your institution would most likely assign the same value to most or all unauthenticated gifts pulled from Encompass, it may be most efficient to enter this default value. Optional
Telephone Type	When unauthenticated gift transactions are pulled from Encompass to Banner, this value is not available to be pulled from Encompass. Therefore, you can choose to set this default value or require the reviewer to enter this value for each unauthenticated gift on the external person form (APAWPRS). This value does not apply to authenticated gifts pulled from Encompass since new constituent records do not need to be created for those transactions. Values in this drop-down are validated against the Telephone Type Validation Form (STVTELE). **Note:** If your institution would most likely assign the same value to most or all unauthenticated gifts pulled from Encompass, it may be most efficient to enter this default value. Optional

Fields	Descriptions
E-Mail Type	When unauthenticated gift transactions are pulled from Encompass to Banner this value is not available to be pulled from Encompass. Therefore, you can choose to set this default value or require the reviewer to enter this value for each unauthenticated gift on the external person form (APAWPRS). This value does not apply to authenticated gifts pulled from Encompass since new constituent records do not need to be created for those transactions. Values in this drop-down are validated against the E-Mail Type Validation Form (GTVEMAL). **Note:** If your institution would most likely assign the same value to most or all unauthenticated gifts pulled from Encompass, it may be most efficient to enter this default value. Optional

Fields	Descriptions
Designation	This field identifies the default designation that will be associated with gift transactions from Encompass that do not have a designation value. This is necessary because all gifts in Banner must have a designation code but Encompass campaigns have designation as an optional field.
	If you do not enter a value here and the value is not supplied by Encompass, the reviewer will have to enter the correct designation code for each of those gift transactions. This value is not utilized if the transaction contains a valid designation code.
	Note: If your institution would typically use the same designation value for any Encompass gifts pulled over missing designation, it may make sense to populate this field. If the designations may vary, you may want to leave this blank to ensure the reviewer has to pro actively enter the appropriate designation if none are supplied.
	Optional
Translation Data Source	This field allows you to indicate the default value that will be selected on APATRAN when adding new records. Records on APATRAN are used to translate Country and State values published by the International Organization for Standardization (ISO). Since ISO codes might not be utilized in Banner, this translation provides a cross-reference to ensure Banner knows how to properly map these values for addresses associated with unauthenticated gifts being pulled from Encompass to Banner. By default this value will be blank. Select a value to indicate you wish to use the translation functionality. Leave this field blank to indicate you do not wish to use the translation functionality.
	Optional

AUACMAP

The following components on the Advancement Connector Data Mapping Form (AUACMAP) allow you to set up gift integration:

- Valid Profile Categories Data block

- Data Mappings to support Gift Integration

- Gift Integration Review Category

- Gift Integration Profile Category

Valid Profile Categories Data block

The AUACMAP form contains a data block called Valid Profile Categories, which allows you to associate each data element in the Data Elements data block to the appropriate Profile Categories. As you navigate between Data Elements, the values in the Profile Categories data block change in order to reflect the associations to the Data Element in context.

📑 **Note**

> Prior to Banner Advancement 8.5, duplicate Data Elements with the same Connector Name were not allowed. With the introduction of the Profile Categories data block in 8.5 and the ability to indicate the profile category to which the Data Element applies, duplicate Connector Name values are allowed, as long as they have different Profile Categories. For example, you can have two Data Elements named SPRIDEN_FIRST_NAME, one with a Profile Category of Biographic that maps to the SPRIDEN table for Biographic updates and one with a Profile Category of Gift that maps to the APBWIDN table for Gift Pulls. You may not have two Data Elements that have the same Profile Category. ■

The following data elements are available in the data block:

Fields	Descriptions
Connector Name / Friendly Name	The top line displays the Connector Name and the Friendly Name of the Data Element in context in the above data block.
Category	This is the category to which the Data Element applies. Values in this drop-down are validated against ATVPFTP. This is required.
Description	Display only; provides the description associated with the selected Category value.
Active	This check box indicates whether the selected Profile Category is active for the associated Data Element. Typically this box will be checked as the record is most likely a 'seed data' record.

Fields	Descriptions
Push Allowed	This check box indicates whether the selected data element can be included on Push Profiles associated with this Profile Category. If the Push check box is not checked for the Data Element, you may not check the Push Allowed check box for the Profile Category. If the Push check box is checked for the Data Element, it can be checked or unchecked for the Profile Category.
Pull Allowed	This check box indicates whether the selected data element can be included on Pull Profiles associated with this Profile Category. If the Pull check box is not checked for the Data Element, you may not check the Pull Allowed check box for the Profile Category. If the Pull check box is checked for the Data Element, it can be checked or unchecked for the Profile Category.
Baseline	Display only; this is only checked if it is included in the seed data and indicates whether the Profile Category for the associated Data Element is supported as part of the Banner Advancement base product.

Add, Modify and Delete Rules

The following rules apply to the new Profile Categories data block

Action	Rule
Add	You can add a new Profile Category record at your discretion. However, it must have a unique Profile Category value; duplicates category values are not allowed.
	Note: If the baseline indicator is not checked on the Valid Profile Category record for a data element, this is not an integration type that is supported by the Banner Advancement Connector. Therefore, any desire you have to extend the Advancement Connector to support this data element for the indicated Profile Category type would be a customization you own and maintain.
Modify	You can modify a record. However, the record after the changes must not violate any constraints, such as creating a duplicate profile category value, and must be a valid value.

Action	Rule
Delete	Baseline records can not be deleted. If desired, you can inactivate a Profile Category by un-checking the Active check box." Non-baseline records can be deleted. However, performing this action will not impact any existing profiles of this Profile Category that contain this data element.

Additional business logic checks

The following information is meant to assist in the addition or modification to existing records.

- Each Profile Category record must have, at the minimum, the Push Allowed or Pull Allowed check box checked. You will receive an error and will not be able to save any profile records if this condition is not met.

- If the Data Element in the top data block has the Active indicator un-checked, a new Profile Category record cannot be associated with that data element. If this is attempted and you try to save this record, you will receive an error. This is because that data element is not considered active so it should not allow or require any new associations to Profile Categories.

- If a Data Element is active, it can be assigned a new Profile Category (via an Add in the Valid Profile Categories data block). However, this Profile Category record is only allowed to have the Push or Pull check box checked if the corresponding check box is checked for the Data Element in the top data block. If you attempt to check one of these Push or Pull check boxes for a Profile Category Record when the associated data element does not have the same check box checked, an error will appear and indicate 'Push or Pull can only be allowed if it is allowed for the associated Data Element'.

- If your institution inactivates a data element in the top data block of AUACMAP, please be aware that this does not have an impact on any existing profiles that already contain this data element. It only prevents that 'inactive' data element from being assigned to a profile moving forward. You can, at your discretion, manually delete the data element from any existing profiles if the data element is considered no longer valid from an institutional perspective.

Seed Data

Seed data is provided for each data element in the base product.

- For each data element supported for the existing BIOGRAPHIC integration, a BIOGRAPHIC Profile Category record is automatically installed when you install Banner Advancement, and these records will have the Baseline check box checked.

- For each data element supported for the new GIFT integration, a GIFT Profile Category record is automatically installed when you install Banner Advancement,

and these records will have the Baseline, Active and Pull Allowed check boxes checked.

- If your institution had defined any non-baseline data elements prior to your update to this release, the upgrade routine will automatically assign a BIOGRAPHIC Profile Category record to that data element.

Data mappings for gift integration

The master list of Data Elements includes Gift-Related data elements that are supported for Gift Integration. These Data Elements are all included as seed data and installed for you during the Banner Advancement installation process.

By default, all Data Elements listed below will have the Active, Baseline and Pull Allowed check boxes checked, and the Push Allowed check box unchecked.

Connector Name	Friendly Name	Review Category	Banner Table Name	Banner Column Name (for temporary gift tables)
spriden_first_name	First Name	GIFT	APBWIDN	APBWIDN_FIRST_NAME
spriden_last_name	Last Name	GIFT	APBWIDN	APBWIDN_LAST_NAME
goremal_email_addr ess_pref	Email	GIFT	APBWIDN	APBWIDN_EMAIL_ADDRES S
Class Code 1 - CUSTOMIZATION REQUIRED	Code 1	GIFT	AGBGHLD	AGBGHLD_GCLS_CODE
Class Code 2- CUSTOMIZATION REQUIRED	Code 2	GIFT	AGBGHLD	AGBGHLD_GCLS_CODE_2
Class Code 3- CUSTOMIZATION REQUIRED	Code 3	GIFT	AGBGHLD	AGBGHLD_GCLS_CODE_3
Comment- CUSTOMIZATION REQUIRED	Comment	GIFT	AGBGHLD	AGBGHLD_COMMENT
Processing Instructions- CUSTOMIZATION REQUIRED	Processing Instructio ns	GIFT	AGBGHLD	AGBGHLD_PROC_INSTR
Matching Gift Company- CUSTOMIZATION REQUIRED	Matching Gift Company	GIFT	AGBGHLD	AGBGHLD_PROC_INSTR

Gift integration review category

A Review Category is available on the Advancement Connector Review Category Validation Form (ATVRCAT). This seed data record contains a Code = GIFT and a Description = Gift Integration.

When you access the AUACMAP form, this value appears in the Review Category field when you select a Data Element to which the category applies.

Gift Integration Profile Category

A Profile Category is available on the Advancement Connector Profile Category Validation Form (ATVPFTP). This seed data record contains a Profile Category = GIFT and a Description = Gift Integration.

When you access the AUACMAP form, this value appears in the Category field in the Valid Profile Categories datablock when you select a Data Element to which the category applies.

AUACDEF

The following components of the Advancement Connector Profile Form (AUACDEF) support gift integration:

- Profile Categories Code Field
- Campaign Code and Control ID Fields
- Gift Integration Pull Profile

Profile Categories Code

The AUACDEF form includes a Category Code field, which allows you to associate a connector profile with a Category Code (GIFT, BIOGRAPHIC). This field is required. Values in this drop-down are validated against the Connector Profile Category Validation Form (ATVPFTP).

Copying a Profile

When you indicate you want to copy an existing profile via the Copy Profile Code drop-down, the list of profiles from which you can copy will be limited to those that have both a matching Transaction Type (pull/push) and a matching Category Code (bio, gift). Only those profiles with matching values for both fields are displayed as options in the Copy Profile Code drop-down.

Campaign Code and Control ID Fields for Gift Category Code

The AUACDEF form includes two fields that are required if the Category Code is GIFT. They are Campaign Code (Banner Code) and Control ID.

Fields	Descriptions
Campaign	Each gift pull profile must be tied to a specific (Banner) Campaign Code. To support this functionality, a new Campaign field is available on the key block on AUACDEF. Values in this drop-down are validated against the Campaign List Form (AFCCAMP).
	Since this field is unique to Gift Profiles, it only appears when a Profile Code that's associated with a gift profile, as indicated in the Profile Categories data block on AUACMAP, is specified. This field does not appear when a non-gift profile is selected.
	Once a gift profile record is added with a Campaign code, the Campaign code can be edited. However, a value must always be provided and the field cannot be blanked out.
Control ID	Each gift pull profile must be tied to a specific Encompass Campaign Control ID. This is the numeric portion of the ID value shown in Encompass on the Manage Campaigns tab (i.e. 899, 500, etc.). This value is used in the web service request to identify the Encompass campaign for which gifts are being requested. Therefore, it is critical that the institution enter the correct value. To support this need, a new Control ID field is available on the key block on AUACDEF.
	Since this field is unique to Gift Profiles, it only appears when a Profile Code that's associated with a gift profile, as indicated in the Profile Categories data block on AUACMAP, is specified. This field does not appear when a non-gift profile is selected.
	Once a gift profile record is added with a Control ID, the Control ID can be edited. However, a value must always be provided and the field cannot be blanked out.

As noted in the previous chart, these fields are maintainable on a Gift Integration Profile. This allows you to modify the Control ID or Campaign of an existing profile, if necessary. Other key fields cannot be modified. If other values are incorrect, delete the profile and add it with the appropriate values. This form does support the establishing of multiple campaigns in Encompass and mapping them to the same Banner Advancement campaign. The set-up for this would include multiple Campaign (gift) Profiles in Banner Advancement, which have the same Campaign value and different Control ID values.

Gift Integration Pull Profile

Gift Integration requires a Pull Profile. Therefore a BANNER GIFT PULL profile is provided as seed data. However, it is important to note that the profile needed to support the Gift Pulls has a few key differences from the Biographic profiles and cannot be used successfully without some modification.

The first difference is that there are additional data elements in the keyblock on the Advancement Connector Profile form (AUACDEF) that are required for Gift profiles. This is spoken to in the section above.

The second difference is the functional purpose of the BANNER GIFT PULL profile. Since a Gift transaction has a more rigid set of fields returned from Encompass, the BANNER GIFT PULL profile only needs to include fields that are not included in the standard Gift Transaction.

Key block data values

The following key block values are associated with the new BANNER GIFT PULL profile:

- Profile Code = BANNER GIFT PULL

- Profile Description = Baseline Gift Pull Profile

- Category Code = GIFT

- Transaction Type = PULL

- Campaign = Update Me

- Control ID = 99999

⚠ **Warning**

The default Campaign code, UPDATE ME, must be configured to represent a Campaign code unique to your institution. Failure to do so will result in an error on AUAINIT that indicates the value must be updated here on AUACDEF. To change this value, make a copy of the BANNER GIFT PULL profile and then modify the UPDATE ME value while current on the copied BANNER GIFT PULL profile. Copying the profile before modifying it preserves the original BANNER GIFT PULL seed data and allows you to refer back to it, if necessary. ∎

Data block values

The fields that are required for a valid Gift Pull profile, and are included in the BANNER GIFT PULL PROFILE include:

Name	Connector Name	Display Order
First Name	`SPRIDEN_FIRST_NAME`	1
Last Name	`SPRIDEN_LAST_NAME`	2
Email Address	`GOREMAL_EMAIL_ADDRESS_PREF`	3

Optional Data block values

Optionally, Gift Integration will support the pulling of six additional 'instance' fields for a campaign. These are optional fields and are not required to be used by institutions. In fact, these mappings are invalid and will not work as delivered. This is because the value entered in the 'Connector Name' column does not map to an actual instance field in Encompass as instance field names (Connector Name) are unique to each institution and to each of their campaigns. These seed data values are provided as placeholders to remind institutions that these particular instance fields are supported for the BANNER GIFT PULL profile if desired.

When configuring a Gift Pull Profile for use at your institution, copy the provided BANNER GIFT PULL profile and name it something more meaningful to your institution. You should then delete these pre-delivered six instance fields and add any unique instance names that you have set-up and are associating with this campaign/Gift Pull profile.

Name	Connector Name	Display Order
Matching Gift Company	`MATCHING GIFT COMPANY - CUSTOMIZATION REQUIRED`	4
Class 1, Class 2, Class 3	`CLASS CODE 1 - CUSTOMIZATION REQUIRED`	5
	`CLASS CODE 2 - CUSTOMIZATION REQUIRED`	6
	`CLASS CODE 3 - CUSTOMIZATION REQUIRED`	7

Name	Connector Name	Display Order
Comment	`COMMENT - CUSTOMIZATION REQUIRED`	8
Processing Instructions	`PROCESSING INSTRUCTIONS - CUSTOMIZATION REQUIRED`	9

The following provides additional information regarding the optional six instance fields:

Name	Encompass Source	Banner Target
Matching Gift Company	Encompass provides a field called Matching Gift Company. This field allows the donor to provide the name of a company that will match the gift.	If a donor provides this information, the pull process will include this information in the Processing Instructions field along with a label that indicates it is the Matching Gift Company Name. As with other gifts that include Processing Information, the Matching Gift Company information will display on the Gift Details tab of AGAWGIF so that the reviewer can see this additional information and use it to accurately update and post the gift.
Class Code 1	Configured as an instance field with a drop-down list on the appropriate Campaign(s) in Encompass. The valid codes should correspond to the valid Class Codes identified in Banner.	Gift Integration supports the same fields that are available for In-Honor and In-Memory, which are supported by Banner Advancement and Banner Advancement Self-Service. These include Class 1, Class 2 and Class 3.

Name	Encompass Source	Banner Target
Class Code 2	Configured as an instance field with a drop-down list on the appropriate Campaign(s) in Encompass. The valid codes should correspond to the valid Class Codes identified in Banner.	See above comments.
Class Code 3	Configured as an instance field with a drop-down list on the appropriate Campaign(s) in Encompass. The valid codes should correspond to the valid Class Codes identified in Banner.	See above comments.

Name	Encompass Source	Banner Target
Comment	Configured as an instance field (text) on the appropriate Campaign(s) in Encompass.	This is a general Comment field that is mapped to the Comment field on the AGAWGIF form. This is similar to the general comment field provided in Banner Advancement Self-Service. Depending on the method you use to add this instance field to your Encompass environment, the value inserted in this field might exceed 300 characters in length. However, when this value is pulled to Banner, the maximum limit is 300 characters. Thus, any Comment value that exceeds 300 characters will be truncated when the value is inserted into Banner for viewing on the Gift Details tab of AGAWGIF or on the standard forms used to view posted gifts. No error or warning will be displayed in Banner indicating the value was truncated. If Comments are truncated as part of this process, and you wish to determine what information was truncated, the balance of the information can be ascertained via Campaign Reporting in Encompass.

Name	Encompass Source	Banner Target
Processing Instructions	Configured as an instance field (text) on the appropriate Campaign(s) in Encompass. This field is designed to allow the donor to provide guidance regarding the intended use of their donation or additional processing instructions. This may be, for example, instructions indication the gift is an In-Honor or In-Memory gift.	This field is available on the Details Tab of the Banner external gift review form (AGAWGIF) to help the gift reviewer ensure the gift is posted appropriately. The Processing Instructions information is stored in a temporary table, not in a permanent Banner table. These are simply temporary instructions that aim to help ensure the gift itself is processed correctly in Banner. If a gift pulled from Encompass has a value in the Processing Instructions field, the gift will automatically have the Review check box checked, indicating it requires review. This will prevent the gift from being mass posted. When this occurs, the gift will need to be posted from the Gift Details Tab on the AGAWGIF form. This method ensures the gift entry operator has viewed the Donor Instructions text prior to processing the gift. Depending on the method you use to add this instance field to your Encompass environment, the value inserted in this field might exceed 2000 characters in length. However, when this value is pulled to Banner, the maximum limit is 2000 characters. Thus, any Processing Instructions value that exceeds 2000 characters will be truncated when the value is inserted into Banner for viewing on the Gift Details tab of AGAWGIF or on the standard forms used to view posted gifts. No error or warning will be displayed in Banner indicating the value was truncated. If Processing Instructions are truncated as part of this process, and you wish to determine what information was truncated, the balance of the information can be ascertained via Campaign Reporting in Encompass.

Payment frequency

In Encompass (the iModules system), the standard frequency values available for use by institutions are listed below. The values on the left are the values shown in the Frequency drop-down in the Encompass user interface. The values on the right are the Frequency

values that are provided in the iModules Web services to indicate the frequency selected by the donor. You can choose not to display all of the options to your donors. However, you cannot add additional frequency options.

Frequency Description in Encompass	Frequency Code passed by the iModules Web service
Monthly	12
Quarterly	4
Twice a year	2
Yearly	1

In Banner, there is a frequency validation table that is maintained on the Frequency Code Validation List (ATVFREQ). Banner has no control over the values that customers populate within the ATVFREQ table. Therefore, customers must set up translation rules for the incoming iModules Frequency codes (1, 2, 4 and 12) to indicate the values from the Banner Frequency Code Validation table that correspond to the four iModules frequency codes.

The customers set-up translation rules using the PAYMENT_FREQUENCY Field Name on the Data Translation Field Value Rules Form (APATRAN). The user must populate the appropriate values on APATRAN to create the necessary mapping so that the incoming iModules frequency codes can be converted to the correct Banner frequency code. An example of these new values is shown in the figure below. As there are other Advancement Connector fields that use APATRAN translation, there is an existing Translation Data Source parameter on the Connector Defaults tab on AGACTRL. This value will also be used to identify the Data Source for frequency translation for the Advancement connector gift integration.

When you use the APATRAN translation function and the values entered below on this form, the incoming iModules frequency code of 1 should be converted to YR for Banner

purposes. An incoming frequency code of 12 should be converted to MO for Banner purposes and so forth.

If the Advancement Connector logic is unable to successfully translate the incoming Frequency value to a valid Banner Frequency value, an error will be reported when the gift pull is performed and the erring gift(s) will not be loaded into Banner. The error message will read as follows:

Missing Pledge Frequency Code - Translation not found on APATRAN

Pledge duration

The concept of pledge duration is handled differently in iModules than in Banner. Advancement Connector logic has been added to calculate the duration so that it can be written to the Duration field on the Pledge Details tab of AGAWGIF.

For example, a donor has entered a $6,000 pledge that is to be paid quarterly with a total of 24 payments, the first payment included with the initial transaction along with 23 remaining payments. When this donation is made in Encompass as a scheduled payment, Encompass indicates that the remaining payments will be placed between July 18, 2013 - Jan 18, 2019. This is provided in small text below the frequency information. Because the scheduled payment transaction is entered on April 18, this date will be used in Banner for the creation of the pledge as well as the initial pledge payment.

In this example, the connector completes the following logic to calculate the pledge duration:

• Number of months between payments

   The logic first calculates the number of months between payments. It uses the current payment date, April 18, and date of the next payment. The latter is the first date of the payment range which is July 18, 2013. Using date math, it is determined there are 3 months between each payment.

• Total months of pledge duration

   The logic then multiples this "Number of months between payments"* (number of remaining payments + 1)

The result is as follows:

3 months between payments * (23+1 payments) = 72-month pledge duration

The value of the pledge duration in months (72 in the above example) is then used to perform a look-up in the Banner Duration Code Validation table viewed on the ATVPDUR form. The table uses this amount to look for a record with a matching value within the Months column, as shown in the figure below. In this case, as there is no matching record with a Months value of 72, this gift would be identified as being in error and the gift would not be loaded into the temporary gift tables for review. The response summary information on the Run History tab of the AUAINIT form would indicate the error and provide the following error description:

Missing Pledge Duration Code - Number of months not found on ATVPDUR

Duration Code Validation ATVPDUR 8.0 (s10b80)

Code	Description	Months	Web Indicator	Activity Date
1	One Year	12	✔	11-MAY-1988
2	Two Years	24	✔	11-MAY-1988
3	Three Years	36	✔	11-MAY-1988
4	Four Years	48	✔	11-MAY-1988
5	Five Years	60	✔	11-MAY-1988
A	Twenty-One months	21	✔	29-APR-2013
B	Seventy-two months	72	✔	07-MAY-2013
E	Eight Months	8	✔	30-APR-2013
F	Five Months	5	✔	03-MAY-2013
H	Six Months	6	✔	11-MAY-1988
N	Nine Months	9	✔	04-MAR-2013
Q	Three Months	3	✔	01-DEC-2005
R	Two Months	2	✔	05-APR-2013
S	Twenty-Seven Months	27	✔	30-APR-2013
T	Ten Months	10	✔	27-FEB-2013
V	Sisxty-Nine Months	69	☐	09-MAY-2013
W	Twenty-Three Months	23	✔	09-MAY-2013
X	Twenty-Two Months	22	✔	09-MAY-2013
Z	Eleven Months	11	✔	09-MAY-2013
			☐	
			☐	

To address this error, the appropriate Banner user would need to insert a record on the ATVPDUR form that had the matching months value. The user could then run another pull with selection criterion that would include this gift. This pull should result in the gift being successfully pulled, unless there are other errors associated with the gift.

Adjustments required for scheduled payments entered before 8.6.1

If your institution allowed donors to make scheduled payments in Encompass prior to your upgrade, the 8.6.1 release provides a method to link the unique Encompass pledge ID to the corresponding Banner Pledge. Any subsequent pledge payments pulled from iModules are automatically associated with the correct Banner ID and pledge #.

Banner pledge and the external pledge ID # assigned to that same pledge by iModules. When an adjustment is made to a pledge on the AGAADJS form, a new External Pledge field displays on the bottom of the Pledge Adjustment form. In this field, enter the unique pledge id assigned to the scheduled payment transaction by iModules. You should make these adjustments as part of the set-up prior to your institution's go-live for this upgrade. When this adjustment is made and saved, this Banner pledge is now associated to the corresponding Encompass pledge. Therefore, when a pledge payment (gift) is pulled over from Encompass, Banner logic searches through the various Banner pledges in both the permanent pledge table (AGBPLDG_EXT_PLEDGE_ID) and the temporary pledge table (AGBEPLG_EXT_PLEDGE_ID), looking for one that contains the value that matches the external pledge id provided by iModules. When found, the Banner logic automatically associates this incoming pledge payment to the Banner ID and pledge number. This pledge payment displays as an authenticated gift (pledge payment) on AGAWGIF.

⚠ **Warning**

> It is absolutely critical that the institution assign the correct externalpledge id to the correct Banner ID and Banner pledge. If this association is not set up correctly when performing the above adjustments, then subsequent pledge payments pulled from Encompass will be associated, automatically, to the incorrect Banner ID and Pledge.　■

Setting up Designations in Encompass

When defining a Designation in Encompass, the Designation IDs functionality is used to tie an Encompass Designation to a Banner Designation code. To facilitate this, there must be a value of 'Banner Designation Code' that can be selected from the Designation IDs drop-down option. For any designations that can potentially be on a one-time or perpetual gift that is pulled over to Banner, institutional personnel must then select that 'Banner Designation Code' drop-down for the Designation IDs field, enter the actual Banner designation code as the Value for that Designation ID and Save.

If this is not done or there is a type-o in either the Designation ID or the Value, gift integration will not be able to successful identify the appropriate designation code. Instead, an error will display when this gift is reviewed on the AGAWGIF form and the user will be required to enter the appropriate valid Banner designation code.

Setting up instance fields In Encompass

If you want to include any of the six supported instance fields for any of your campaigns, certain set-up steps are required. The following describes these steps.

1. Identification of instance fields in Encompass for appropriate campaigns.

   When adding a new field to a campaign form in Encompass, the check box labeled 'Make this an instance field' must be checked. If this is not checked, then the gift integration for this field will not function properly and is not supported. The value that is entered in the 'Export Column Header' field in Encompass will also be the unique

Connector Name that you will be using in Step 2.1 below. Please make note of this value. Please work with iModules directly if you require any assistance in understanding how to setup an instance field on a campaign.

For example: For your Annual Fund campaign, you would like to include the Processing Instructions field. Therefore, you add it as an instance field for that campaign with an 'Export Column Header' name of '2012 Annual Fund:Processing Instructions'.

2. Identification of these instance fields on the AUACMAP form.

Since instance names in Encompass are unique by institution and by campaign, your institution must identify this unique name to Banner so it will understand the appropriate column to interrogate when trying to pull over this value for a particular Gift Pull Profile (and campaign). The following two steps are required:

2.1. Insert a new Data Elements record in the top data block on the AUACMAP form.

Since your institution has a new 'instance' field that isn't yet known to Banner, the first step is to identify this data element to the master list of data elements supported for the Advancement Connector. This is done on the AUACMAP form using the Record Insert action.

To make this easier, the BANNER GIFT PULL profile has a seed data record for each of the six instance fields supported for Gift Integration. All of these can easily be found by filtering the view on AUACMAP to include only those that have a Connector Name containing the word 'Customization.'

If you view these existing seed data records, it provides the majority of the values you would need for your 'instance' record. The only piece of information that will vary by institution is the Connector Name value. This should be equal to the value you have for this instance field in Encompass in the 'Export Column Header' attribute.

For example: To identify the Processing Instructions instance field that I added to my Annual Fund campaign in Encompass, I would insert a new record that had the same data as the seed data record with the Connector Name 'PROCESSING INSTRUCTIONS - CUSTOMIZATION REQUIRED'. Instead of the above connector name, for my new record, the value would instead be '2012 Annual Fund: Processing Instructions' which is the exact value from the 'Export Column Header' attribute of the Encompass instance field.

Both the Processing Instructions and the Matching Gift Data are mapped to the AGBGHLD_PROC_INSTR table and column. Therefore, a label will display in front of each value so the user can easily understand the data they are viewing in that one field. The label that will be displayed in the Processing Instructions field on AGAWGIF (Gift Details tab) is defined by the value in the Friendly Name field on AUACMAP for these two records. Institutions have the option of

modifying the text in the Friendly Name field for these records to customize those labels if desired. The order in which these two fields display in the Processing Instructions field (assuming both values are being populated and pulled over with Gifts) is dictated by the Display Order value for the data element on AUACMAP and can be modified by the institution of a different order is desired.

2.2. Associate this new data element to the Gift Category on the bottom data block entitled 'Valid Profile Categories'.

Once you have added the mapping for this instance field for this particular campaign, you then need to assign it the Gift Category in the Valid Profile Categories datablock at the bottom of this form. It should be marked as active and have the 'Pull Allowed' check box checked. This now makes this data element available to be added to any Gift Pull profile.

3. Add this data element to the appropriate Gift Pull Profile on the AUACDEF form.

You can add this campaign-specific instance field to the appropriate Gift Profile being used for that campaign.

Given that the 'Export Column Header' value is required by Encompass to be unique across all campaigns, you will need to do the above steps for every one of these supported instance fields you choose to include on every campaign. So, as an example, if you only wanted to add the Processing Instructions form to your campaigns and pull that one 'instance' field over to Banner but you had six campaigns, you'd need to add six unique data element records to AUACMAP and then add them to the appropriate six Gift Pull Profiles per the instructions above.

Gift pull initiation

This section describes initiating the pulling of gifts from Encompass to Banner Advancement after the initial setup is performed. As part of this process, the following forms in Banner need to be examined:

• AUAINIT (Initiation tab, Scheduler tab and Run History tab)

AUAINIT – Initiation tab

Since there are two kinds of integration (Biographic and Gift), a Category Code field is available on the initiation tab on the Advancement Connector Initiation Form (AUAINIT). When you select a Category from this drop-down, values in the Profile Code list below will be filtered and will only display profiles associated with the selected category in this field.

• If Initiation Selection = Push, and Category Code = Biographic, only the Biographic push profiles display.

- If Initiation Selection = Push and Category Code = Gift, no profiles display as none are supported at this time. However, if your institution has customized the Advancement Connector and has, for some reason created Gift Push profile(s), they would display.

- If Initiation Selection = Pull and Category Code = Biographic, only the Biographic Pull profiles display.

- If Initiation Selection = Pull and Category Code = Gift, only the Gift Pull profiles display.

AUAINIT – Scheduler tab

Since there are two kinds of integration (Biographic and Gift), a Category Code field is available on the Scheduler tab on the Advancement Connector Initiation Form (AUAINIT). When you select a Category from this drop-down, values in the Profile Code list below will be filtered and will only display profiles associated with the selected category in this field.

- If Initiation Selection = Push, and Category Code = Biographic, only the Biographic push profiles display.

- If Initiation Selection = Push and Category Code = Gift, no profiles display as none are supported at this time. However, if your institution has customized the Advancement Connector and has, for some reason created Gift Push profile(s), they would display.

- If Initiation Selection = Pull and Category Code = Biographic, only the Biographic Pull profiles display.

- If Initiation Selection = Pull and Category Code = Gift, only the Gift Pull profiles display.

AUAINIT – Run History tab

Since there are two kinds of integration (Biographic and Gift), the Run History tab on the Advancement Connector Initiation Form (AUAINIT) includes the following items in order to support gift integration.

Profile Category

A new Category Code field was added to help the user understand the type of profile that was run (Gift, Biographic).

Count

The Count in both the Initiation Requests and the Associated Batches data blocks represents the number of gifts pulled back as part of that Request ID. This would include all gift transactions returned by Encompass for that Gift pull request, regardless of

whether the Banner gift integration logic subsequently identified error conditions and reports any of these gifts as errors.

Status values for Gift Pulls

When a gift pull is requested and the pull is executed successfully, the status on the Run History form will be one of the following. In most cases the status will be Completed or Completed with Errors:

Fields	Descriptions
Completed	All gift records included in the pull were successfully loaded into the external gift tables (APBWIDN, AGBGHLD and AGRGHDE).
Completed with Errors	There was at least one gift record that could not be loaded because it did not pass the validation logic. This may be due to an error identified by Encompass or the Banner pull logic. See the section below entitled 'Gift error display' for additional information.
Initiated	The pull request is in-process.
No Changes	There were no new gifts that qualified for inclusion in the pull.
Failed	There was a larger system or service failure that caused the entire pull request to fail. As a result, no gift records were pulled over.

Note

You might momentarily notice a gift pull contains a status of 'Review'. If this occurs, this temporary status can be ignored as it simply indicates the request is being processed.   ■

Warning

Since the review of pulled gifts does not occur on the Connector review form, the updating of the status from Review to Completed does not apply. Once the pull is completed successfully, you must use the Review External Gifts Form (AGAWGIF) to review these pulled gifts.   ■

Gift error display

When a pull results in a status of Complete with Errors, additional information can be viewed in order to understand the gifts that were identified as having errors. This error

information can be viewed by selecting the Response Summary icon on the Run History tab in the Associated Batches data block where the batch level information is displayed. When the Response Summary is displayed, you will see four counts at the top, followed by any error information. The four counts at the top include the number of Total Constituents, Total Pledges, Authenticated Gifts and Unauthenticated Gifts.

Additional information in the Response Summary for each individual error includes the following:

Fields	Description
Total Constituents	This value indicates how many constituents had gifts in this pull.
	This count reflects constituents for all gifts returned by the Encompass web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Authenticated Gifts	This value provides a count of all gifts pulled for this Request ID, which had a Banner PIDM in the Constituent ID data element provided by Encompass.
	This count reflects all gifts returned by the Encompass web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Unauthenticated Gifts	This value provides a count of all gifts pulled for this Request ID, which did not have a Banner PIDM in the Constituent ID data element provided by Encompass.
	Note: This count reflects all gifts returned by the iModules web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Total Number of Errors	The total count of errors identified by Banner logic for the gifts provided by the Encompass web service for this Pull Request ID. If one gift has more than a single error, all errors will be included in this total.
	For example: Gift X has 2 errors. This would be counted as 2 in the 'Total Number of Errors' count and two separate sets of error information would be provided for that gift in the error detail provided at the bottom of the Response Summary.

Fields	Description
Transaction ID	This is the unique Banner push/pull Request ID, as provided by Encompass.
Name	This is name pulled from Encompass. The format is First Name, followed by a space, then Last Name.
PIDM	If available, this is the PIDM associated with the erroneous gift (provided in the constituent ID data element in the Encompass Transaction Query).
External ID	This is the Encompass Member ID of the donor, as provided by Encompass.
Gift Number	This is the unique Gift ID, as provided by Encompass.
Pledge Number	This is the unique Pledge ID, as provided by Encompass.
Error Message	This text indicates what scenario caused the gift to be rejected.

Email notification for successful gift pulls

When a scheduled gift integration pull is successful, an email will be sent to the designated recipient. As with the Bio push/pull process, the message will contain a standard set of information (Request ID, Type, Date Run, Status, Profile Code and Frequency). Additionally, the message will include the following gift-specific information.

Fields	Descriptions
Total Constituents	This value indicates how many constituents had gifts in this pull.
	Note: This count reflects constituents for all gifts returned by the Encompass web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.

Fields	Descriptions
Authenticated Gifts	This value provides a count of all gifts pulled for this Request ID, which had a Banner PIDM in the Constituent ID data element provided by Encompass.
	Note: This count reflects all gifts returned by the Encompass web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Unauthenticated Gifts	This value provides a count of all gifts pulled for this Request ID, which did not have a Banner PIDM in the Constituent ID data element provided by Encompass.
	Note: This count reflects all gifts returned by the iModules web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.

Email notification for Gift Pulls with a Complete with Error Status

When a pull results in a status of Complete with Errors, additional information will be included in the email notification. This information is meant to assist in identifying which gifts had errors and were not pulled over to Banner.

The additional information that displays in the email includes a count of gift transaction errors along with the same information that displays on the Response Summary, as described earlier.

Error Identification Logic

When pulling gifts from Encompass, Banner Advancement performs certain checks prior to loading the gift transactions for review. If certain error conditions exist, the gift transactions are not loaded into the gift temporary tables (APBWIDN, AGBGHLD and AGRGHDE). Instead, the transactions appear on the gift error display.

If a transaction has more than one error, each individual error will be a part of the error count shown on the Response Summary on the Run History tab and the error information for each particular error will be reported separately. For example, if the gift pull contained 1 gift that was authenticated and the gift contained 3 errors, the Total Number of Errors would be 3 and all errors will have the same gift number.

The following errors were added in order to support gift transactions:

Error Message	Description
ID does not exist in Banner or Name information is missing	The gift transaction has neither a valid PIDM nor a Last Name value. To be loaded into the temporary gift tables, either: • A valid PIDM must exist, which indicates an authenticated gift. OR • Last Name must be populated to provide enough information for an unauthenticated gift.
Gift has already been processed	The gift transaction has already been posted to Banner. As part of this process, the following fields are examined to determine if the gift has been posted from this source, for this Banner ID. These fields are checked for both gifts posted into Banner as well as the other gifts currently in the temporary gift tables: • External Gift Number • Banner ID • Data Origin • Gift Date
Missing Total Gift Amount	The gift transaction is missing a value for the total gift amount.
Missing Detail Amount	The gift is missing an amount value for a designation.
Missing Gift Type Code– Please set-up default on AGACTRL	The gift type code is missing. For gifts from Encompass, this is a reminder to the institution to fill in the Gift Type code on AGACTRL. If this error is encountered, the appropriate Gift Type Code should be entered on AGACTRL. Once the value is specified and the user tries the Gift pull again, this error will no longer appear.
Invalid Gift Type Code – Please check default value on AGACTRL	This error would only occur if the default gift type value set-up on AGACTRL has become invalid for some reason.
Skip Billing Transactions Not Supported	The transaction does not include Billing Information and represents a 'Skip Billing' transaction entered by an Admin in Encompass, which is not supported.

Error Message	Description
Invalid Gift Class Code 1	Indicates that the value pulled from Encompass for the Gift Class Code 1 does not have a corresponding valid value in Banner. To resolve this issue, review the valid values for this field in both Encompass and Banner to make sure they are in-synch. Once the issue is resolve, pull this gift again and the error should not appear.
Invalid Gift Class Code 2	Same description as Invalid Gift Class Code 1, but for Class Code 2.
Invalid Gift Class Code 3	Same description as Invalid Gift Class Code 1, but for Class Code 3.
State Code does not exist	Indicates the value pulled from Encompass for the State Code for an unauthenticated gift does not have a corresponding valid value in Banner. To resolve this issue, review the valid values for this field in both Encompass and Banner to make sure they are in-synch. Once the issue is resolved, pull this gift again and the error should not appear.
Nation Code does not exist	Indicates the value pulled from Encompass for the Nation Code for an unauthenticated gift does not have a corresponding valid value in Banner. To resolve this issue, review the valid values for this field in both Encompass and Banner to make sure they were in-synch. Once the issue is resolved, pull this gift again and the error should not appear.
Pledge has already been processed	Indicates the gift pull included initial scheduled payment transactions that you have already pulled, whether authenticated or unauthenticated. This will typically occur when you are running a scheduled or manual pull that is for a timeline - or includes a timeline - that was included in a previous pull.
Missing Pledge Frequency Code - Translation not found on APATRAN	Indicates the Advancement Connector logic was unable to successfully translate the incoming Frequency value to a valid Banner Frequency value. See "Payment frequency" for details on how to resolve this issue.

Error Message	Description
Missing Pledge Duration code - Number of months not found on ATVPDUR	Indicates there is no matching pledge duration value in the Banner Duration Code Validation table viewed on the ATVPDUR form. See "Pledge duration" for details on how to resolve this issue.
Missing Banner Pledge #	Indicates one of the following two scenarios: • The institution is trying to pull over a subsequent pledge payment but they have not yet pulled over the original scheduled payment transaction that is used to create the corresponding pledge in Banner. Therefore, the pledge does not yet exist in Banner. • The institution used Encompass and allowed entry of scheduled payment transactions prior to upgrading to this release. Additionally, the institution has not yet performed the set-up step that allows them to link the unique encompass pledge # to an existing Banner pledge number so that subsequent pledge payments on a scheduled payment transaction can be handled by Banner. To correct this error, you must link the unique Encompass pledge ID to the correct corresponding Banner Pledge. See "Adjustments required for scheduled payments entered before 8.6.1" for details on how to resolve this issue.

Merge Gift Pull Timeline Considerations

The iModules gift-related web services are structured so they only provide gifts to Banner after any necessary review has been performed on a gift transaction (primarily for member-merge types of functionality). iModules has worked out a method to ensure this is transparent to those using the gift-related web services so the user does not have to do any special processing other than performing their normal hourly, daily or weekly gift pulls. However, please be aware that this potentially will result in a delay before certain gifts may be available to be pulled over to Banner. Please be sure your institution works with iModules personnel to understand any impact this may have on the delay of gifts being available for the Banner Advancement Connector Gift Integration.

Gift Review functionality

As with other external gifts that are loaded into Banner Advancement, the Gifts pulled from Encompass will be reviewed & processed using the Review External Gifts forms – AGAWGIF and APAWPRS. The following speaks only to these forms to allow reviewing of the Encompass gifts.

Viewing Processing Instructions

Any processing instructions that the donor provides in Encompass will display in a new Processing instructions field, which is visible on the Gift Details tab in AGAWGIF. Information in this field is inquiry-only.

When you access this field, instructions appear in the lower-left indicating this field contains "Additional Processing Instructions from the donor to help ensure this gift is posted per the donor's wishes."

Modifying the Gift Type value

When you access the Gift Type field to modify the value, the field will display a new drop-down, which validates against ATVGIFT. This is the same fashion in which the Gift Type field appears on the AGAGIFT form.

Handling gifts with no Designation

If a gift is pulled from Encompass and contains no designation, Banner will not allow you to save or post the gift. When this situation occurs, you must enter a Designation and it must be one that is valid for the Campaign.

> 📄 **Note**
>
> If you attempt to check the 'OK to Load' check box and the Designation value is missing, you will receive an error that indicates the Designation value is required to create gifts. Under these circumstances you will be allowed to save any changes on the Gift Details tab. However, you will not be allowed to check the 'OK to Load' check box while this error condition exists. ∎

Viewing Processing Instructions for Billing Phone

When billing information is pulled for unauthenticated gifts, the billing phone information from Encompass is passed to Banner as a text field. This information can be viewed on the APAWPRS form in a new inquiry-only field named Processing Instructions. The telephone number that appears in this field will contain a prefix of Billing Phone: and will be followed by the actual number.

> 📄 **Note**
>
> This data is only stored in APBWIDN. It is not stored in any of the permanent bio or gift tables since it is used to facilitate the communication of this data from Encompass to inform the user of the need to transcribe the number into the appropriate phone fields. ∎

> ⚠️ **Warning**
>
> If you choose the Create Constituent option and there is data in the Processing Instructions field, but there is no data in the apbwidn_phone_number field, a warning message will indicate the

Processing Instructions contains data but no phone number value has been entered. This message aims to help ensure you don't inadvertently miss the opportunity to transcribe phone information into the phone fields.■

Display of Encompass Data on AGAWGIF

The following provides a listing of the various data elements that can be seen on the AGAWGIF and APAWPRS forms and indicates how and if they are supported for the Advancement Connector Gift Integration.

AGAWGIF – Gift Details tab

Anywhere that it says 'Not Supported' is simply an indication the data element is not pulled over from Encompass via the Gift Integration. Any exiting functionality tied to that data element on the External Gift forms continues to apply.

Field Label	Gift Integration Support	Configuration Requirements
External ID	Provided by iModules in the gift web service response. Represents the unique id of the member in Encompass (member id).	None
Banner ID	Provided by iModules in the gift web service response if available. If provided and the Banner ID is valid, this indicates an authenticated gift. This field will be blank for unauthenticated gifts.	None
OK to Load	This is used by standard external gift review functionality and its purpose or use has not changed.	None
Gift Number	This unique Banner Gift Number value is assigned by Banner, per standard external gift processing.	None
Gift Type	This is not provided by Encompass. Instead this value is populated based on the default Gift Type identified on AGACTRL.	AGACTRL

Field Label	Gift Integration Support	Configuration Requirements
Date	Provided by iModules in the web service response. Represents the date the gift was made by the donor.	None
Amount	Provided by iModules in the web service response. Represents the total gift amount.	None
Fiscal Year	This gets populated with the ATVFISC_CODE where the gift_date is between the atvfisc_start_date and the atvfisc_end_date.	None
Entry Date	This is populated by Banner with the sysdate (system date).	None
Vehicle	Not supported	None
Match Form	Not supported	None
Category	• For an authenticated gift, this value is the Donot Category value associated with the Banner ID. • For an unauthenticated gift, if a default value for Donor Category has been entered on AGACTRL, that value will default when the gift is loaded into the temporary gift tables. • Donor Category will get updated on the AGAWGIF form (agbghld table) if a change is made on the APAWPRS form (apbwidn table).	AGACTRL
Class 1	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field
Class 2	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field
Class 3	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field

Field Label	Gift Integration Support	Configuration Requirements
Authorization	Provided by iModules in the web service response.	None
Reference	Not supported	None
Comment	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field
Processing Instructions	Supported for Gift Integration via specific use and configuration of an Encompass instance field. This field will potentially contain information for two Encompass fields – Processing Instructions and Matching Gift Company.	Instance field
External Gift ID	Provided by iModules in the web service response. Represents the unique external gift ID assigned by Encompass.	None
User	The user responsible for pulling this gift over to the Banner temporary gift tables for review. If done manually, this will reflect the user initiating the pull. If done by the scheduler, this will have the value ADVCONN.	None
Origin	For gifts pulled from Encompass through the Advancement Connector, the Origin value will always equal AUKEXGF. This is set by Banner logic.	None
Activity Date	The date this record was last updated. This is initially set to the date and time the temporary gift records are created in Banner.	None
Solicitor Information	iModules Gift Integration does not support the pulling of the Solicitation, Organization or ID fields from Encompass. However, per current functionality, when reviewing a gift the user is able to make modifications to these fields on the Gift Details tab if desired.	N/A

Campaign and Designation Details

Field Label	Gift Integration Support	Configuration Requirements
Gift Amount	Provided by iModules in the web service response. Represents the individual amounts for each designation.	None
Pledge	Not supported	N/A
Campaign	This is set to the Campaign value on the Gift Pull Profile used to pull over this gift.	Gift Pull Profile set-up on the AUACDEF the form.
Designation	Provided by iModules in the web service response. Represent the individual designation(s) for the gift.	Instance field

AGAWGIF – Pledge Details tab

Field Label	Gift Integration Support	Configuration Requirements
Accepted	Not supported	N/A
Spouse Split	Not supported	N/A
Pledge	Not supported	N/A
Individual Rules	Not supported	N/A
Amount	Provided by iModules in the web service response. Represents the total pledge amount.	None
Institution Rules	Not supported	N/A

Field Label	Gift Integration Support	Configuration Requirements
Date	Provided by iModules in the web service response. Represents the date the pledge was made by the donor.	None
Fiscal Year	This gets populated with the ATVFISC_CODE where the pledge_date is between the atvfisc_start_date and the atvfisc_end_date	ATVFISC
Status	This is not provided by Encompass. Status codes are defined on the Membership Status Code Validation Form (ATVAMST)	None.
Type	This is not provided by Encompass. Instead this value is populated based on the default Pledge Type identified on AGACTRL. If the default is not defined on AGACTRL, you must enter the pledge type on AGAWPLG before the pledge can be accepted and stored in Banner.	AGACTRL
Pledge Class 1	This is not provided by Encompass. Instead this value is populated based on the default pledge classification specified on ATVPCLS.	ATVPCLS
Pledge Class 2	This is not provided by Encompass. Instead this value is populated based on the default pledge classification specified on ATVPCLS.	ATVPCLS
Pledge Class 3	This is not provided by Encompass. Instead this value is populated based on the default pledge classification specified on ATVPCLS.	ATVPCLS
Vehicle	Not supported.	None
Comments	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field
Reminder	Provided by iModules in the web service response. Represents the reminder code for the installment.	None
First Bill Date	This is populated by Banner with the sysdate(system date).	None

Field Label	Gift Integration Support	Configuration Requirements
External Next Payment Date	Provided by iModules in the web service response. Represents the date that the next payment will be taken by the external party providing this pledge information.	None
Frequency	Provided by iModules in the web service response. Represents the frequency of the installments.	ATVFREQ
Last Bill Date	This is populated by Banner with the sysdate(system date). Represents the frequency of the installments.	None
Duration	Provided by iModules in the web service response. Represents the duration of the installments.	None
Campaign 1	This is set to the Campaign value on the Gift Pull Profile used to pull over this gift.	Gift Pull Profile set-up on the AUACDEF the form.
Campaign 2	This is set to the Campaign value on the Gift Pull Profile used to pull over this gift.	Gift Pull Profile set-up on the AUACDEF the form.
Campaign 3	This is set to the Campaign value on the Gift Pull Profile used to pull over this gift.	Gift Pull Profile set-up on the AUACDEF the form.
Designation 1	This is set to the Campaign value on the Gift Pull Profile used to pull over this gift.	Gift Pull Profile set-up on the AUACDEF the form.
Designation 2	This is set to the Campaign value on the Gift Pull Profile used to pull over this gift.	Gift Pull Profile set-up on the AUACDEF the form.

Field Label	Gift Integration Support	Configuration Requirements
Designation 3	This is set to the Campaign value on the Gift Pull Profile used to pull over this gift.	Gift Pull Profile set-up on the AUACDEF the form.
Amount 1	Provided by iModules in the web service response. Represents the pledge amount for the campaign/designation combination.	None
Amount 2	Provided by iModules in the web service response. Represents the pledge amount for the campaign/designation combination.	None
Amount 3	Provided by iModules in the web service response. Represents the pledge amount for the campaign/designation combination.	None

APAWPRS – Person Information tab

Field Label	Gift Integration Support	Configuration Requirements
External ID	Provided by iModules in the gift web service response. Represents the unique id of the member in Encompass (member id).	None
Processed	Standard Banner functionality.	N/A
Generate ID	Standard Banner functionality.	N/A

Field Label	Gift Integration Support	Configuration Requirements
Banner ID	Provided by iModules in the gift web service response if available. If provided and the Banner ID is valid, this indicates an authenticated gift. This field will be blank for unauthenticated gifts. **Note:** To ensure you do not add a new Banner ID for someone who already exists in your Banner database, use the 'Common Matching Entry' from the Options menu on APAWPRS to perform a lookup on the donor name to determine if the unauthenticated donor already exists in Banner. If so, simply associate this unauthenticated gift to that existing Banner individual.	None
Last Name Prefix	Not supported	N/A
Last Name	Provided by iModules in the gift web service response.	None
First Name	Provided by iModules in the gift web service response.	None
Middle Name	Not supported	N/A
Prefix	Not supported	N/A
Suffix	Not supported	N/A
Date of Birth	Not supported	N/A
Gender	Not supported	N/A
Maiden Name	Not supported	N/A
Donor Category	If this is an unauthenticated gift, if a default value for Donor Category has been entered on AGACTRL, that value will default when the gift is loaded into the temporary gift tables.	AGACTRL
Preferred Class	Not supported	N/A
Preferred College	Not supported	N/A
Last Login Date	Not supported	N/A

Field Label	Gift Integration Support	Configuration Requirements
Spouse Information (four name-related fields)	Not supported	N/A
User	The user responsible for pulling this gift over to the Banner temporary gift tables for review. If done manually, this will reflect the user initiating the pull. If done by the scheduler, this will have the value ADVCONN.	None
Activity Date	The date this record was last updated. This is initially set to the date and time the temporary gift records are created in Banner.	None
Gifts Exists	Standard functionality. This gets checked on the form if a record is found in AGBGHLD for the APBWIDN_ID	None
Address Information Exists	Standard functionality. If any of the APBWIDN address fields are populated then this will be checked.	None

APAWPRS – Address Information tab

The below biographic and address information is only pulled over from Encompass for unauthenticated gifts. If it is an unauthenticated gifts, the Billing address information entered by the donor will be displayed to at least provide the one known address for this unauthenticated donor.

Field Label	Gift Integration Support	Configuration Requirements
Address Type	This is not provided by Encompass. Instead this value is populated based on the default Address Type identified on AGACTRL.	AGACTRL
House Number	Not supported	N/A
Street Line 1	Provided by iModules in the gift web service response.	None
Street Line 2	Provided by iModules in the gift web service response.	None
Street Line 3	Not supported	N/A
Street Line 4	Not supported	N/A
City	Provided by iModules in the gift web service response.	None
State or Province	Provided by iModules in the gift web service response.	Ensure codes in both systems match so no errors occur when pulling to Banner.
Zip or Postal Code	Provided by iModules in the gift web service response.	None
County	Not supported	N/A
Nation	Provided by iModules in the gift web service response.	Ensure codes in both systems match so no errors occur when pulling to Banner.
Processing Instructions	Provided by iModules in the gift web service response.	Instance field

Field Label	Gift Integration Support	Configuration Requirements
Telephone Type	This is not provided by Encompass. Instead this value is populated based on the default Address Type identified on AGACTRL.	AGACTRL
Phone Number Components	The billing phone number entered by the unauthenticated donor will display in the Processing Instructions field on the Address Information tab of APAWPRS. This information can be reviewed and then copied and pasted into the appropriate phone number components. The format of this field in Encompass does not allow direct mapping into the Banner Phone number fields.	Require cut & paste by reviewer into the appropriate phone number component fields.
Fax Type and Phone Number Components	Not supported	N/A
Email Type	This is not provided by Encompass. Instead this value is populated based on the default Email Type identified on AGACTRL.	AGACTRL
Email Address	Provided by iModules in the web service response. This represents the email address provided by the unauthenticated donor with their billing information when making the gift.	None

Schedule the transfer of data

Banner Advancement provides optional functionality for scheduling the transfer of data between Banner and iModules's Encompass product. This functionality allows your institution to set predefined schedules for the automatic running of push and pull profiles. These Scheduler records then automatically initiate these runs at the requested dates and times, relieving your staff of having to initiate them manually.

Scheduler tab

The Scheduler tab is used to add, modify, and delete Scheduler records.

This tab includes the following fields:

Fields	Descriptions
Active	Check box to indicate whether the scheduler record is active or inactive. This check box is unchecked by default.
	Selecting this field indicates that this scheduler record should be effective immediately. The Scheduler functionality would then automatically initiate the push or pull profile at the frequency indicated on the Scheduler record.
Profile Type	Indicates whether the data transfer is pushing data from Banner to Encompass or pulling data from Encompass to Banner.
Profile Code	Profile that should be used for data transfer. If the Profile Type is Push, only Push profiles are displayed. If the Profile Type is Pull, only Pull profiles are displayed.
	You can select the code from the list of values.

Fields	Descriptions
Frequency	Desired frequency. You can select the frequency as hourly, daily or weekly from the drop-down list. The data elements displayed for frequency will vary based on the frequency selected.
	If you select the Hourly frequency, the **Hours** field appears and you must enter a value between 1 and 23. For example, an Hourly frequency, a 4 hour interval and a Start Time of 12:00pm indicates the scheduler will run for the first time at 12:00pm, then at 4:00pm, 8:00pm, 12:00am, etc. If the frequency is odd, the scheduler might run at different times every day but will always run at the specified interval. For example, a 5 hour interval and a Start Time of 12:00pm indicates the scheduler will run for the first time at 12:00pm on day 1, then at 5:00pm and10:00pm. On day 2 the scheduler will run at 3:00am, 8:00am, 1:00pm, etc.
	If you select the Daily frequency, the **Exclude Weekends** check box is displayed. Select or deselect the check box as per your requirement.
	If you select the Weekly frequency, check boxes for all the days in a week (Sunday to Saturday) are displayed. You can select the appropriate check boxes to indicate on which days you want the Scheduler record to be initiated.
Start Time	Time the scheduler initiates the push or pull.
	Use the HHMM format with valid values 0000 through 2359. For example, if the start time is 10:30 PM, enter 2230.
Selection Begin Date	Date that should be used for the initial run of this data transfer to select qualifying records to be pushed or pulled.
	If the user modifies the value in this field, the system automatically removes any values in the **Last Successful Run Date** and **Time** fields. Changes to the value in this field are considered a re-initialization of this Scheduler record.
Selection Begin Time	Time that should be used for the initial run of this data transfer to select qualifying records to be pushed or pulled.
	Use the HHMM format with valid values 0000 through 2359.
	If the user modifies the value in this field, the system automatically removes any values in the **Last Successful Run Date** and **Time** fields. Changes to the value in this field are considered a re-initialization of this Scheduler record.

Fields	Descriptions
Last Successful Run Date	Last date when this profile was initiated successfully by this scheduler record. This field is display only. Each time a push/pull request is successfully initiated by this Scheduler record, the **Last Successful Run Date** and **Time** fields are populated. These values are then used as the **Selection Begin Date** and **Time** parameters for the subsequent push/pull requests for this Scheduler record. The Last Successful Run Date for a scheduler record reflects both the manual and the scheduled runs. When the user manually initiates a push or a pull request and it is completed successfully, the **Last Successful Run Date** for the scheduler record for this profile is updated.
Last Successful Run Time	Last time when this profile was initiated successfully by this Scheduler record. This field is display only. Each time a push/pull request is successfully initiated by this Scheduler record, the **Last Successful Run Date** and **Time** fields are populated. These values are then used as the Selection Begin Date and Time parameters for the subsequent push/pull requests for this Scheduler record. The Last Successful Run Time for a Scheduler record reflects both the manual and the scheduled runs. When the user manually initiates a push or a pull profile and it is completed successfully, the **Last Successful Run Time** for the Scheduler record for this profile is updated.
User	User who last maintained this record. This field is display only.
Activity Date	Date when the record was last modified. This field is display only.
Notification Email 1	The first e-mail that should be automatically notified when this scheduled job is executed. This field is optional.
Notification Email 2	The second-mail that should be automatically notified when this scheduled job is executed. This field is optional.
Notification Email 3	The third e-mail that should be automatically notified when this scheduled job is executed. This field is optional.
Notification Email 4	The fourth e-mail that should be automatically notified when this scheduled job is executed. This field is optional.

Adding a new scheduler record

You can add one Scheduler record per profile. This Scheduler record is either active or inactive. You are not allowed to add another Scheduler record for the same profile. If you try this, you get the following error message:

ERROR Only one scheduler record for a profile is allowed.

Use the following steps to add a new Scheduler record for a profile and initiate it from the Scheduler tab.

1. Access the Advancement Connector Initiation Form (AUAINIT).

2. Select the Scheduler tab.

3. Select Insert from the Record menu.

4. Indicate whether the Scheduler record is active or inactive.

5. Select a profile type from the **Profile Type** drop-down list.

6. Select the profile code from the **Profile Code** drop-down list.

7. Select the frequency from the **Frequency** drop-down list.

8. Enter the time you want to initiate the push or pull in the **Start Time** field.

    📒 **Note**

    > Please be sure that you refer to the published guidelines provided by iModules regarding the use of Web services. These will help your institution better understand iModules recommendations regarding record volume, time of day recommendations for larger transactions sets, configuration settings, etc. ■

9. Enter the date when you want the selection to begin in the **Selection Begin Date** field.

10. Enter the time when you want the selection to begin in the **Selection Begin Time** field.

11. If you want an e-mail notification about the status of the scheduled job, enter an e-mail id in one of the four e-mail notification fields, as required.

12. Save the changes.

When the Scheduler record initiates a push request, the request selects the changes that occurred since the last time this process was successfully initiated by this Scheduler record. If there is no prior run for this Scheduler record that was successful, the entered Selection Begin Date and Time are used for selection purposes.

Modifying an existing scheduler record

You can modify a Scheduler record by modifying the information you entered on the Scheduler tab fields. However, you are not allowed to make any modifications for the profile code. If you need to change the profile code, delete the existing record and add a new one with the new profile code.

Deleting an existing scheduler record

Use the following steps to delete an existing Scheduler record.

1. Select the Scheduler record you want to delete.

2. Select Remove from the Record menu.

   You get the following message:

   Do you really want to delete this scheduler record? It is possible to inactivate this record instead of deleting it.

3. Click **Yes**.

   The selected record is deleted.

E-mail notification

The Scheduler provides automated e-mail notifications to the institutions to automatically communicate whether the scheduled jobs were run successfully or not. If there were any issues with the job running, the e-mail would prompt the appropriate personnel to look into and address the issue.

The institutions can identify as many as four different e-mail addresses to which this notification should be sent for each scheduler record. The use of these four fields is optional.

Certain format checks are performed when an e-mail address is entered. These include a warning message and automatic removal of spaces as well as an error if there is not at least one character prior to @ and before the . in the e-mail address.

A sample e-mail notification looks like the following:

To: *Email 1, 2, 3, 4*

From: *Banner Advancement Scheduler*

Subject: *Scheduler Request Initiated   STATUS: Completed   PROFILE: Banner Push*

Email text:

Request ID: 9999

Type: Push

Date Run: 2/24/2011

Status: Completed

Profile: Banner Push

Frequency: Daily

Error Info: only populated if error information was returned in the web service response

📓 **Note**

> If a Gift Push or Pull is completed, a Total Pledges count displays in the
> summary counts.   ∎

When a push or pull request is submitted, that request id first moves to INITIATED status. When the request is fully processed, the status will then change to reflect whether or not it was completed successfully. This is the point at which e-mail notifications are generated. Therefore, if for some reason a request does not move from the INTITIATED status, e-mail notifications will not be generated. Any of these requests should be investigated as this most likely means something is wrong with the Connector installation or configuration.

A Advancement Connector Data Mappings

Specific Banner® database fields are mapped to specific iModules Encompass database fields to ensure the integrity of both databases. This appendix provides details about the data mappings that are supported by baseline Banner Advancement and delivered on the Advancement Connector Data Mapping Form (AUACMAP).

The tables in this appendix are organized by the following tabs that are displayed in Encompass:

- Biographic information
- Preferred contact information
- Education information
- Other education information
- Spouse and family information
- Business information
- Business contact information
- Activities and honors information
- Admin only

The tables in this appendix provide the following details for each data mapping:

Table Heading	Description
Encompass Database Name	Name of the data element in the Encompass database
Friendly Name	Label used in the Encompass user interface to identify the data element
Type	Type of data field (drop-down list, text box, date box, e-mail text box confirm, or label)
Maximum Field Size	Maximum size of the data element
Pull	Flag that indicates whether the data element can be pulled from Encompass to Banner
Push	Flag that indicates whether the data element can be pushed from Banner to Encompass
Banner Database Name	Name of the data element in the Banner database
Selection Code Required	Flag that indicates whether a selection code must be entered on the Advancement Connector Profile Form (AUACDEF) when a push profile uses this data element

Biographic information

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPBPERS_NAME_PREFIX	Prefix	Text box	20		P	SPBPERS_NAME_PREFIX		
SPRIDEN_FIRST_NAME	First Name	Text box	60		P	SPRIDEN_FIRST_NAME		
SPRIDEN_MI	Middle Name	Text box	60		P	SPRIDEN_MI		
SPRIDEN_LAST_NAME	Last Name	Text box	60		P	SPRIDEN_LAST_NAME		
SPRIDEN_SURNAME_PREFIX	Last Name Prefix	Text box	60		P	SPRIDEN_SURNAME_PREFIX		
SPBPERS_NAME_SUFFIX	Suffix	Text box	20		P	SPBPERS_NAME_SUFFIX		
SPBPERS_SEX	Gender	Drop-down list	1		P	SPBPERS_SEX		
SPBPERS_BIRTH_DATE	Birth Date	Date box	8		P	SPBPERS_BIRTH_DATE		
APRSALU_SALU_CODE	Salutation Code (hidden)	Drop-down list	4		P	APRSALU_SALU_CODE	Required - Indicates which salutation code is pushed to Encompass	
APRSALU_SALUTATION	Salutation	Text box	120		P	APRSALU_SALUTATION		
SPBPERS_ETHN_CDE	Ethnicity	Drop-down list	8		P	SPBPERS_ETHN_CDE		
SPRIDEN_LAST_NAME_ORG	Organization Name	Text box	60		P	SPRIDEN_LAST_NAME		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRCATG_DONR_CODE	Primary Donor Code	Text box	4		P	APRCATG_DONR_CODE	Optional - Indicates which donor category(s) are pushed to Encompass. If blank, all constituents are included in the push. If one or more selection codes are entered (each separated by a comma with no spaces), only those constituents that match one of the entered selection codes are included in the push.	

Preferred contact information

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRADDR_STATUS_IND_PREF	Address Status (hidden)	Drop-down list	1	P	P	SPRADDR_STATUS_IND		
GOREMAL_EMAIL_ADDRESS_PREF	Primary Email	E-mail text box confirm	128	P	P	GOREMAL_EMAIL_ADDRESS		
GOREMAL_EMAL_CODE_PREF	Primary Email Code	Drop-down list	4	P	P	GOREMAL_EMAL_CODE		
SPRADDR_ATYP_CODE_PREF	Preferred Address Type	Drop-down list	2	P	P	SPRADDR_ATYP_CODE	Optional If blank, the following address fields are retrieved from the preferred address in Banner Advancement. If a selection code is entered, the following address fields are retrieved from the active address record that has this address type and is effective on the date of the push.	

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRADDR_STREET_LINE1_PREF	Preferred Address 1	Text Box	75	P	P	SPRADDR_STREET_LINE1		
SPRADDR_STREET_LINE2_PREF	Preferred Address 2	Text Box	75	P	P	SPRADDR_STREET_LINE2		
SPRADDR_STREET_LINE3_PREF	Preferred Address 3	Text Box	75	P	P	SPRADDR_STREET_LINE3		
SPRADDR_STREET_LINE4_PREF	Preferred Address 4	Text Box	75	P	P	SPRADDR_STREET_LINE4		
SPRADDR_HOUSE_NUMBER_PREF	House Number	Text Box	10	P	P	SPRADDR_HOUSE_NUMBER		
SPRADDR_CITY_PREF	City	Text Box	50	P	P	SPRADDR_CITY		
SPRADDR_STAT_CODE_PREF	State	Drop-down list	3	P	P	SPRADDR_STAT_CODE		
SPRADDR_ZIP_PREF	Zip	Text Box	30	P	P	SPRADDR_ZIP		
SPRADDR_NATN_CODE_PREF	Country	Drop-down list	5	P	P	SPRADDR_NATN_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRTELE_TELE_CODE	Preferred Phone Type	Drop-down list	4	P	P	SPRTELE_TELE_CODE	Optional If blank, the "primary" phone number is the phone number that is associated with the most current preferred address (defined on APACONS). The phone type on this phone record is used to transfer preferred phone numbers between Encompass and Banner. If the preferred address does not have a phone number, preferred phone numbers are not transferred between Encompass and Banner. If the selection code specifies a phone type, then that phone type is used to transfer preferred phone numbers between Banner and Encompass.	

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRTELE_ATYP_CODE_PREF	Preferred Phone Address Type (hidden)	Text Box	2	P	P	SPRTELE_ATYP_CODE		
SPRTELE_ADDR_SEQNO_PREF	Preferred Phone Address Sequence Number (hidden)	Text Box	2	P	P	SPRTELE_ADDR_SEQNO		
SPRTELE_CTRY_CODE_PHONE_PREF	Phone Country Code	Text Box	4	P	P	SPRTELE_CTRY_CODE_PHONE		
SPRTELE_PHONE_AREA_PREF	Phone Area Code	Text Box	6	P	P	SPRTELE_PHONE_AREA		
SPRTELE_PHONE_NUMBER_PREF	Phone Number	Text Box	12	P	P	SPRTELE_PHONE_NUMBER		
SPRTELE_PHONE_EXT_PREF	Phone Extension	Text Box	10	P	P	SPRTELE_PHONE_EXT		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRTELE_TELE_CODE_FAX_PREF	Fax Phone Type (hidden)	Drop-down list	4	P	P	SPRTELE_TELE_CODE	Required - Indicates which phone type represents the fax The following fax fields are retrieved from the active record that has this phone type and is effective on the date of the push.	
SPRTELE_ATYP_CODE_FAX_PREF	Fax Phone Address Type (hidden)	Text Box	2	P	P	SPRTELE_ATYP_CODE		
SPRTELE_ADDR_SEQNO_FAX_PREF	Fax Phone Address Sequence Number (hidden)	Text Box	2	P	P	SPRTELE_ADDR_SEQNO		
SPRTELE_CTRY_CODE_FAX_PREF	Fax Country Code	Text Box	4	P	P	SPRTELE_CTRY_CODE_PHONE		
SPRTELE_FAX_AREA_PREF	Fax Area Code	Text Box	6	P	P	SPRTELE_PHONE_AREA		
SPRTELE_FAX_NUMBER_PREF	Fax Number	Text Box	12	P	P	SPRTELE_PHONE_NUMBER		
SPRTELE_FAX_EXT_PREF	Fax Extension	Text Box	10	P	P	SPRTELE_PHONE_EXT		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRTELE_CTRY_CODE_PHONE_CELL	Cell Phone Country Code	Text Box	4	P	P	SPRTELE_CTRY_CODE_PHONE		
SPRTELE_PHONE_AREA_CELL	Cell Phone Area Code	Text Box	6	P	P	SPRTELE_PHONE_AREA		
SPRTELE_PHONE_NUMBER_CELL	Cell Phone Number	Text Box	12	P	P	SPRTELE_PHONE_NUMBER		

Education information

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APBCONS_COLL_CODE_PREF	Preferred School	Drop-down list	2		P	APBCONS_COLL_CODE_PREF		
APBCONS_PREF_CLAS	Preferred Class Year	Drop-down list	4		P	APBCONS_PREF_CLAS		
APRADEG_SEQ_NO_PRIM_1	Degree 1 sequence number (hidden)	Label	Integer (5)		P	APRADEG_SEQ_NO		
APRADEG_DEGC_CODE_PRIM_1	1st Degree	Label / Drop-down list	6		P	APRADEG_DEGC_CODE		Four most recent degrees are extracted, based on activity date.

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_ACYR_CODE_PRIM_1	1st Degree Year	Label / Drop-down list	4		P	APRADEG_ACYR_CODE		
APRADEG_SBGI_CODE_PRIM_1	1st Degree Institution Code	Drop-down list	6		P	APRADEG_SBGI_CODE		
APRADEG_COLL_CODE_PRIM_1	1st Degree School	Drop-down list	2		P	APRADEG_COLL_CODE		
APRADEG_CAMP_CODE_PRIM_1	1st Degree Campus	Drop-down list	3		P	APRADEG_CAMP_CODE		
APRAMAJ_MAJR_CODE_1_PRIM_1	1st Degree Major 1	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		Six most recent majors for the degree are extracted, based on activity date.
APRAMAJ_MAJR_CODE_2_PRIM_1	1st Degree Major 2	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_3_PRIM_1	1st Degree Major 3	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_4_PRIM_1	1st Degree Major 4	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_5_PRIM_1	1st Degree Major 5	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRAMAJ_MAJR_CODE_6_P RIM_1	1st Degree Major 6	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRADEG_MAJR_CODE_CON C_1_ PRIM_1	1st Degree Major Concentrat ion 1	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CON C_1		
APRADEG_MAJR_CODE_CON C_2_ PRIM_1	1st Degree Major Concentrat ion 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CON C_2		
APRADEG_MAJR_CODE_CON C_3_ PRIM_1	1st Degree Major Concentrat ion 3	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CON C_3		
APRADEG_MAJR_CODE_CON C_4_ PRIM_1	1st Degree Major Concentrat ion 4	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CON C_4		
APRADEG_MAJR_CODE_CON C_5_ PRIM_1	1st Degree Major Concentrat ion 5	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CON C_5		
APRADEG_MAJR_CODE_CON C_6_ PRIM_1	1st Degree Major Concentrat ion 6	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CON C_6		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_MINR_1_PRIM_1	1st Degree Minor	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_1		
APRADEG_MAJR_CODE_MINR_2_PRIM_1	1st Degree Minor 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_2		
APRADEG_SEQ_NO_PRIM_2	Degree 2 sequence number (hidden)	Label	Integer (5)		P	APRADEG_SEQ_NO		
APRADEG_DEGC_CODE_PRIM_2	2nd Degree	Label / Drop-down list	6		P	APRADEG_DEGC_CODE		Four most recent degrees are extracted, based on activity date.
APRADEG_ACYR_CODE_PRIM_2	2nd Degree Year	Label / Drop-down list	4		P	APRADEG_ACYR_CODE		
APRADEG_SBGI_CODE_PRIM_2	2nd Degree Institution Code	Drop-down list	6		P	APRADEG_SBGI_CODE		
APRADEG_COLL_CODE_PRIM_2	2nd Degree School	Drop-down list	2		P	APRADEG_COLL_CODE		
APRADEG_CAMP_CODE_PRIM_2	2nd Degree Campus	Drop-down list	3		P	APRADEG_CAMP_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRAMAJ_MAJR_CODE_1_PRIM_2	2nd Degree Major 1	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		Six most recent majors for the degree are extracted, based on activity date.
APRAMAJ_MAJR_CODE_2_PRIM_2	2nd Degree Major 2	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_3_PRIM_2	2nd Degree Major 3	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_4_PRIM_2	2nd Degree Major 4	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_5_PRIM_2	2nd Degree Major 5	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_6_PRIM_2	2nd Degree Major 6	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRADEG_MAJR_CODE_CONC_1_PRIM_2	2nd Degree Major Concentration 1	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_1		
APRADEG_MAJR_CODE_CONC_2_PRIM_2	2nd Degree Major Concentration 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_2		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_CONC_3_ PRIM_2	2nd Degree Major Concentration 3	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_3		
APRADEG_MAJR_CODE_CONC_4_ PRIM_2	2nd Degree Major Concentration 4	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_4		
APRADEG_MAJR_CODE_CONC_5_ PRIM_2	2nd Degree Major Concentration 5	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_5		
APRADEG_MAJR_CODE_CONC_6_ PRIM_2	2nd Degree Major Concentration 6	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_6		
APRADEG_MAJR_CODE_MINR_1_ PRIM_2	2nd Degree Minor	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_1		
APRADEG_MAJR_CODE_MINR_2_ PRIM_2	2nd Degree Minor 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_2		
APRADEG_SEQ_NO_PRIM_3	Degree 3 sequence number (hidden)	Label	Integer (5)		P	APRADEG_SEQ_NO		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_DEGC_CODE_PRIM_3	3rd Degree	Label / Drop-down list	6		P	APRADEG_DEGC_CODE		Four most recent degrees are extracted, based on activity date.
APRADEG_ACYR_CODE_PRIM_3	3rd Degree Year	Label / Drop-down list	4		P	APRADEG_ACYR_CODE		
APRADEG_SBGI_CODE_PRIM_3	3rd Degree Institution Code	Label / Drop-down list	6		P	APRADEG_SBGI_CODE		
APRADEG_COLL_CODE_PRIM_3	3rd Degree School	Drop-down list	2		P	APRADEG_COLL_CODE		
APRADEG_CAMP_CODE_PRIM_3	3rd Degree Campus	Drop-down list	3		P	APRADEG_CAMP_CODE		
APRAMAJ_MAJR_CODE_1_PRIM_3	3rd Degree Major 1	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		Six most recent majors for the degree are extracted, based on activity date.
APRAMAJ_MAJR_CODE_2_PRIM_3	3rd Degree Major 2	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_3_PRIM_3	3rd Degree Major 3	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_4_PRIM_3	3rd Degree Major 4	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
`APRAMAJ_MAJR_CODE_5_PRIM_3`	3rd Degree Major 5	Label / Drop-down list	4		P	`APRAMAJ_MAJR_CODE`		
`APRAMAJ_MAJR_CODE_6_PRIM_3`	3rd Degree Major 6	Label / Drop-down list	4		P	`APRAMAJ_MAJR_CODE`		
`APRADEG_MAJR_CODE_CONC_1_PRIM_3`	3rd Degree Major Concentration 1	Label / Drop-down list	4		P	`APRADEG_MAJR_CODE_CONC_1`		
`APRADEG_MAJR_CODE_CONC_2_PRIM_3`	3rd Degree Major Concentration 2	Label / Drop-down list	4		P	`APRADEG_MAJR_CODE_CONC_2`		
`APRADEG_MAJR_CODE_CONC_3_PRIM_3`	3rd Degree Major Concentration 3	Label / Drop-down list	4		P	`APRADEG_MAJR_CODE_CONC_3`		
`APRADEG_MAJR_CODE_CONC_4_PRIM_3`	3rd Degree Major Concentration 4	Label / Drop-down list	4		P	`APRADEG_MAJR_CODE_CONC_4`		
`APRADEG_MAJR_CODE_CONC_5_PRIM_3`	3rd Degree Major Concentration 5	Label / Drop-down list	4		P	`APRADEG_MAJR_CODE_CONC_5`		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_CONC_6_PRIM_3	3rd Degree Major Concentration 6	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_6		
APRADEG_MAJR_CODE_MINR_1_PRIM_3	3rd Degree Minor	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_1		
APRADEG_MAJR_CODE_MINR_2_PRIM_3	3rd Degree Minor 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_2		
APRADEG_SEQ_NO_PRIM_4	Degree 4 sequence number (hidden)	Label	Integer (5)		P	APRADEG_SEQ_NO		
APRADEG_DEGC_CODE_PRIM_4	4th Degree	Label / Drop-down list	6		P	APRADEG_DEGC_CODE		Four most recent degrees are extracted, based on activity date.
APRADEG_ACYR_CODE_PRIM_4	4th Degree Year	Label / Drop-down list	4		P	APRADEG_ACYR_CODE		
APRADEG_SBGI_CODE_PRIM_4	4th Degree Institution Code	Label / Drop-down list	6		P	APRADEG_SBGI_CODE		
APRADEG_COLL_CODE_PRIM_4	4th Degree School	Drop-down list	2		P	APRADEG_COLL_CODE		
APRADEG_CAMP_CODE_PRIM_4	4th Degree Campus	Drop-down list	3		P	APRADEG_CAMP_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRAMAJ_MAJR_CODE_1_PRIM_4	4th Degree Major 1	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		Six most recent majors for the degree are extracted, based on activity date.
APRAMAJ_MAJR_CODE_2_PRIM_4	4th Degree Major 2	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_3_PRIM_4	4th Degree Major 3	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_4_PRIM_4	4th Degree Major 4	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_5_PRIM_4	4th Degree Major 5	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_6_PRIM_4	4th Degree Major 6	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRADEG_MAJR_CODE_CONC_1_PRIM_4	4th Degree Major Concentration 1	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_1		
APRADEG_MAJR_CODE_CONC_2_PRIM_4	4th Degree Major Concentration 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_2		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_CONC_3_PRIM_4	4th Degree Major Concentration 3	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_3		
APRADEG_MAJR_CODE_CONC_4_PRIM_4	4th Degree Major Concentration 4	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_4		
APRADEG_MAJR_CODE_CONC_5_PRIM_4	4th Degree Major Concentration 5	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_5		
APRADEG_MAJR_CODE_CONC_6_PRIM_4	4th Degree Major Concentration 6	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_6		
APRADEG_MAJR_CODE_MINR_1_PRIM_4	4th Degree Minor	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_1		
APRADEG_MAJR_CODE_MINR_2_PRIM_4	4th Degree Minor 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_2		

Other education information

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_SEQ_NO_OTHER_1	Other Degree 1 sequence number (hidden)	Label	Integer (5)		P	APRADEG_SEQ_NO		
APRADEG_DEGC_CODE_OTHER_1	Other 1st Degree	Drop-down list	6		P	APRADEG_DEGC_CODE		Four most recent other degrees are extracted, based on activity date.
APRADEG_ACYR_CODE_OTHER_1	Other 1st Degree Year	Drop-down list	4		P	APRADEG_ACYR_CODE		
APRADEG_SBGI_CODE_OTHER_1	Other 1st Degree Institution Code	Drop-down list	6		P	APRADEG_SBGI_CODE		
APRADEG_COLL_CODE_OTHER_1	Other 1st Degree School	Drop-down list	2		P	APRADEG_COLL_CODE		
APRADEG_CAMP_CODE_OTHER_1	Other 1st Degree Campus	Drop-down list	3		P	APRADEG_CAMP_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRAMAJ_MAJR_CODE_1_ OTHER_1	Other 1st Degree Major 1	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		Six most recent majors for the other degree are extracted, based on activity date.
APRAMAJ_MAJR_CODE_2_ OTHER_1	Other 1st Degree Major 2	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_3_ OTHER_1	Other 1st Degree Major 3	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_4_ OTHER_1	Other 1st Degree Major 4	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_5_ OTHER_1	Other 1st Degree Major 5	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_6_ OTHER_1	Other 1st Degree Major 6	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRADEG_MAJR_CODE_CON C_1_ OTHER_1	Other 1st Degree Major Concentration 1	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CON C_1		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_CONC_2_OTHER_1	Other 1st Degree Major Concentration 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_2		
APRADEG_MAJR_CODE_CONC_3_OTHER_1	Other 1st Degree Major Concentration 3	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_3		
APRADEG_MAJR_CODE_CONC_4_OTHER_1	Other 1st Degree Major Concentration 4	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_4		
APRADEG_MAJR_CODE_CONC_5_OTHER_1	Other 1st Degree Major Concentration 5	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_5		
APRADEG_MAJR_CODE_CONC_6_OTHER_1	Other 1st Degree Major Concentration 6	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_6		
APRADEG_MAJR_CODE_MINR_1_OTHER_1	Other 1st Degree Minor	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_1		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_MINR_2_OTHER_1	Other 1st Degree Minor 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_2		
APRADEG_SEQ_NO_OTHER_2	Other Degree 2 sequence number (hidden)	Label	Integer (5)		P	APRADEG_SEQ_NO		
APRADEG_DEGC_CODE_OTHER_2	Other 2nd Degree	Drop-down list	6		P	APRADEG_DEGC_CODE		Four most recent other degrees are extracted, based on activity date.
APRADEG_ACYR_CODE_OTHER_2	Other 2nd Degree Year	Drop-down list	4		P	APRADEG_ACYR_CODE		
APRADEG_SBGI_CODE_OTHER_2	Other 2nd Degree Institution Code	Drop-down list	6		P	APRADEG_SBGI_CODE		
APRADEG_COLL_CODE_OTHER_2	Other 2nd Degree School	Drop-down list	2		P	APRADEG_COLL_CODE		
APRADEG_CAMP_CODE_OTHER_2	Other 2nd Degree Campus	Drop-down list	3		P	APRADEG_CAMP_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRAMAJ_MAJR_CODE_1_OTHER_2	Other 2nd Degree Major 1	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		Six most recent majors for the other degree are extracted, based on activity date.
APRAMAJ_MAJR_CODE_2_OTHER_2	Other 2nd Degree Major 2	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_3_OTHER_2	Other 2nd Degree Major 3	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_4_OTHER_2	Other 2nd Degree Major 4	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_5_OTHER_2	Other 2nd Degree Major 5	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_6_OTHER_2	Other 2nd Degree Major 6	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRADEG_MAJR_CODE_CONC_1_OTHER_2	Other 2nd Degree Major Concentration 1	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_1		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_CONC_2_OTHER_2	Other 2nd Degree Major Concentration 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_2		
APRADEG_MAJR_CODE_CONC_3_OTHER_2	Other 2nd Degree Major Concentration 3	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_3		
APRADEG_MAJR_CODE_CONC_4_OTHER_2	Other 2nd Degree Major Concentration 4	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_4		
APRADEG_MAJR_CODE_CONC_5_OTHER_2	Other 2nd Degree Major Concentration 5	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_5		
APRADEG_MAJR_CODE_CONC_6_OTHER_2	Other 2nd Degree Major Concentration 6	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_6		
APRADEG_MAJR_CODE_MINR_1_OTHER_2	Other 2nd Degree Minor	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_1		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_MINR_2_OTHER_2	Other 2nd Degree Minor 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_2		
APRADEG_SEQ_NO_OTHER_3	Other Degree 3 sequence number (hidden)	Label	Integer (5)		P	APRADEG_SEQ_NO		
APRADEG_DEGC_CODE_OTHER_3	Other 3rd Degree	Drop-down list	6		P	APRADEG_DEGC_CODE		Four most recent other degrees are extracted, based on activity date.
APRADEG_ACYR_CODE_OTHER_3	Other 3rd Degree Year	Drop-down list	4		P	APRADEG_ACYR_CODE		
APRADEG_SBGI_CODE_OTHER_3	Other 3rd Degree Institution Code	Drop-down list	6		P	APRADEG_SBGI_CODE		
APRADEG_COLL_CODE_OTHER_3	Other 3rd Degree School	Drop-down list	2		P	APRADEG_COLL_CODE		
APRADEG_CAMP_CODE_OTHER_3	Other 3rd Degree Campus	Drop-down list	3		P	APRADEG_CAMP_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRAMAJ_MAJR_CODE_1_OTHER_3	Other 3rd Degree Major 1	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		Six most recent majors for the other degree are extracted, based on activity date.
APRAMAJ_MAJR_CODE_2_OTHER_3	Other 3rd Degree Major 2	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_3_OTHER_3	Other 3rd Degree Major 3	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_4_OTHER_3	Other 3rd Degree Major 4	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_5_OTHER_3	Other 3rd Degree Major 5	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_6_OTHER_3	Other 3rd Degree Major 6	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRADEG_MAJR_CODE_CONC_1_OTHER_3	Other 3rd Degree Major Concentration 1	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_1		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_CONC_2_OTHER_3	Other 3rd Degree Major Concentration 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_2		
APRADEG_MAJR_CODE_CONC_3_OTHER_3	Other 3rd Degree Major Concentration 3	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_3		
APRADEG_MAJR_CODE_CONC_4_OTHER_3	Other 3rd Degree Major Concentration 4	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_4		
APRADEG_MAJR_CODE_CONC_5_OTHER_3	Other 3rd Degree Major Concentration 5	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_5		
APRADEG_MAJR_CODE_CONC_6_OTHER_3	Other 3rd Degree Major Concentration 6	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_6		
APRADEG_MAJR_CODE_MINR_1_OTHER_3	Other 3rd Degree Minor	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_1		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_MINR_2_OTHER_3	Other 3rd Degree Minor 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MINR_2		
APRADEG_SEQ_NO_OTHER_4	Other Degree 4 sequence number (hidden)	Label	Integer (5)		P	APRADEG_SEQ_NO		
APRADEG_DEGC_CODE_OTHER_4	Other 4th Degree	Drop-down list	6		P	APRADEG_DEGC_CODE		Four most recent other degrees are extracted, based on activity date.
APRADEG_ACYR_CODE_OTHER_4	Other 4th Degree Year	Drop-down list	4		P	APRADEG_ACYR_CODE		
APRADEG_SBGI_CODE_OTHER_4	Other 4th Degree Institution Code	Drop-down list	6		P	APRADEG_SBGI_CODE		
APRADEG_COLL_CODE_OTHER_4	Other 4th Degree School	Drop-down list	2		P	APRADEG_COLL_CODE		
APRADEG_CAMP_CODE_OTHER_4	Other 4th Degree Campus	Drop-down list	3		P	APRADEG_CAMP_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRAMAJ_MAJR_CODE_1_ OTHER_4	Other 4th Degree Major 1	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		Six most recent majors for the other degree are extracted, based on activity date.
APRAMAJ_MAJR_CODE_2_ OTHER_4	Other 4th Degree Major 2	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_3_ OTHER_4	Other 4th Degree Major 3	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_4_ OTHER_4	Other 4th Degree Major 4	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_5_ OTHER_4	Other 4th Degree Major 5	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRAMAJ_MAJR_CODE_6_ OTHER_4	Other 4th Degree Major 6	Label / Drop-down list	4		P	APRAMAJ_MAJR_CODE		
APRADEG_MAJR_CODE_CON C_1_ OTHER_4	Other 4th Degree Major Concentration 1	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CON C_1		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_CONC_2_OTHER_4	Other 4th Degree Major Concentration 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_2		
APRADEG_MAJR_CODE_CONC_3_OTHER_4	Other 4th Degree Major Concentration 3	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_3		
APRADEG_MAJR_CODE_CONC_4_OTHER_4	Other 4th Degree Major Concentration 4	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_4		
APRADEG_MAJR_CODE_CONC_5_OTHER_4	Other 4th Degree Major Concentration 5	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_5		
APRADEG_MAJR_CODE_CONC_6_OTHER_4	Other 4th Degree Major Concentration 6	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_CONC_6		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRADEG_MAJR_CODE_MIN R_1_ OTHER_4	Other 4th Degree Minor	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MIN R_1		
APRADEG_MAJR_CODE_MIN R_2_ OTHER_4	Other 4th Degree Minor 2	Label / Drop-down list	4		P	APRADEG_MAJR_CODE_MIN R_2		

Spouse and family information

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPBPERS_MRTL_CODE	Marital Status	Drop-down list	1		P	SPBPERS_MRTL_CODE		
APRSALU_SALU_CODE_JOI NT	Joint Salutation Code (hidden)	Label	4		P	APRSALU_SALU_CODE	Required - Indicates which joint salutation code is pushed to Encompass	
APRSALU_SALUTATION_JO INT	Joint Salutation	Text box	120		P	APRSALU_SALUTATION		
APRCSPS_MRTL_START_DA TE	Date of Marriage	Date box	8		P	APRCSPS_MRTL_START_DA TE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRIDEN_NTYP_CODE_MAIDEN	Maiden Name Type (hidden)	Drop-down list	4		P	SPRIDEN_NTYP_CODE	Required - Indicates which name type code is used to push maiden name information to Encompass	
SPRIDEN_FIRST_NAME_MAIDEN	Maiden First	Text box	60		P	SPRIDEN_FIRST_NAME		
SPRIDEN_MI_MAIDEN	Maiden Middle	Text box	60		P	SPRIDEN_MI		
SPRIDEN_LAST_NAME_MAIDEN	Maiden Last	Text box	60		P	SPRIDEN_LAST_NAME		
APRCSPS_FIRST_NAME	Spouse First	Text box	60		P	SPRIDEN_FIRST_NAME APRCSPS_FIRST_NAME		
APRCSPS_MI	Spouse Middle	Text box	60		P	SPRIDEN_MI APRCSPS_MI		
APRCSPS_LAST_NAME	Spouse Last	Text box	60		P	SPRIDEN_LAST_NAME APRCSPS_LAST_NAME		
APRCSPS_SURNAME_PREFIX	Spouse Surname Prefix	Text box	60		P	SPRIDEN_SURNAME_PREFIX APRCSPS_SURNAME_PREFIX		
APRCHLD_FIRST_NAME_1	1st Child First	Text box	60		P	SPRIDEN_FIRST_NAME APRCHLD_FIRST_NAME		
APRCHLD_MI_1	1st Child Middle	Text box	60		P	SPRIDEN_MI APRCHLD_MI		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRCHLD_LAST_NAME_1	1st Child Last	Text box	60		P	SPRIDEN_LAST_NAME APRCHLD_LAST_NAME		
APRCHLD_SURNAME_PREFIX_1	1st Child Surname Prefix	Text box	60		P	SPRIDEN_SURNAME_PREFIX APRCHLD_SURNAME_PREFIX		
APRCHLD_FIRST_NAME_2	2nd Child First	Text box	60		P	SPRIDEN_FIRST_NAME APRCHLD_FIRST_NAME		
APRCHLD_MI_2	2nd Child Middle	Text box	60		P	SPRIDEN_MI APRCHLD_MI		
APRCHLD_LAST_NAME_2	2nd Child Last	Text box	60		P	SPRIDEN_LAST_NAME APRCHLD_LAST_NAME		
APRCHLD_SURNAME_PREFIX_2	2nd Child Surname Prefix	Text box	60		P	SPRIDEN_SURNAME_PREFIX APRCHLD_SURNAME_PREFIX		
APRCHLD_FIRST_NAME_3	3rd Child First	Text box	60		P	SPRIDEN_FIRST_NAME APRCHLD_FIRST_NAME		
APRCHLD_MI_3	3rd Child Middle	Text box	60		P	SPRIDEN_MI APRCHLD_MI		
APRCHLD_LAST_NAME_3	3rd Child Last	Text box	60		P	SPRIDEN_LAST_NAME APRCHLD_LAST_NAME		
APRCHLD_SURNAME_PREFIX_3	3rd Child Surname Prefix	Text box	60		P	SPRIDEN_SURNAME_PREFIX APRCHLD_SURNAME_PREFIX		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRCHLD_FIRST_NAME_4	4th Child First	Text box	60		P	SPRIDEN_FIRST_NAME APRCHLD_FIRST_NAME		
APRCHLD_MI_4	4th Child Middle	Text box	60		P	SPRIDEN_MI APRCHLD_MI		
APRCHLD_LAST_NAME_4	4th Child Last	Text box	60		P	SPRIDEN_LAST_NAME APRCHLD_LAST_NAME		
APRCHLD_SURNAME_PREFIX_4	4th Child Surname Prefix	Text box	60		P	SPRIDEN_SURNAME_PREFIX APRCHLD_SURNAME_PREFIX		
APRCHLD_FIRST_NAME_5	5th Child First	Text box	60		P	SPRIDEN_FIRST_NAME APRCHLD_FIRST_NAME		
APRCHLD_MI_5	5th Child Middle	Text box	60		P	SPRIDEN_MI APRCHLD_MI		
APRCHLD_LAST_NAME_5	5th Child Last	Text box	60		P	SPRIDEN_LAST_NAME APRCHLD_LAST_NAME		
APRCHLD_SURNAME_PREFIX_5	5th Child Surname Prefix	Text box	60		P	SPRIDEN_SURNAME_PREFIX APRCHLD_SURNAME_PREFIX		

Business information

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APREHIS_EMPL_POSITION	Job Title	Text box	60	P	P	APREHIS_EMPL_POSITION		
APREHIS_EMPR_NAME	Employer	Text box	60	P	P	SPRIDEN_LAST_NAME APREHIS_EMPR_NAME		
APBCONS_DOTT_CODE	Occupation	Drop-down list	4	P	P	APBCONS_DOTT_CODE		
APREHIS_JOBC_CODE	Job Category	Drop-down list	3	P	P	APREHIS_JOBC_CODE		

Business contact information

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRADDR_STATUS_IND_BUS	Business Address Status (hidden)	Drop-down list	1	P	P	SPRADDR_STATUS_IND		
GOREMAL_EMAL_CODE_BUS	Business E-mail Code	Drop-down list	4	P	P	GOREMAL_EMAL_CODE	Required - Indicates which e-mail type is used to push business e-mail addresses to Encompass	

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
GOREMAL_EMAIL_ADDRESS _BUS	Business E-mail	Text box	128	P	P	GOREMAL_EMAIL_ADDRESS		
SPRADDR_ATYP_CODE_BUS	Business Address Type	Drop-down list	2	P	P	SPRADDR_ATYP_CODE	Optional If blank, the business address information associated with the current active primary employment record is used for the push to Encompass. If a selection code is entered, the current, active. address type is used for the push to Encompass.	
SPRADDR_STREET_LINE1_ BUS	Business Address 1	Text box	75	P	P	SPRADDR_STREET_LINE1		
SPRADDR_STREET_LINE2_ BUS	Business Address 2	Text box	75	P	P	SPRADDR_STREET_LINE2		
SPRADDR_STREET_LINE3_ BUS	Business Address 3	Text box	75	P	P	SPRADDR_STREET_LINE3		
SPRADDR_STREET_LINE4_ BUS	Business Address 4	Text box	75	P	P	SPRADDR_STREET_LINE4		
SPRADDR_HOUSE_NUMBER_ BUS	Business House Number	Text box	10	P	P	SPRADDR_HOUSE_NUMBER		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRADDR_CITY_BUS	Business City	Text box	50	P	P	SPRADDR_CITY		
SPRADDR_STAT_CODE_BUS	Business State	Drop-down list	3	P	P	SPRADDR_STAT_CODE		
SPRADDR_ZIP_BUS	Business Zip	Text box	30	P	P	SPRADDR_ZIP		
SPRADDR_NATN_CODE_BUS	Business Country	Drop-down list	5	P	P	SPRADDR_NATN_CODE		
SPRTELE_TELE_CODE_BUS	Business Phone Type	Drop-down list	4	P	P	SPRTELE_TELE_CODE	Optional If blank, the phone information is tied to the phone number associated with the business address, if there is one.	
SPRTELE_ATYP_CODE_BUS	Business Phone Address Type (hidden)	Text box	2	P	P	SPRTELE_ATYP_CODE		
SPRTELE_ADDR_SEQNO_BUS	Business Phone Address Sequence Number (hidden)	Text box	2	P	P	SPRTELE_ADDR_SEQNO		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRTELE_CTRY_CODE_PHONE_ BUS	Business Phone Country Code	Text box	4	P	P	SPRTELE_CTRY_CODE_PHONE		
SPRTELE_PHONE_AREA_BUS	Business Phone Area Code	Text box	6	P	P	SPRTELE_PHONE_AREA		
SPRTELE_PHONE_NUMBER_ BUS	Business Phone Number	Text box	12	P	P	SPRTELE_PHONE_NUMBER		
SPRTELE_PHONE_EXT_BUS	Business Phone Extension	Text box	10	P	P	SPRTELE_PHONE_EXT		
SPRTELE_TELE_CODE_FAX _BUS	Business Fax Phone Type (hidden)	Drop-down list	4	P	P	SPRTELE_TELE_CODE	Required - Indicates which phone type is used to push business fax information to Encompass	
SPRTELE_ATYP_CODE_FAX _BUS	Business Fax Phone Address Type (hidden)	Text box	2	P	P	SPRTELE_ATYP_CODE		
SPRTELE_ADDR_SEQNO_FA X_BUS	Business Fax Phone Address Sequence Number (hidden)	Text box	2	P	P	SPRTELE_ADDR_SEQNO		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRTELE_CTRY_CODE_FAX_BUS	Business Fax Country Code	Text box	4	P	P	SPRTELE_CTRY_CODE_PHONE		
SPRTELE_FAX_AREA_BUS	Business Fax Area Code	Text box	6	P	P	SPRTELE_PHONE_AREA		
SPRTELE_FAX_NUMBER_BUS	Business Fax Number	Text box	12	P	P	SPRTELE_PHONE_NUMBER		
SPRTELE_FAX_EXT_BUS	Business Fax Extension	Text box	10	P	P	SPRTELE_PHONE_EXT		

Activities and honors

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRIGRP_IGRP_CODE_1	Interests Code 1	Drop-down list	10		P	APRIGRP_IGRP_CODE		Six most recent interest codes are extracted, based on activity date.
APRIGRP_IGRP_CODE_2	Interests Code 2	Drop-down list	10		P	APRIGRP_IGRP_CODE		
APRIGRP_IGRP_CODE_3	Interests Code 3	Drop-down list	10		P	APRIGRP_IGRP_CODE		

Banner Advancement 8.6.1
Data Load/Extract Handbook
Advancement Connector Data Mappings

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRIGRP_IGRP_CODE_4	Interests Code 4	Drop-down list	10		P	APRIGRP_IGRP_CODE		
APRIGRP_IGRP_CODE_5	Interests Code 5	Drop-down list	10		P	APRIGRP_IGRP_CODE		
APRIGRP_IGRP_CODE_6	Interests Code 6	Drop-down list	10		P	APRIGRP_IGRP_CODE		
APRACTY_ACTC_CODE_1	Activity Code 1	Drop-down list	8		P	APRACTY_ACTC_CODE		Six most recent activity codes are extracted, based on activity date.
APRACLD_LEAD_CODE_1	Activity Participation Code 1	Drop-down list	5		P	APRACLD_LEAD_CODE		
APRACTY_ACTC_CODE_2	Activity Code 2	Drop-down list	8		P	APRACTY_ACTC_CODE		
APRACLD_LEAD_CODE_2	Activity Participation Code 2	Drop-down list	5		P	APRACLD_LEAD_CODE		
APRACTY_ACTC_CODE_3	Activity Code 3	Drop-down list	8		P	APRACTY_ACTC_CODE		
APRACLD_LEAD_CODE_3	Activity Participation Code 3	Drop-down list	5		P	APRACLD_LEAD_CODE		
APRACTY_ACTC_CODE_4	Activity Code 4	Drop-down list	8		P	APRACTY_ACTC_CODE		

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
APRACLD_LEAD_CODE_4	Activity Participation Code 4	Drop-down list	5		P	APRACLD_LEAD_CODE		
APRACTY_ACTC_CODE_5	Activity Code 5	Drop-down list	8		P	APRACTY_ACTC_CODE		
APRACLD_LEAD_CODE_5	Activity Participation Code 5	Drop-down list	5		P	APRACLD_LEAD_CODE		
APRACTY_ACTC_CODE_6	Activity Code 6	Drop-down list	8		P	APRACTY_ACTC_CODE		
APRACLD_LEAD_CODE_6	Activity Participation Code 6	Drop-down list	5		P	APRACLD_LEAD_CODE		

Admin only

The following data elements can be viewed by administrators only. These data elements are hidden for other users.

.

Encompass Database Name	Friendly Name	Type	Maximum Field Size	Pull	Push	Banner Database Name	Selection Code Required	Comments
SPRIDEN_PIDM	Constituent PIDM	Text box	8	P	P	SPRIDEN_PIDM		
SPRIDEN_ID	Banner ID	Text box	8		P	SPRIDEN_ID	Process checks SPRIDEN_ACTIVITY_DATE in active SPRIDEN record. If there are changes to the active SPRIDEN record, which fall within the time frame specified in the push, those changes are sent to Encompass. SPRIDEN_ID is not supported by the pull process.	Allows institutions to query data in Encompass, in lieu of the PIDM. If a constituent has multiple SPRIDEN record changes, only the changes to the active SPRIDEN record are pushed to Encompass.
SPBPERS_DEAD_IND	Deceased	Drop-down list	1		P	SPBPERS_DEAD_IND	Optional If blank, all living and deceased constituents are included in the push. If set to *N*, only living constituents are included. If set to *Y*, only deceased constituents are included.	