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Banner Advancement Self-Service User Guide

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Notices

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Application Overview

Banner® Advancement Self-Service provides the following features via the Web:

- Alumni and friends can communicate with your institution and with each other.
- Users can maintain and search for career advisor commitments.
- Users can review and maintain employment opportunity postings.
- Users can view giving history and make pledges and donations.
- Users can update contact information and view ways to volunteer to help your institution.
- Volunteer solicitors can add or view the results for each contact they make for fund raising.
- Advancement officers can define custom searches to access advancement individual, advancement organization, and prospect profile information.
- Advancement officers can access giving history and predefined demographic profiles.

This chapter discusses the following topics:

- [“Security” on page 8](#)
- [“Setup” on page 9](#)
- [“Main Menu” on page 23](#)
- [“Banner Advancement Self-Service Menus” on page 23](#)
- [“Online Help” on page 26](#)
- [“Interest Message” on page 26](#)
- [“Audit Trail of Updates” on page 27](#)
- [“Banner Web Tailor Baseline and Local Functionality” on page 28](#)

Security

Banner Advancement Self-Service provides access to secure user-specific information. To access this information, the user needs a valid Banner ID and Personal Identification Number (PIN). Both are maintained on the Third Party Access Form (GOATPAC). For added security, the user must re-enter the PIN for verification.

PINs are stored in encrypted form. Security is further enhanced by allowing your institution to enforce strong passwords that are long, complex, and nearly impossible to guess. Refer to the *Banner General User Guide* for information on using strong passwords.

A system-level time-out security feature indicates when Banner Advancement Self-Service is inactive. The user must log in again to regain access. For added security, the user can close the Web browser before leaving the computer, so that no one can access the information before the system times out.

Setup

After Banner Advancement Self-Service is installed, you need to configure the product according to your institution's specifications. You also need to ensure that Banner Advancement and Banner General are set up to support Banner Advancement Self-Service.

This section provides the following step-by-step setup procedures:

- [“Assign Advancement Data Tailor Role” on page 9](#)
- [“Modify Banner Advancement Self-Service Rules” on page 10](#)
- [“Assign Other Web Roles” on page 16](#)
- [“Change Delivered E-mail Address” on page 17](#)
- [“Set Web Indicators and Review Code Descriptions in Banner” on page 17](#)
- [“Update Crosswalk Validation Form \(GTVSDAX\)” on page 20](#)
- [“\(Optional\) Unmask Masked Fields” on page 22](#)

Assign Advancement Data Tailor Role

A Web role, assigned via Banner Web Tailor, exists in the TWTVROLE table. It must be assigned to at least one Web user to allow that user access to the Banner Advancement Self-Service rules (step 2).

1. Access the Secure Area and navigate to Web Tailor Administration.
2. From the Web Tailor menu (twbkwbis.P_GenMenu), select User Roles.
3. Enter the user ID of the person to whom you want to give the role.
4. Select the **Submit** button. The resulting Update User Roles page (twbkuroI.P_UpdateUserRoles) displays all available roles.
5. Select the check box for Advancement Data Tailor.
6. Select the **Submit Changes** button.

Advancement Data Tailor is separate from Web Tailor. The Advancement Data Tailor role should be given to anyone who should have access to the Banner Advancement Self-Service Rules page under the Web Tailor Administration menu. This role allows individuals to control Banner Advancement Self-Service processing without having access to all of Banner Web Tailor.

Modify Banner Advancement Self-Service Rules

You need to set up the rules that govern how Banner Advancement Self-Service works at your institution. These rules include default values that appear on various Web pages. These rules apply to your entire institution.

1. Access the Secure Area and navigate to Web Tailor Administration.
2. From the Web Tailor menu (twbkwbis.P_GenMenu), select Advancement Self-Service Rules.
3. On the Advancement Self-Service Rules page (bwakwrul.P_ModifyPgWebRules), set up General Rules, Pledge Rules, Gift Rules, Giving History Display Rules, Constituent Profile Rules, Constituent Search Page Rules, Moves Rules, and Event Rules.
4. When you are finished, select the **Save Changes** button.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
<i>The following fields are displayed in the General Rules section.</i>	
Contact Assignment Start Date	Date of the earliest contacts that are to be displayed. This value determines which contacts appear on all contact pages.
Contact Assignment End Date	Date when contacts should no longer be displayed. This value determines which contacts appear on all contact pages.
Default Comments User Code	Default user identification code to be inserted with general comments. When a user adds a general comment on the Let me tell you general information page (bwaknote.P_GeneralNote), this code appears in the Originator field when you look at the comment on the Advancement Individual/Organization Comments Form (APACOMT). Values come from the User Identification Control Form (GUAIDEN).
Default Comment Subject Type Code	Default subject code to be inserted with general comments. When a user adds a general comment on the Let me tell you general information page (bwaknote.P_GeneralNote), this code appears in the Subject Code field when you look at the comment on APACOMT (Subject Indexes block). Values come from the Subject Index Validation Form (GTVSUBJ).

Item	Description/source information
Default Advisor Activity Type	<p>Default activity type used to indicate users who are signed up to be career advisors.</p> <p>This rule is used to filter activity records based on the associated type. When a user signs up to be a career advisor, the career type values in the Select a Type of Advising pull-down list on the Sign me up to be a Career Advisor page (bwakadv.P_Make_Me_An_Advisor) reflect the associated career types.</p> <p>The only items in the pull-down list are the values from the Student Activity Code Validation Form (STVACTC) where the code in the Type field matches the codes specified in this rule.</p> <p>For example, if the default advisor activity type in the rule is Career Advisor (CADV), Banner Advancement Self-Service checks STVACTC to see which codes have CADV in the Type field. Those codes will be displayed in the Select a Type of Advising pull-down list.</p>
Default Fax Telephone Type	<p>Default type code used to identify fax numbers.</p> <p>Values come from the Telephone Type Validation Form (STVTELE).</p>
Require Job Posting Review	<p>If checked, a job posting is not available on the Web page until reviewed in Banner. Both the Display on the Web and Reviewed by check boxes must be selected on the Job Posting Form (AOAJPST).</p> <p>If cleared, any open job postings on AOAJPST where the Display on the Web check box is selected is displayed, whether they have been reviewed or not.</p>
Display Deceased Constituents on Classmate Search Results	<p>If checked, deceased classmates are displayed on the Classmate Search Results page.</p> <p>If cleared, deceased classmates are not displayed.</p>
<i>The following fields are displayed in the Pledge Rules section.</i>	
Default Cross Reference Code	<p>Default cross reference (for example, parent, spouse, employee) for the user entering the pledge in the Voluntary Support module. This is not currently used.</p>
Default Solicitation Code	<p>Default solicitation code used on the Review External Pledge Form (AGAWPLG).</p> <p>When a user submits a pledge and you view it on AGAWPLG, Banner automatically populates the Solicitation Type field on the Solicitations and Results window with the code specified in this rule.</p> <p>Values come from the Solicitation Type Code Validation Form (ATVSOLC).</p>

Item	Description/source information
Default Pledge Vehicle Code	<p>Default pledge vehicle code used on AGAWPLG.</p> <p>When a user submits a pledge and you view it on AGAWPLG, Banner automatically populates the Vehicle field with the code specified in this rule.</p> <p>Values come from the Pledge/Gift Vehicle Code Validation Form (ATVPGVE).</p>
Default Pledge Status Code	<p>Default pledge status code used on AGAWPLG.</p> <p>When a user submits a pledge and you view it on AGAWPLG, Banner automatically populates the Status field with the code specified in this rule.</p> <p>Values come from the Pledge Status Code Validation Form (ATVPSTA).</p>
Default Pledge Reminder Code	<p>Default pledge reminder code used on AGAWPLG.</p> <p>When a user submits a pledge and you view it on AGAWPLG, Banner automatically populates the Reminder field with the code specified in this rule.</p> <p>Values come from the Pledge Reminder Code Validation Form (ATVPGVE).</p>
Default Installment Reminder Code	<p>Default installment reminder code used on AGAWPLG when a pledge with installments is saved.</p> <p>When a user submits a pledge and you view it on AGAWPLG, Banner automatically populates the Reminder field in the Installments section with the code specified in this rule.</p> <p>Values come from the Pledge Reminder Code Validation Form (ATVPGVE).</p>
<i>The following fields are displayed in the Gift Rules section.</i>	
Default Gift Vehicle Code	<p>Default gift vehicle code that appears on the Gift Form (AGAGIFT) or on the Review External Gifts Form (AGAWGIF) for gifts donated by users who did not log in via the secured side of Banner Advancement Self-Service.</p> <p>When a user submits a gift and you view it on AGAGIFT (or AGAWGIF if the user did not use the secure login), Banner automatically populates the Vehicle field with the code specified in this rule.</p> <p>Values come from the Pledge/Gift Vehicle Code Validation Form (ATVPGVE).</p>

Item	Description/source information
Default Gift Class Code	<p>Default gift class code that appears on AGAGIFT, or on AGAWGIF for gifts donated by users who did not log in via the secured side of Banner Advancement Self-Service.</p> <p>When a user submits a gift and you view it on AGAGIFT (or AGAWGIF if the user did not use the secure login), Banner automatically populates the Class 1 field with the code specified in this rule.</p> <p>Values come from the Gift Classification Code Validation Form (ATVGCLS).</p>
Default Gift Solicitation Code	<p>Default gift solicitation code that appears on AGAGIFT, or on AGAWGIF for gifts donated by users who did not log in via the secured side of Banner Advancement Self-Service.</p> <p>When a user submits a gift and you view it on AGAGIFT (or AGAWGIF if the user did not use the secure login), Banner automatically populates the Solicitation field in the Solicitation Information block with the code specified in this rule.</p> <p>Values come from the Solicitation Type Code Validation Form (ATVSOLC).</p>
Default New User Gift Notification User ID	<p>ID of the person who reviews unsecured gifts (made by donors who do not have PIDMs) and loads the gifts into the Banner database. Users with PIDMs and users without PIDMs can both make gifts:</p> <ul style="list-style-type: none"> • A user with a PIDM can access the Banner Self-Service Secure Area to make a gift. The AGBGIFT table is automatically updated when the gift is created. • A user without a PIDM cannot access the Secure Area. The gift is stored in the Web No PIDM Gift holding tables (AGBGHLD and AGRGHDE) until the user is given a PIDM. When the user is given a PIDM, the person's gifts are moved from the temporary tables to AGBGIFT. <p>If an unsecured gift is made, the person specified in this rule will receive a Banner message on the General menu (GUAGMNU). He or she will give the donor a PIDM, review the gift on AGAWGIF, and select OK to Load to load the gift into AGBGIFT.</p> <p>Values for the rule come from the Enterprise Access Controls Form (GOAEACC).</p>
Allow Pledge Payment Option	<p>If checked, donors can pay toward an existing pledge.</p> <p>If cleared, donors can only make a one-time gift.</p>
Allow Gift Split Option	<p>If checked, donors can split a gift with a spouse, or another existing cross-reference if no spouse record exists.</p> <p>If cleared, donors cannot split a gift with anyone.</p>

Item	Description/source information
Display Employer Match Information	<p>If checked, matching gift detail for the current employer is displayed on the Credit Card Payment page (bwakgift.P_Pledge_Payment).</p> <p>If cleared, the matching gift detail is not displayed.</p>
Allow Web to Satisfy Pledges	<p>If checked, paying a pledge in full updates the pledge status to "paid."</p> <p>If cleared, you must manually change the pledge status in Banner Advancement when the pledge is fully paid.</p>
Allow Online Receipt	<p>If checked, the donor can view or print an on-line receipt on the Online Receipt page (bwakgift.P_Donation_Receipt for secured gifts and bwakngft.P_Donation_Receipt for unsecured gifts).</p> <p>If cleared, the donor must arrange for a receipt through the institution.</p>
Allow Online Matching Gift Processing	<p>If checked, matching gift processing occurs when the gift is created, automatically checking to see if the gift is eligible to be matched.</p> <p>If cleared, you must run the Matching Gift Allocations Report (AGPMATG) in Banner Advancement to see if a gift is eligible to be matched.</p>
<i>The following fields are displayed in the Giving History Display Rules section.</i>	
Allow Gift Display Option	<p>If checked, All Existing Gifts appears as a filter option for the Giving History Area pull-down list on the Giving History page (bwdkghis.P_View_Gifts).</p> <p>If cleared, the option does not appear.</p>
Allow Pledge Display Option	<p>If checked, All Existing Pledges appears as a filter option for the Giving History Area pull-down list on the Giving History page (bwdkghis.P_View_Gifts).</p> <p>If cleared, the option does not appear.</p>
Allow Gift and Pledge Display Option	<p>If checked, All Existing Gifts and Pledges appears as a filter option for the Giving History Area pull-down list on the Giving History page (bwdkghis.P_View_Gifts).</p> <p>If cleared, the option does not appear.</p>
Allow Fiscal Year Display Option	<p>If checked, Totals by Fiscal Year appears as a filter option for the Giving History Area pull-down list on the Giving History page (bwdkghis.P_View_Gifts).</p> <p>If cleared, the option does not appear.</p>

Item	Description/source information
Allow Campaign Display Option	<p>If checked, Totals by Campaign and Fiscal Year appear as a filter option for the Giving History Area pull-down list on the Giving History page (bwdkghis.P_View_Gifts).</p> <p>If cleared, the option does not appear.</p>
Allow Designation Display Option	<p>If checked, Totals by Designation and Fiscal Year appear as a filter option for the Giving History Area pull-down list on the Giving History page (bwdkghis.P_View_Gifts).</p> <p>If cleared, the option does not appear.</p>
Allow Combined Display Option	<p>If checked, Combined Giving appears as an option for the Giving History Area pull-down list on the Giving History page (bwdkghis.P_View_Gifts). Combined giving includes giving by cross references.</p> <p>If cleared, the option does not appear.</p>
Allow Overall Display Option	<p>If checked, Overall Giving appears as an option for the Giving History Area pull-down list on the Giving History page (bwdkghis.P_View_Gifts).</p> <p>If cleared, the option does not appear.</p>
<i>The following field is displayed in the Constituent Profile Rules section.</i>	
Display both general and prospect contacts in the Contacts section	<p>If checked, both general and prospect contact records are included when a user searches for contacts.</p> <p>If cleared, only general contact records are included.:</p>
<i>The following fields are displayed in the Constituent Search Page Rules section.</i>	
Title to display in Institution search selection to query selected home institution codes	<p>Name of the home institution that appears in the Degree Institution pull-down list on the Custom Search page (bwdksrch.P_Search_Select). Refer to "Home Institution" on page 21 for more details.</p>
Include spouse gift transaction records with donor giving in credit range query searches	<p>If checked, searches for which credit ranges are entered include giving records for both the donor and spouse. The following field names appear for the credit fields on the Custom Search page:</p> <ul style="list-style-type: none"> • Donor and Spouse Hard Credit • Donor and Spouse Soft Credit • Donor and Spouse Overall Credit. <p>If cleared, only the donor's records are included. The following field names appear for the credit fields on the Custom Search page:</p> <ul style="list-style-type: none"> • Donor Hard Credit • Donor Soft Credit • Donor Overall Credit

Item	Description/source information
<i>The following field is displayed in the Moves Rules section.</i>	
Allow Deletion of Existing Moves records	If checked, Web users with the role of Moves Manager can delete moves records via the Web. If cleared, moves records can only be deleted in Banner Advancement.
<i>The following fields are displayed in the Event Rules section.</i>	
Event System(s)	Type of event(s) whose attendance information you want to be displayed on the Web to advancement officers. Use the Shift key or Ctrl key to select multiple types of events.
Year Definition	Type of year: Calendar or Fiscal.
Limit Past Event Attendance	Number of years whose attendance information you want to be displayed on the Web to advancement officers. Select No Limit to include all years.

Updates to Banner

This page does not update information in the Banner database.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Web Tailor Administration menu	bmenu.P_WebTailorMnu

Assign Other Web Roles

Banner Advancement Self-Service is delivered with three Web roles that can be assigned to Web users:

- Advancement Data Tailor: These users can access the Advancement Self-Service Rules page on the Web Tailor menu but are restricted from other Banner Web Tailor functions.
- Advancement Moves Manager: These users can update moves information via the Web. Web users with this role can access the Add a Move and Update a Move pages.
- Advancement Officer: These users can access the Advancement Officers section of Banner Advancement Self-Service.

In [“Assign Advancement Data Tailor Role” on page 9](#), you assigned the Advancement Data Tailor role to a Web user so that person could update the Banner Advancement Self-Service rules. Now you can assign any additional Web roles to Web users as necessary using the Update User Roles page (twbkuroi.P_UpdateUserRoles) in Web Tailor Administration.

Change Delivered E-mail Address

Banner Advancement Self-Service is delivered with the Ellucian e-mail address as a bottom link on several Web pages. You need to change this generic e-mail address to your institution’s e-mail address.

Use the following table to identify the package.procedures that must be changed.

Web Page	Package.Procedure
Static html	develop.htm
Bottom links (modify using Banner Web Tailor -- Reorder or Customize Menu Items option)	
Add a mailing to your list	bwakmail.P_Add_To_Mail_list
Let me tell you about my children	bwaknote.P_ChildrenNote
Let me tell you about my job	bwaknote.P_JobNote
Let me tell you about a new degree	bwaknote.P_DegreeNote
Let me tell you general information	bwaknote.P_GeneralNote
Let me update you on my marital status	bwaknote.P_MaritalNote
Search Result	bwaksrch.P_SearchResults
Information Text (modify using Banner Web Tailor -- Reorder or Customize Information Text option)	
Find a Classmate	bwaksrch.P_Class.Search

Set Web Indicators and Review Code Descriptions in Banner

Several Banner forms are used to define the codes that are used on Web pages. For some forms, *all* defined codes are included on the appropriate Web pages. For example, all gift society codes defined on the Gift Society Validation Form (ATVDCNP) are included on the appropriate Web pages. In other cases, you can choose which codes will be included on Web pages. On the Donor Category Code Validation Form (ATVDONR), for example, you can identify the specific donor categories that will be included on Web pages.

For the forms listed in the following table, set the Web indicators and review code descriptions as follows:

- If the form has a Web Indicator check box, select or clear the check box appropriately:
 - Selected: Display the code description on Web pages.
 - Cleared: Exclude the code description from Web pages.
- For all forms in the following table, review the descriptions of the codes that will be included on Web pages. The descriptions, not the codes, are actually displayed, so make sure the descriptions are clear and accurate.

Form	Web Indicator?
ATVAMST Membership Status Code Validation	No
ATVDCNP Gift Society Validation	No
ATVDCST Gift Society Type Validation	No
ATVDONR Donor Category Code Validation	Yes
ATVDOWP Advancement Officer Web Profile Items Validation	No
ATVDOTT DOTT Code Validation	No
ATVEMPS Employment Status Validation	Yes
ATVEXRS External Ratings Code Validation	No
ATVEXCL Exclusion Code Validation	No
ATVFISC Fiscal Year Validation	No
ATVFREQ Frequency Code Validation	Yes
ATVFUND Funding Areas Validation	No
ATVGCLS Gift Classification Code Validation	No
ATVGIFT Gift/Payment Type Validation	Yes
ATVGIVH Giving Vehicle Code Validation	No
ATVGIVL Giving Level Code Validation	No
ATVIGRP Interest Group Code Validation	Yes
ATVINCM Income Code Validation	No
ATVJOBC Job Category Code Validation	Yes
ATVMDIS Matching Gift Distribution Frequency Validation	No
ATVMOVE Move Type Code Validation	No
ATVOCON Advancement Organization Contact Type Validation	No
ATVPDUR Duration Code Validation	Yes

Form		Web Indicator?
ATVPGVE	Pledge/Gift Vehicle Code Validation	No
ATVPLDG	Pledge Type Validation	Yes
ATVPRMD	Pledge Reminder Code Validation	No
ATVPROJ	Project/Interest Code Validation	No
ATVPROP	Proposal Code Validation	No
ATVPRCD	Special Purpose Code Validation	No
ATVPRST	Prospect Status Validation	No
ATVPRTP	Special Purpose Type Validation	No
ATVPSTA	Pledge Status Code Validation	No
ATVRATE	Prospect Rating Code Validation	No
ATVREFR	Reference Code Validation	No
ATVRSCR	Ratings Screen Code Validation	No
ATVRTGT	Ratings Type Validation	No
ATVSALU	Salutation Type Validation	No
ATVSCNT	Solicitor Contact Code Validation	Yes
ATVSCRS	Solicitor Contact Result Code Validation	Yes
ATVSICC	Standard Industrial Code Validation	Yes
ATVSOLC	Solicitation Type Code Validation	No
ATVSORC	Source Code Validation	No
ATVSTFT	Staff Assignment Type Validation	No
ATVUSRC	User Defined Code Validation	No
ATVVIPC	Variable Purpose Validation	No
ATVXREF	Cross Reference Code Validation	No
AUAIGRP	Institution Interest Group	Yes
GTVDIRO	Directory Item Validation	No
GTVMAIL	Mail Code Validation	Yes
GTVEXPN	Expense Code Validation	No
GTVEMAIL	E-mail Address Type Validation	Yes
GTVNTYP	Name Type Validation	No
GTVSUBJ	Subject Index Validation	No

Form		Web Indicator?
GUASRVY	Survey Definitions	Yes
STVACCG	Activity Category Validation	No
STVACTC	Student Activity Code Validation	No
STVACTP	Activity Type Validation	No
STVATYP	Address Type Code Validation	No
STVCNTY	County Code Validation	No
STVCOLL	College Code Validation	No
STVDEGC	Degree Code Validation	Yes
STVETHN	Ethnic Code Validation	No
STVGEOD	Geographic Region Division Code Validation	No
STVGEOR	Geographic Region Code Validation	No
STVHONR	Institutional Honors Code Validation	No
STVLGCY	Legacy Code Validation	No
STVMAJR	Major, Minor, Concentration Code Validation	No
STVNATN	Nation Code Validation	No
STVRELG	Religion Code Validation	No
STVSBGI	Source/Background Institution Code Validation	No
STVTELE	Telephone Type Validation	No

Update Crosswalk Validation Form (GTVSDAX)

You need to add the following records on GTVSDAX.

Campaigns and Designations

You must add records to GTVSDAX to specify the campaigns and designations that you want displayed first. The bwakcpmt package looks for internal code DSPALUDES and internal group PAYMENTVENDOR to see if any default campaigns and designations have been defined. If so, they are displayed first, based on the hierarchy defined on GTVSDAX.

The external code is a 15-character code that consists of the campaign and designation. It is processed in two parts: The first five characters are for the campaign, and the last ten characters represent the designation. The designation *must* begin with the sixth character. If the campaign is less than five characters, enter spaces for the remainder of the five characters.

Example

Campaign ABC and designation 12345 would be entered as ABC 12345.

Enter the appropriate sequence numbers for each record on GTVSDAX. The hierarchy depends on the sequence numbers. If you add a record without a sequence number, that record is assigned sequence number 99 for displaying in the pull-down list. The basic setup for each record is as follows:

Field	Description/Value
Internal Code	DSPALUDES
Sequence	Number that specifies the hierarchy in which you want the items to appear.
Internal Group	PAYMENTVENDOR
External Code	Value of the campaign and designation. The first five characters represent the campaign and the last ten characters specify the designation.
Description	Default designation number
Translation Code	blank
Reporting Date	blank
System Required	cleared

Home Institution

Advancement officers can search for all advancement individuals and advancement organizations that have a specific institution code (in addition to the other search options). A “home institution” can be defined to include multiple institution codes. To do this, you must add a record to GTVSDAX for each institution you want to include in the “home institution.”

Example

Suppose your institution has four satellite campuses, each with its own STVSBGI code. On GTVSDAX, enter a rule for each campus’s STVSBGI code. When the advancement officer executes a search and selects “Home Institution” (or whatever title has been designated on the Advancement Self-Service Rules page), the search will return any record where the institution code matches any of the four codes entered on GTVSDAX. This simplifies searching for associated institutions.

The `bwdksrch` package looks for internal code `SBGICODE` and internal group `ADVSEARCH` to see if any home institution codes have been defined.

The basic setup for each record is as follows:

Field	Description/Value
Internal Code	SBGICODE
Sequence	NA
Internal Group	ADVSEARCH
External Code	Institution code from STVSBGI
Description	Advancement Search Institution code
Translation Code	blank
Reporting Date	blank
System Required	cleared

The record can be repeated multiple times for different institution codes.

Once the group is defined in GTVSDAX, the title defined in the Search Page Rules section of the Advancement Self-Service Rules page is displayed after All Institutions at the top of the pull-down list for the Degree Institutions field of the Individual or Organization Search page (bwdksrch.P_Search_Select).



Note: Banner Advancement Self-Service is delivered with one record entry on GTVSDAX where the external code is UPDATE ME. This entry is ignored by the search process. The title entered on the Advancement Self-Service Rules page is displayed as a search option *only* if there is at least one GTVSDAX rule where the external code is not UPDATE ME.

ZIP Code/Postal Code

You must add a GTVSDAX record to specify which nation codes require a ZIP/postal code when a credit card is used to make a payment.

(Optional) Unmask Masked Fields

The following data can be displayed or hidden on Web pages:

- Last name prefix
- House number
- Street line 4
- Telephone country code

Because many users do not need these fields, Banner Advancement Self-Service is delivered with these fields masked. This means the fields are hidden from display. If you

want to display these fields on your Web pages, use the Data Display Mask Rules Form (GORDMSK) to unmask the fields. The object code used for Banner Advancement Self-Service masking rules is **SSB_MASKING. You can unmask fields for specific packages. Refer to the *Banner General Data Security Handbook* for more details.

Main Menu

A user can access the main menu as follows:

1. Select the Enter Secure Area link on the home page.
2. Enter a user ID.

The ID must be a valid Banner ID.

3. Enter a personal identification number (PIN).

The PIN must be the PIN maintained for the person on the Third Party Access Form (GOATPAC). The format of the PIN depends on the preference set by your institution.

4. Select the **Login** button.

If the ID and PIN are valid and the user is eligible to access the self-service functions, the system displays the main menu.

If the user logs in to the system and has not previously provided PIN hint questions and responses, he or she is asked to supply them. These values are used to verify the person's identity and allow the person to log in to the self-service products if he or she forgets the current PIN. Institutional preferences determine whether the user or institution generates the security questions.

The security questions and answers can be changed at any time. The Change Security Question page appears on the Personal Information menu. This page can also be accessed directly from the Change PIN page.

A user who forgets his/her PIN can select the Forgot PIN button on the login page. The Security Answer page then provides the user's hint questions. Once the questions are answered correctly, the user can enter a new PIN.

Banner Advancement Self-Service Menus

Banner Advancement Self-Service uses a menu hierarchy for dynamic navigation through the system. Hypertext links and buttons provide click-on navigation through the Banner Advancement Self-Service Web pages.

Each Web page has Menu and Exit buttons:

- Menu takes the user to the previous page, the main menu, or to a menu of options for a particular function, depending on which page or menu the person is currently using.
- Exit opens the User Logout page. The user can navigate to the institution's home page or close the Web browser before leaving.

Banner Advancement Self-Service has the following menus:

- [“Alumni and Friends Menu” on page 24](#)
- [“Advancement Officers Menu” on page 25](#)

Alumni and Friends Menu

The Alumni and Friends menu provides access to non-secure, online functions that allow your institution to build and maintain relationships with alumni and friends. These functions are grouped into the following menus:

- [“Communications” on page 24](#)
- [“Career Opportunities” on page 25](#)
- [“Voluntary Support” on page 25](#)

Communications

Your institution can communicate back and forth with alumni and friends. In addition, they can communicate with each other. The Communications menu includes options to perform the following functions:

- Review or update an interest profile
- Find a classmate
- Submit a note about life events (children, marriage, etc.)
- Respond to a survey
- Sign up for mailings
- Update addressees, telephone numbers, and e-mail addresses
- Select a preferred address
- Select information to be included in the class member directory

Career Opportunities

Your institution can help alumni and friends explore career opportunities. The Career Opportunities menu includes options to perform the following functions:

- Sign up to be a career advisor
- Review current career advisor commitments
- Search for a career advisor
- Search for employment opportunities
- Post employment opportunities

Voluntary Support

Alumni and friends can make online pledges and donations and view giving history. The Voluntary Support menu includes options to perform the following functions:

- View giving history
- Make a pledge
- Make a donation

Advancement Officers Menu

The Advancement Officers menu provides access to advancement individual and advancement organization information via the Web. This allows advancement officers to access, view, and update information while they are traveling. The Advancement Officers menu includes options to perform the following functions:

- Update profile preferences
- Manage moves
- View contacts
- Add contacts
- Search for people or organizations

Volunteer Menu

The Voluntary Support option gives advancement individuals and advancement organizations the ability to view giving history and make pledges and donations via the Web. They can perform the following functions:

- Make a donation to one campaign/designation combination at a time, using a credit card over the Web

- Split gifts with their spouses
- Display an employer's matching gift information while making the gift
- Create anticipated matching gift records
- View giving history
- Submit pledges via the Web

Online Help



Note: This section is applicable only when you use Banner Advancement Self-Service as a standalone product. When used with a portal, users access the portal's help.

Banner Advancement Self-Service comes with one HTML help file (scthelp.htm). Selecting the Help icon on a Banner Advancement Self-Service page displays this help page.

This help file is used by all Banner self-service products. Ellucian recommends that your institution customize this page to reflect the procedures and information specific to your institution. Some suggested ideas are:

- Contact information (for example, phone numbers and e-mail addresses) for key personnel in each department (Admissions, Registrar, Payroll, Advancement)
- Frequently asked questions
- Registration procedures
- Financial Aid procedures

Providing such information might answer many questions and reduce the calls to your help desk and administrative offices.

Interest Message

When there is new information about interests, the following message appears at the end of every Banner Advancement Self-Service menu: *View areas of interest that have changed since your last visit.*

A list of interests (bwakigrp.P_View_UpdInterests) is displayed with links that take the user to the corresponding Web page. Once a user accesses this Web page, the message disappears until the next time new information is issued.

Audit Trail of Updates

Users can use the Web pages to communicate with your institution. Alumni might update information about their addresses, pledges, job postings, children, new degrees, and other general comments. You can review this information using the following Banner General and Banner Advancement forms.

Form	Description
Address Review and Verification Form (GOAADDR)	In the key block, either the Not Reviewed or Reviewed check box may be checked (query-only) to indicate whether addresses were reviewed. If the Reviewed check box is checked in the SPRADDR block, then the address information was reviewed. The By field displays the name of the user who reviewed the address.
Review External Pledges Form (AGAWPLG)	You can use this form to review pledges entered or received from an outside source (such as the Web), a telemarketing firm, or telemarketing software. This information can be entered via the Voluntary Support Add a Pledge page.
Job Posting Form (AOAJPST)	<p>The Reviewed by check box indicates whether the job posting information was reviewed. The name of the reviewer appears in the adjacent field. The name of the last person to add or update the information is also displayed. This information can be displayed via the Career Opportunities Add or Change a Posting page.</p> <p>The Display on the Web check box must be selected for a posting to appear on the Web.</p> <p>You can require job postings to be reviewed before they appear on the Web by checking the Require Job Posting Review check box on the Banner Web Tailor Advancement Self-Service Rules page.</p>
Advancement Individual/ Organization Comments Form (APACOMT)	When the Reviewed check box is checked, the comments were reviewed. The name of the reviewer is displayed in the adjacent field. This information is entered in the Class Notes Let me tell you general information page.

Banner Web Tailor Baseline and Local Functionality

There are two types of Banner self-service menus, roles, menu items, and info text:

- *Baseline* records are shipped by Ellucian and should not be changed in any way.
- *Local* records can be created and changed by your institution. They are never overwritten by Ellucian. This lets you customize info text and menus without losing anything during upgrades, and still allows Ellucian to ship new items.

When the system attempts to display an item, it first looks for a local record and, if found, uses that record. If a local record is not found, it displays the baseline record.

To accomplish this, the TWGBWMNU, TWGRWMRL, TWGRMENU, and TWGRINFO tables include a source indicator field. Baseline rows contain a B, and Local rows contain an L.

For more information, refer to the *Banner Web Tailor User Guide*.

Communications

The Communications option allows alumni and friends to communicate with your institution and with each other. Communication features include the following:

- Your institution and the users can define specific information to appear in the directory.
- User addresses and phone numbers can be updated on request. The user can indicate if this is the “preferred” address.
- Users can update their address via the Web. These changes are reported to the institution through a process that allows someone at your institution to review the addresses and make sure that they meet data entry requirements.
- Users can create an interest profile by choosing from a list of interests defined by the institution. The institution can then keep the users informed about those areas of interest.
- Users can respond to surveys and update their information. Questions are mapped to locations in the appropriate database to be updated.
- Users can send a class note to the institution. The information is in free-form text. Indicators in the database control what is published in class notes, and when it was included.
- Users can communicate suggestions to the institution regarding the Web site.
- Users can add themselves to or remove themselves from mailing lists. Users can indicate which address to use for mail. The institution identifies mailings that can be added or removed.
- Users can search for classmates.

This chapter discusses the following topics:

- [“Setup” on page 30](#)
- [“Menu Options” on page 30](#)
- [“Related Forms” on page 31](#)
- [“Web Pages” on page 34](#)

Setup

Before implementing the Communications function of Banner® Advancement Self-Service, ensure that the following are properly set up:

- Web Tailor Customize Web Rules page (twbkwrul.P_ModifyPgWebRules)
- Web Tailor Advancement Self-Service Rules page (bwakwrul.P_ModifyPgWebRules)
- Mail Code Validation Form (GTVMAIL)
- E-mail addresses on the Advancement Identification Form (APAIDEN)
- Interest Group Code Validation Form (ATVIGRP)
- Institution Interest Group Form (AUAIGRP)
- Advancement Individual Interest Group Form (APAIGRP)

Menu Options

The Communications menu (bmenu.P_ComMnu) includes the following options with associated links.

Menu Option	Links
Interests	View Your Interest Profile Update Your Interest Profile View Your Interests
Find a Classmate	
Class Notes	Let me tell you about my children Let me tell you about my job Let me tell you about a new degree Let me tell you general information Let me update you on my marital status
Respond to a Survey	
Mailing Lists	View Mailing Lists Update Mailing Lists
Update Addresses and Phones	
Update E-Mail Addresses	
Select a Preferred Address	
Show Directory Profile	

Related Forms

When the Communications option is implemented, the following forms are either used to control the display of information via the Web or control information that may be updated by the user via the Web.

Interest Group Code Validation Form (ATVIGRP)

Use this form to enter interest codes and descriptions. A field indicator allows the user or institution to determine whether or not to display this information on the Web. This form allows the institution to define new interest groups that users can sign up for via the Web. Each group includes a six-character code, a 30- to 60-character short description, and up to a 2000-character long description.

Institution Interest Group Form (AUAIGRP)

Use this form to define what interests are presented, enter details for the interest, and select whether or not to display this information on the Web. Valid codes are selected from ATVIGRP. Information entered on this form is displayed for those advancement individuals and advancement organizations who have the interest in their profile. This form allows your institution to define new information for an interest group. It contains an interest code, date range of when the code is active, activity date, URL for the Web page to go to, and a free-form text field that has details of the interest. From the Web, users can view active events in their interests or other interest events entered by the institution and selected by the users. Banner uses the last access date that a user logged in and compares it to the last update of the items in the user's interest profile. A menu item allows access to the new information about the interest, and new information about interests in the user's interest profile is displayed.

Advancement Individual Interest Group Form (APAIGRP)

Use this form to view and change the interests of an advancement individual or advancement organization. If the **Display on Web** check box is selected, the interest will appear on the Web for that individual or organization. The related interest codes and descriptions are selected from a list of values on the Interest Group Code Validation Form (ATVIGRP).

Advancement Identification Form (APAIDEN)

Use this form to enter individuals and organizations into Banner. Use the E-mail tab to store an unlimited number of e-mail addresses for IDs. Field indicators are used to determine whether e-mail information and/or the URL are displayed on the Web. E-mail and URL information are displayed only if the Web pages can be updated.

The Telephone window can store an unlimited number of telephone numbers for IDs.

Advancement Individual Information Form (APACONS)

Use this form to add and maintain an advancement individual's information.

Employment History Form (APAEHIS)

Use this form to maintain an advancement individual's employment information.

Directory Options Rules Form (GOADIRO)

Use this form to set default options for display in the directory.

E-mail Address Type Validation Form (GTVEMAL)

Use this form to identify URL address types. The **Web** check box determines if the e-mail address type is displayed on the Web.

E-mail Address Form (GOAEMAL)

Use this form to identify URL addresses. The **Web** check box determines if the e-mail address is displayed on the Web.

Advancement Individual/Organization Comments Form (APACOMT)

This Advancement form includes the following functions:

- **Displayed in Notes** check box for display on the Web
- **Notes Date** check box
- **OK for Notes** check box for display on the Web

User Identification Control Form (GUAIDEN)

Use this form to enter user IDs, names, and Banner IDs.

Survey Definition Form (GUASRVY)

Use this form to define surveys for display on the Web. This form defines the question and valid responses (up to five). The survey is definable by a group code so that you can maintain multiple surveys. The survey code allows you to assign roles, for example, Employee, Faculty, Student, Alumni, to identify the population that should access the

survey. The survey code may be mapped to a population selection that determines who can access the survey. If no population selection is defined for the survey, everyone in the role can access it. Each survey code has a date range for how long it is to be available on the Web.

Survey Response Query Form (GOISRVY)

Use this form to display the results of the survey by respondent.

Survey Summary Query Form (GUISRVS)

Use this form to display summary results of the survey.

Mail Code Validation Form (GTVMAIL)

Use this form to determine whether the mail code is to appear on the Web by indicating Yes or No. Users can add or remove mail codes based on those that are allowed to appear on the Web.

Advancement Mail Form (APAMAIL)

Use this form to define user IDs for mailings and salutations, as applied to mailing lists selected for the Web.

Web User Directory Profile Form (GOADPRF)

Use this form to view the profile of a Web use, update the profile, and reset the profile. The institution may override their defaults and manually set up or remove a directory profile.

Address Role Privileges Form (GOAADRL)

Use this form to assign address types from a list of values to roles in a drop-down menu. The privilege code and activity date are displayed.

Web Pages

This section provides details about the following Web pages:

Interests

- [“View Interest Profile Header \(bwakigrp.P_View_Profile\)” on page 35](#)
- [“Update Interest Profile \(bwakigrp.P_Update_Profile\)” on page 36](#)
- [“Add an Interest Group to Your Profile \(bwakigrp.P_Add_To_Profile\)” on page 37](#)
- [“Remove an Interest Group From Your Profile \(bwakigrp.P_Remove_From_Profile\)” on page 39](#)
- [“View Interests \(bwakigrp.P_View_Interests\)” on page 40](#)
- [“Interests That Changed Since Your Last Visit \(bwakigrp.P_View_UpdInterests\)” on page 41](#)

Find a Classmate

- [“Find a Classmate \(bwaksrch.P_ClassSearch\)” on page 42](#)
- [“Classmate Search Results \(bwaksrch.P_SearchResults\)” on page 43](#)

Class Notes

- [“Let Me Tell You About My Children \(bwaknote.P_ChildrenNote\)” on page 44](#)
- [“Let Me Tell You About My Job \(bwaknote.P_JobNote\)” on page 45](#)
- [“Let Me Tell You About a New Degree \(bwaknote.P_DegreeNote\)” on page 46](#)
- [“Let Me Tell You General Information \(bwaknote.P_GeneralNote\)” on page 47](#)
- [“Let Me Update You on My Marital Status \(bwaknote.P_MaritalNote\)” on page 49](#)

Respond to a Survey

- [“Answer a Survey \(bwgksrvy.P_ShowSurveys\)” on page 50](#)
- [“Survey Questions \(bwgksrvy.P_ShowQuestions\)” on page 50](#)

Mailing Lists

- [“Mailing Lists \(bwakmail.P_View_Mail_List\)” on page 51](#)
- [“Add a Mailing to Your List \(bwakmail.P_Add_To_Mail_List\)” on page 52](#)
- [“Remove a Mailing from Your List \(bwakmail.P_Remove_From_Mail_List\)” on page 53](#)

- [“Change an Address or Effective Date for a Mailing \(bwakmail.P_SelChange_Mail_List\)” on page 54](#)
- [“Change an Address or Effective Date \(bwakmail.P_Change_Mail_List\)” on page 55](#)

Update Addresses and Phones

- [“Update Address and Phones-Select Type \(bwgkogad.P_SelectAtypUpdate\)” on page 56](#)
- [“Update Addresses and Phones-Update/Insert \(bwgkogad.P_DisppAddrUpdate\)” on page 56](#)

Update E-mail Addresses

- [“Update E-mail Addresses-Select Address \(bwgkogad.P_SelectEmailUpdate\)” on page 57](#)
- [“Update E-mail Addresses-Update/Insert \(bwgkogad.P_DisppEmailUpdate\)” on page 57](#)

Select a Preferred Address

- [“Select a Preferred Address \(bwakpref.P_Pref_Address\)” on page 57](#)

Show Directory Profile

- [“Directory Profile \(bwgkoprf.P_ShowDiroltems\)” on page 58](#)

View Interest Profile Header (bwakigrp.P_View_Profile)

The View Interest Profile page displays the advancement individual’s current interest groups and their descriptions. The links to add to your profile and remove from your profile provides the ability to update the interest list.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Interest Group Code Validation Form (ATVIGRP)	The Code , Description , Display on Web , and Activity Date fields are used for setup.

Web page fields

This page contains the following fields.

Item	Description/source information
Interest Groups	The interest profile is maintained on the Advancement Individual Interest Group Form (APAIGRP).

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add to your profile	Goes to the Add an Interest Group to Your Profile page (bwakigrp.P_Add_To_Profile)
Remove from your profile	Goes to the Remove an Interest Group from Your Profile page (bwakigrp.P_Remove_From_Profile)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Interests menu	bmenu.P_InterestMnu

Update Interest Profile (bwakigrp.P_Update_Profile)

The Update Interest Profile page displays the links to add an interest group to your profile or to remove an interest group from your profile.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add an Interest Group to Your Profile	Goes to the Add an Interest Group to Your Profile page (bwakigrp.P_Add_To_Profile)
Remove an Interest Group from Your Profile	Goes to the Remove an Interest Group From Your Profile page (bwakigrp.P_Remove_From_Profile)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Interests menu	bmenu.P_InterestMnu

Add an Interest Group to Your Profile (bwakigrp.P_Add_To_Profile)

The Add an Interest Group to Your Profile page is used to add an interest. Only one interest can be added at a time, but you can repeat the process as often as needed to add all the desired interests to a profile.

This page has a pull-down list to add interests. When an interest is selected from the list, it is added to the profile when the **Add Interest Group to Profile** button is selected. The results of this update may be viewed on APAIGRP.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Interest Group Code Validation Form (ATVIGRP)	Select the Display on Web check box for each interest group code that you want to be available on the Web.
Interest Group Detail Form (AUAIGRP)	Select the Display on Web check box for each interest group code that you want to be available on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
New Interest Group	Interest groups from which to choose.

Updates to Banner

This page updates Banner as follows.

Item	Description
Add Interest Group to Profile	Advancement Individual Interest Group Form (APAIGRP)

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Add Interest Group to Profile	Adds the interest group to the user profile and goes to the Interest menu (bmenu.P_InterestMnu)

Remove an Interest Group From Your Profile (bwakigrp.P_Remove_From_Profile)

The Remove an Interest Group from Your Profile page is used to remove an interest group. Only one interest can be removed at a time, but you can repeat the process as often as needed to remove all the desired interests from a profile.

This page has a pull-down list to remove interest groups. When an interest group is selected from the list, it is removed from the profile when the **Remove from Profile** button is selected. When an interest is removed from an interest profile, it no longer exists on APAIGRP for that individual.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Existing Interest Group	Interest groups from which to choose.

Updates to Banner

This page updates Banner as follows.

Item	Description
Delete Interest Group from Profile	Advancement Individual Interest Group Form (APAIGRP)

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Delete Interest Group from Profile	Removes the interest group from the user profile and goes to the Interest menu (bmenu.P_InterestMnu)

View Interests (bwakigrp.P_View_Interests)

The View Interests page displays all the information that exists on the interest groups in your profile. The Link to Interest Web page is an active Web link to the site listed. The information displayed is defined on AUAIGRP.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Interest Group Detail Form (AUAIGRP)	Enter the URL in the URL field for each interest group for which you want a hyperlink to appear on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
Interests	List of interest groups associated with the user profile. A hyperlink is provided if defined on AUAIGRP.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add to your profile	Goes to the Add an Interest Group to Your Profile page (bwakigrp.P_Add_To_Profile)
Remove from your profile	Goes to the Remove an Interest Group from Your Profile page (bwakigrp.P_Remove_From_Profile)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Interests menu	bmenu.P_InterestMnu

Interests That Changed Since Your Last Visit (bwakigrp.P_View_UpdInterests)

The Interests that changed since your last visit page displays the information that exists on the interest groups in your profile that have changed since the last time the detail was viewed. The Link to Interest Web page is an active Web link to the site listed. The information displayed is defined on AUAIGRP.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Interests	Interest groups that have been changed since your last visit.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add to your profile	Goes to the Add an Interest Group to Your Profile page (bwakigrp.P_Add_To_Profile)
Remove from your profile	Goes to the Remove an Interest Group from Your Profile page (bwakigrp.P_Remove_From_Profile)

Find a Classmate (bwaksrch.P_ClassSearch)

The Find a Classmate page is used to search for classmate information. Only the information that the institution has set up or that the classmate approves for display on the Web can be viewed.

The Class Year fields allows users to search for classmate information by a class year range. The College pull-down list allows users to search for classmate information for an individual college.

If the **Sounds Like Name Search** indicator is selected, records that resemble or sound like the query values entered display. If it isn't selected, only records that match the query values entered display. Alternate name details are also considered in the search for possible matches.

Searches can be expanded by using the wildcard (%) to display all possible matches based on the selection criteria. The number of records retrieved appears at the bottom of the page.

After a successful search, search results are displayed.

This page also allows a user to e-mail the Advancement Office for help in finding a classmate.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Web User Directory Profile Form (GOADPRF)	Select the Display in Directory check box for the person to be displayed.
Directory Options Rule Form (GOADIRO)	Select the Display in Profile, Update in Profile, Default to Directory check boxes, as applicable, for each item you want to be displayed on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
Search criteria	Fields in which to enter the known values on which to search.

Updates to Banner

This page does not update information in the Banner database.

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Go Find It!	Goes to the Classmate Search Results page (bwaksrch.P_Search_Results)

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Advancement Office E-mail Link	Launches the user's e-mail program.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Communications menu	bmenu.P_ComMnu

Classmate Search Results (bwaksrch.P_SearchResults)

The Classmate Search Results page displays the results of the Find a Classmate search. Only the information that the institution has set up or that the classmate approves for display on the Web can be viewed. If your institution chooses to include deceased persons in the search results, an indicator is displayed next to these records.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Banner Web Tailor Advancement Self-Service Rules	Select the Display Deceased check box if you want records for deceased persons to be included in search results.

Web page fields

This page contains the following fields.

Item	Description/source information
First name, middle initial, last name, class year, college	Advancement Identification Form (APAIDEN). Advancement Individual Information Form (APACONS), Preferred block.
E-mail	Advancement Identification Form (APAIDEN).

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Item	Description
New Search	Goes to the Find a Classmate page (bwaksrch.P_ClassSearch)
Advancement Office E-mail Link	Launches the user's e-mail program.

Let Me Tell You About My Children (bwaknote.P_ChildrenNote)

The Let me tell you about my children page provides an e-mail link that can be defined to default the address desired when selected. The user can then enter the details they wish to share about their children.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Item	Description
Advancement Office E-mail Link	Launches the user's e-mail program.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Class Notes menu	bmenu.P_ClassNoteMnu

Let Me Tell You About My Job (bwaknote.P_JobNote)

The Let me tell you about my job page provides an e-mail link that can be defined to default the address desired when selected. The user can then enter the details they wish to share about their job.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Item	Description
Advancement Office E-mail Link	Launches the user's e-mail program.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Class Notes menu	bmenu.P_ClassNoteMnu

Let Me Tell You About a New Degree (bwaknote.P_DegreeNote)

The Let me tell you about a new degree page provides an e-mail link that can be defined to default the address desired when selected. The user can then enter the details they wish to share about a new degree.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Item	Description
Advancement Office E-mail Link	Launches the user's e-mail program.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Class Notes menu	bmenu.P_ClassNoteMnu

Let Me Tell You General Information (bwaknote.P_GeneralNote)

The Let me tell you general information page provides the ability to enter a general comment and submit the information. The details entered can then be viewed in Banner.

Before using this page, the institution must set up defaults on the Banner Web Tailor Advancement Self-Service Rules page. You must identify a default comments user. This default user becomes the originator of the comment. You must also define a default subject type code for general comment entries.

The results of general comments entered via the Web can be viewed on the Advancement Individual/Organization Comments Form (APACOMT).

When **OK for Notes** is selected on APACOMT, the comments can be published in Class Notes. When **Displayed in Notes** is checked, the comment displayed in notes and the date field show when it appeared (for the institution to update). When **Reviewed** is selected, the comments were reviewed.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Banner Web Tailor Advancement Self-Service Rules page	Select the desired values in the Default Comments User Code and Default Comment Subject Type Code fields.

Web page fields

This page contains the following fields.

Item	Description/source information
Comments	Enter desired text and specify whether the information may be published.

Updates to Banner

This page updates Banner as follows.

Item	Description
Send Info	Web Changes Information Form (APIWCHG), Comment field Advancement Individual/Organization Comments Form (APACOMT), OK for Notes field

Links to other Web pages

This page contains the following links to other Web pages.

Item	Description
Advancement Office E-mail Link	Launches the user's e-mail program.

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Send Info	Submits the data to Banner and redisplay the page.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Class Notes menu	bmenu.P_ClassNoteMnu

Let Me Update You on My Marital Status (bwaknote.P_MaritalNote)

The Let me update you on my marital status page provides an e-mail link that can be defined to default the address desired when selected. The user can then enter the details they wish to share about their marital status.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Item	Description
Advancement Office E-mail Link	Launches the user's e-mail program.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Class Notes menu	bmenu.P_ClassNoteMnu

Answer a Survey (bwgksrvy.P_ShowSurveys)

The Answer a Survey page allows users to select and participate in surveys. For form information and Web pages or menus linked to this page, refer to the *Banner Web General User Guide*.

Survey Questions (bwgksrvy.P_ShowQuestions)

The Survey Questions page allows users to complete surveys. Info Text on each survey page gives instructions for completing the survey. The responses for the survey are stored in distinct tables. Population selection may be used to identify a target audience for survey response.

This page allows a user to send an e-mail to the Advancement Office.

Users can select not to respond to the survey by selecting the **Remove Survey from List** button. This button applies to the entire survey, not to the individual question. This button removes the survey selection from the user's list of surveys.

Select the **Survey Complete** button to submit the survey results to the institution's database. The survey selection is deleted from the user's list of surveys.

A survey remains as an option until one of the following occurs:

- The user completes the survey (**Survey Complete**).
- The user requests the survey to be removed (**Remove Survey from List**).
- The date allowing the survey to appear on the Web expires.

The institution defines how the questions appear on the survey, as follows:

- Type of question
 - More Than One Response Allowed (check boxes)
 - Only One Response Allowed (radio group)
 - Comments Only
 - Additional Comments Allowed
- Order of the questions
- Valid responses

For form information and Web pages or menus linked to this page, refer to the *Banner Web General User Guide*.

Mailing Lists (bwakmail.P_View_Mail_List)

The Mailing Lists page displays all current subscriptions for the user including the selected address type and the effective date for each mailing.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Current Mailing Lists	Information about the mailing lists to which the user subscribes.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a mailing to your list	Goes to the Add a Mailing to Your List page (bwakmail.P_Add_To_Mail_List)
Remove a mailing from your list	Goes to the Remove a Mailing from Your List page (bwakmail.P_Remove_From_Mail_List)
Change a mailing address or effective date	Goes to the Change an Address or Effective Date for a Mailing page (bwakmail.P_SelChange_Mail_List)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Mailing Lists menu	bmenu.P_MailListMnu

Add a Mailing to Your List (bwakmail.P_Add_To_Mail_List)

The Add a Mailing to Your List page displays drop-down lists to select a mailing to be added and the address where the mailing should be sent. You can enter the beginning date for the mailing. For each selection made, select the **Add to Mailing List** button.

This page allows a user to send an e-mail to the Advancement Office.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Mailing to add	Name of the mailing to which the user wants to subscribe.
Address for the mailing	Type of address (such as Permanent or Business) to which the mailing is to be sent.
Date for the mailing to begin	First date of the subscription.

Updates to Banner

This page updates Banner as follows.

Item	Description
Mailing	Stores the data on the Advancement Mail Form (APAMAIL).

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Add a Mailing to the List	Adds the mailing and goes to the Mailing Lists page (bwakmail.P_View_Mail_List).

Remove a Mailing from Your List (bwakmail.P_Remove_From_Mail_List)

The Remove a Mailing from Your List page displays a drop-down list that identifies the user's mailings. When a user selects a mailing from the list and selects **Delete Mailing from List**, the item is removed.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Mailing to remove	Subscription to be removed.

Updates to Banner

This page updates Banner as follows.

Item	Description
Mailing	Stores the data on the Advancement Mail Form (APAMAIL).

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Delete Mailing from List	Adds the mailing and goes to the Mailing Lists page (bwakmail.P_View_Mail_List).

Change an Address or Effective Date for a Mailing (bwakmail.P_SelChange_Mail_List)

This page displays a drop-down list that identifies the user's mailings. This list is used to select a mailing that needs an address and/or effective date change.

Use the following steps to change an address or effective date for a mailing.

1. Navigate to the **Alumni and Friends** menu.
2. Select the **Communications** link.
3. Select the **Mailing Lists** link.
4. Select the **Update Mailing Lists** link.
5. Select the **Change an Address or Effective Date for a Mailing** link.
6. Select a mailing from the **Mailing to change** drop-down list.
7. Select the **Change Address or Effective Date** button.

The Change an Address or Effective Date page is displayed.

8. Change the address and/or effective date.
9. Select the **Update** button.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Mailing to change	Subscription to be changed.

Updates to Banner

This page does not update information in the Banner database.

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Change address or effective date	Goes to the Change an address or effective date page (bwakmail.P_Change_Mail_List).

Change an Address or Effective Date (bwakmail.P_Change_Mail_List)

The Change an Address or Effective Date page is used to change the address and/or effective date for a selected mailing. This page contains a drop-down list of the user's addresses.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Change mailing entry	Name of the mailing to which the user wants to subscribe.
New address for the mailing	Type of address (such as Permanent or Business) to which the mailing is to be sent.
New date for the mailing to begin	First date of the subscription.

Updates to Banner

This page updates Banner as follows.

Item	Description
Mailing	Stores the data on the Advancement Mail Form (APAMAIL).

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Update	Changes the mailing and goes to the Mailing Lists page (bwakmail.P_View_Mail_List).

Update Address and Phones-Select Type (bwgkogad.P_SelectAtypUpdate)

This page displays current addresses and phone numbers.

- To update an address, select the Current link for the address that needs to be updated.
- To update a phone number, select the Primary link for the phone number that needs to be updated.
- To insert an address, select the address type from the **Type of Address to Insert** drop-down list and select the **Submit** button.

These actions display the Update Addresses and Phones-Update/Insert page where the actual update or insert is made.

Update Addresses and Phones-Update/Insert (bwgkogad.P_DispAddrUpdate)

This page is used to update or insert address and phone numbers for a user. Required fields are **Valid From This Date**, **Address Line 1**, **City**, **State** or **Province**, and **ZIP** or **Postal Code**.

Update E-mail Addresses-Select Address (bwgkogad.P_SelectEmailUpdate)

This page displays current e-mail addresses.

- To update an e-mail address, select the link for the address that needs to be updated.
- To insert an e-mail address, select the e-mail type from the **Type of E-mail to Insert** drop-down list and select the **Submit** button.

These actions display the Update E-mail Addresses-Update/Insert page where the actual update or insert is made.

Update E-mail Addresses-Update/Insert (bwgkogad.P_DispatchEmailUpdate)

This page is used to update or insert e-mail address for a user. **E-mail** is the only required field.

Select a Preferred Address (bwakpref.P_Pref_Address)

The Select a Preferred Address page enables users to determine which address type is preferred. This page displays address types that the user's role is permitted to access and update. The current preferred address is listed first. Changes made on this page are saved to the APBCONS table and can be viewed via the Advancement Individual Information Form (APACONS).

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Preferred	Radio group that indicates the current preferred address and allows the user to select a different preferred address. The preferred address setting is maintained on the Advancement Individual Information Form (APACONS).
Address Type	Address type description. this field originates from the STVATYP table for the SPRADDR_ATYP_CODE.

Item	Description/source information
Address Detail	Address details from the SPRADDR table. Addresses are maintained on the Advancement Identification Form (APAIDEN).

Updates to Banner

This page updates Banner as follows.

Item	Description
Preferred	Advancement Individual Information Form (APACONS), Preferred Address

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Communications menu	bmenu.P_ComMnu

Directory Profile (bwgkoprf.P_ShowDiroltems)

The Directory Profile page allows the user to include or exclude selected information in the directory for display on the Web. The institution uses the Directory Options Rule Form (GOADIRO) to define default profile information to be displayed on the Web. Individual users can select information to display from the following list:

- Name
- Permanent address and phone
- Campus address and phone
- Business address and phone
- Home address and phone
- Fax number
- Employee department
- Expected graduation year
- College affiliation
- Job title

- E-mail address
- Maiden name
- Class year
- Preferred college

For form information and Web pages or menus linked to this page, refer to the *Banner Web General User Guide*.

Career Opportunities

The Career Opportunities option provides the ability to maintain and search for career advisor commitments. This option also provides the ability to review and maintain employment opportunity postings.

This chapter discusses the following topics:

- [“Career Advisor Activity” on page 60](#)
- [“Employment Opportunity Activity” on page 61](#)
- [“Setup” on page 62](#)
- [“Menu Options” on page 62](#)
- [“Related Form” on page 63](#)
- [“Web Pages” on page 63](#)

Career Advisor Activity

The institution can define an activity type code that indicates activities representing different career volunteer options (for example, provide internship or career advising). The institution can also define an e-mail address for the user to contact regarding career advising.

Users can obtain a list of career advisor or networking contacts. They can search the advisor list using the following criteria:

- Specific class year
- Graduate degree
- Major
- Type of advisor
- Occupation
- Industry category
- City or state of primary employer

The search result is an online report that shows the following advisor information:

- Name
- Class year
- Occupation

- Primary employer
- Primary employer address
- Primary employer phone number
- E-mail address of alumni who are interested and meet the criteria

If alumni indicate a desire to be a career advisor, they choose the activity code that represents the appropriate role they desire. The year code can be the current year or any year for the next 10 years. A user can sign up to be an advisor, even without an employment record. However, if the SIC, city, or state is entered as search criteria and either no employment record exists or no primary employer was identified, the advisor will not be returned. An advisor can add or update the occupation code while signing up.

Advisor information is stored in the following tables:

- Advisor's preferred class on APBCONS
- Existing degree for the advisor on APRADEG
- Existing major for the advisor on APRADEG
- Occupational code associated with the advisor on APBCONS
- SIC code associated with the advisor's primary employer on APREHIS or AOBORGN
- City associated with the employment address type and sequence number (APREHIS_ATYP_CODE and SEQ_NO) of the advisor's primary employer
- State associated with the employment address type and sequence number (APREHIS_ATYP_CODE and SEQ_NO) of the advisor's primary employer

Employment Opportunity Activity

The Web provides users with career information from employers who offer job opportunities. This includes matching gift companies or any organization on the system. It also includes users who offer internships to students, as a way of updating information about the internships. When looking up information, users can search by SIC, city and state of the company, and the job category of the position available.

Users can view or update the following information about the opportunity from the company:

- Title of the position
- Company name and address (physical and Web)
- Contact person (name, title, phone number, fax number, and e-mail address)
- Description of the position (free-format text)
- Location of the position

- Job category (for example, executive, professional, part-time)
- Job requirements (free-format text)

Job opportunities for companies are stored in a table. The information includes:

- Indicating an address from the Job Posting Repeating Table (AORJPST)
- Contact name from AORJPST
- Contact's e-mail address
- Web URL of the company
- Telephone number and extension
- Fax number (a phone type that is defined as a fax type)

Users can search for job opportunities via a search engine, or view all opportunities where the Accepting Applications Until date has not passed. Users can e-mail the address or access the Web URL. The search engine searches via the SIC of the company, city and state of the company, and job category.

The Banner® Web Tailor Advancement Self-Service Rules page allows the institution to select whether they require job posting review (audit).

Setup

Before implementing the Career Opportunities function of Banner Advancement Self-Service, ensure that the Banner Web Tailor Advancement Self-Service Rules page (bwakwrul.P_ModifyPgWebRules) is set up properly. You must indicate whether to show job postings on the Web without being reviewed on the Organization Job Posting Form (AOAJPST).

Menu Options

The Career Opportunities menu (bmenu.P_CareerMnu) includes the following options:

- Current Advisor Commitments
- Sign Me Up to Be a Career Advisor
- Find a Career Advisor
- Search for Employment Opportunities
- Review Your Employment Opportunity Postings
- Add a Posting

Related Form

Use the Job Posting form (AOAJPST) to store job posting information. All organizations entered on this form must have a donor category.

Web Pages

This section provides details about the following Web pages:

- [“Current Advisor Commitments \(bwakadvs.P_Show_Advisor_Years\)”](#) on page 63
- [“Sign Me up to Be a Career Advisor \(bwakadvs.P_Make_Me_An_Advisor\)”](#) on page 65
- [“Find a Career Advisor \(bwakadvs.P_Find_An_Advisor\)”](#) on page 66
- [“Career Advisor Search Results \(bwakadvs.P_SearchResults\)”](#) on page 67
- [“Search for Employment Opportunities \(bwakjpst.P_Find_A_Job\)”](#) on page 68
- [“Employment Opportunities Search Results \(bwakjpst.P_SearchResults\)”](#) on page 69
- [“Your Employment Opportunity Postings \(bwakjpst.P_Show_Postings\)”](#) on page 70
- [“Employment Opportunity Detail \(bwakjpst.P_Show_Posting_Detail\)”](#) on page 71
- [“Add or Change a Posting \(bwakjpst.P_Add_A_Posting\)”](#) on page 72

Current Advisor Commitments (bwakadvs.P_Show_Advisor_Years)

The Current Advisor Commitments page displays the type of advising and the commitment years selected for the user. Additional records can be added by selecting the **Add a Year** button.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Activities Form (APAACTY)	Years field

Item	Description
Advancement Self-Service Rules page (bwakwrul.P_ModifyPgWebRules)	Advancement Self-Service Rules page, Default Advisor Activity Type field.

Web page fields

This page contains the following fields.

Item	Description/source information
Advising Years	Activities Form (APAACTY), Years field.
Type of Advising	Advancement Self-Service Rules page, Default Advisor Activity Type field. Activities Form (APAACTY), Activity field.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a Year	Goes to the Sign Me up to Be a Career Advisor page (bwakadv.P_Make_Me_An_Advisor)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Career Opportunities menu	bmenu.P_CareerMnu

Sign Me up to Be a Career Advisor (bwakadv.P_Make_Me_An_Advisor)

The Sign me up to be a Career Advisor page displays the current career advising commitments. This page also allows the user to add new advising records as needed. Selecting the **Submit** button results in the page refreshing to display the record just entered.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Select a year to add	Activities Form (APAACTY), Years field.
Select a Type of Advising	Advancement Self-Service Rules page, Default Advisor Activity Type field. Activities Form (APAACTY), Activity field.
Current Occupation Change my occupation	Advancement Individual Information Form (APACONS), Occupation Title field.

Updates to Banner

This page updates Banner as follows.

Item	Description
Submit	Updates APACONS

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Career Opportunities menu	bmenu.P_CareerMnu

Find a Career Advisor (bwakadv.s.P_Find_An_Advisor)

The Find a Career Advisor page provides the search options available to execute a query when attempting to locate an advisor. Any combination of the fields listed can be used. Selecting no values results in a query returning all existing Career Advisor records.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Enter a Class Year	Advancement Individual Information Form (APACONS), Class Year field.
Degree Major	Academic Information Form (APAADEG), Degree, Major fields.
Type of Advising	Advancement Self-Service Rules page, Default Advisor Activity Type field. Activities Form (APAACTY), Activity field.
Occupation	Advancement Individual Information Form (APACONS), Occupation Title field.
Industry Category	Employment History Form (APAEHIS), Standard Industry Code field.
Enter a City State or Province	Advancement Identification Form (APAIIDEN) Address window, City, State or Province fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Go find it!	Goes to the Career Advisor Search Results page (bwakadv.P_SearchResults)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Career Opportunities menu	bmenu.P_CareerMnu

Career Advisor Search Results (bwakadv.P_SearchResults)

The Career Advisor Search Results page displays all records that match the search selection criteria. Details displayed for each returned record vary depending on the institution settings and the details the advisor has approved for display on the Web.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Class Year	Advancement Individual Information Form (APACONS), Class Year field.
Degree, Major	Academic Information Form (APAADEG), Degree, Major fields.
Occupation	Advancement Individual Information Form (APACONS), Occupation Title field.

Item	Description/source information
Employer	Employment History Form (APAEHIS), Employer field. Employer information is displayed regardless of whether the employer is defined on the Advancement Organization Header Form (AOAORGN).
Address, Phone, E-mail	Address Review and Verification Form (GOAADDR), Address, City, State or Province, Telephone fields. E-mail Address Form (GOAEMAL), E-mail Address field.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Career Advisor Search Link	Goes to the Find a Career Advisor page (bwakadv.P_Find_An_Advisor)

Search for Employment Opportunities (bwakjpst.P_Find_A_Job)

The Search for Employment Opportunities page provides the search options available to execute a query when attempting to locate a position. Any combination of the fields listed can be used. Selecting no values results in a query returning all existing employment opportunity records.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Company, City, State, Job Category, Industry Category	Organization Job Posting Form (AOAJPST), ID, Location, Job Codes, Display on the Web fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Go find it!	Goes to the Employment Opportunity Search Results page (bwakjpst.P_SearchResults)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Career Opportunities menu	bmenu.P_CareerMnu

Employment Opportunities Search Results (bwakjpst.P_SearchResults)

The Employment Opportunities Search Results page displays all the records matching the search selection criteria. All existing details for the record are displayed.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Employer	Organization Job Posting Form (AOAJPST), ID, Location, Job Codes, Display on the Web fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
New Employment Search Link	Goes to Search for Employment Opportunities page (bwakjpst.P_Find_A_Job)

Your Employment Opportunity Postings (bwakjpst.P_Show_Postings)

The Your Employment Opportunity Postings page is used to post employment opportunities.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Posting information	Organization Job Posting Form (AOAJPST), ID, Location, Job Codes, Display on the Web fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a Posting	Goes to the Add or Change a Posting page (bwakjpst.P_Add_A_Posting)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Career Opportunities menu	bmenu.P_CareerMnu

Employment Opportunity Detail (bwakjpst.P_Show_Posting_Detail)

The Employment Opportunity Detail page displays all the existing information for the position selected. If e-mail details exist, the information is an active e-mail link. The user has the option to add a posting, change this posting, or delete this posting from this page.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
All information	Organization Job Posting Form (AOAJPST), ID, Location, Job Codes, Display on the Web fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a Posting	Goes to the Add or Change a Posting page (bwakjpst.P_Add_A_Posting)
Change this Posting	Goes to the Add or Change a Posting page (bwakjpst.P_Add_A_Posting)
Delete this Posting	Goes to the Your Employment Opportunity Postings page (bwakjpst.P_Show_Posting_Detail)

Add or Change a Posting (bwakjpst.P_Add_A_Posting)

The Add or Change a Posting page provides the details required to post a position for Web review.



Note: You can post positions to the listed employers only.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Employer	Organization Job Posting Form (AOAJPST), ID, Location, Job Codes, Display on the Web fields.

Updates to Banner

This page updates Banner as follows.

Item	Description
All information, except Employer	Updates AOAJPST

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add the Posting	Goes to the Your Employment Opportunity Postings page (bwakjpst.P_Show_Postings)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Career Opportunities menu	bmenu.P_CareerMnu

Voluntary Support

The Voluntary Support option gives advancement individuals and advancement organizations the ability to view giving history and make pledges and donations via the Web. They can perform the following functions:

- Make a donation to one campaign/designation combination at a time, using a credit card over the Web
- Split gifts with their spouses
- Display an employer's matching gift information while making the gift
- Create anticipated matching gift records
- View giving history
- Submit pledges via the Web

A user must have a Banner® ID (PIDM) to access the Voluntary Support pages in the Secure Area of Banner Advancement Self-Service. Users who do not have a Banner ID or do not know their PIDM can still share personal information, make donations, and view their giving history. See [“Using the Non-Secure Area of Advancement Self-Service” on page 77](#) for information about the procedures that support this functionality.

This chapter discusses the following topics:

- [“Setup” on page 74](#)
- [“Menu Options” on page 75](#)
- [“Related Forms” on page 75](#)
- [“Using the Non-Secure Area of Advancement Self-Service” on page 77](#)
- [“Web Pages” on page 79](#)

Setup

Before implementing the Voluntary Support function of Banner Advancement Self-Service, ensure that the following sections of the Banner Web Tailor Advancement Self-Service Rules page (bwakwrul.P_ModifyPgWebRules) are properly set up:

- Pledge Rules
- Gift Rules
- Giving History Display Rules

Menu Options

The Voluntary Support menu (bmenu.P_GivingMnu) includes the following links:

- View Giving History
- Add a Pledge
- Make a Donation

Related Forms

When the Voluntary Support option is implemented, the following forms are either used to control the display of information via the Web or control information that may be updated by the user via the Web.

Review External Pledge Form (AGAWPLG)

This form allows the institution to review pledges made from the Web, make changes, and indicate that a real pledge can be created in the database. Gifts entered over the Web, when confirmed, create a record in the gift tables the same as the gifts entered via the Gift Form (AGAGIFT).

Advancement Prospect Information Form (AMAINFO)

This form has field indicators that determine whether the Web user can make Web gifts, Web pledges, or both. If the Web indicators are not checked, that user cannot enter a pledge or gift via the Web pages.

Campaign Detail Form (AFACAMP)

This form has indicators that determine whether the campaign/designation accepts Web gifts, Web pledges, or both.

The **Allow Web Gifts** and **Allow Web Pledges** check boxes on the Base Information window determine whether the campaign accepts Web gifts and pledges. These indicators are used with indicators on the Designation Form (ADADESG) when creating a new designation record for a campaign.

The **Allow Web Gifts** and **Allow Web Pledges** check boxes on the Designations window determine whether the campaign/designation accepts Web gifts and pledges. This processing is used with indicators on the Base Information window and on the Designation Form (ADADESG) when creating a new designation record for a campaign.

If a Web indicator is set to N at the campaign level, the corresponding Web indicator is set to N on the Designations window. If a Web indicator is set to N at the designation level, the corresponding Web indicator is set to N on the Designations window.

The following matrix represents the default campaign and designation Web processing:

	AFACAMP Base Information window	ADADESG	AFACAMP Designations window
Allow Web...	Y	Y	Y
	Y	N	N
	N	Y	N
	N	N	N

The default settings can be manually overridden for any campaign/designation combination on the Designations window. If the **Allow Web Gifts** check box or the **Allow Web Pledges** check box on ADADESG is changed to unchecked (N), the corresponding Web indicator is set to N on the Designations window for all campaigns where the designation exists.

Designation Form (ADADESG)

This form's start and end dates determine whether the designation accepts Web gifts, Web pledges, or both. The **Allow Web Gifts** and **Allow Web Pledges** indicators are used with indicators on the Campaign Header Form (AFACAMP) when creating a new designation record for a campaign.

Pledge Type Validation Form (ATVPLDG)

This form has a field indicator that determines which pledges are displayed on the Web.

Gift/Payment Type Validation Form (ATVGIFT)

This form has an indicator that determines which gifts are displayed on the Web.

Duration Code Validation Form (ATVPDUR)

This form has an indicator that determines whether or not this information is displayed on the Web.

Frequency Code Validation Form (ATVFREQ)

This form has an indicator that determines whether or not this information is displayed on the Web.

Gift Form (AGAGIFT)

This form allows the institution to review gifts made from the Web.

Pledge/Gift Adjustment Form (AGAADJS)

This form allows the institution to make any necessary changes to the Web gifts.

Gift List Form (AGCGIFT)

This form allows the institution to review the complete list of gifts for the advancement individual or advancement organization. The list include all gifts including the Web gifts.

Gift Soft Credit ID Form (AGAGMEM)

This form allows the institution to review and make any necessary changes to the soft credit record.

Gift Hard Credit ID Form (AGAGIDS)

This form allows the institution to review and make any necessary changes to the hard credit record.

Using the Non-Secure Area of Advancement Self-Service

The Alumni and Friends menu includes the following links:

- **My Information:** Used to add or change personal details, change a PIN, or change the security question and answer. If personal details were previously entered, current details from the hold table are displayed in the appropriate fields. Basic fields are required.
- **Make a Donation:** Used to collect campaign, designation, comments, and amount for processing a Web credit card gift.
- **View My Giving History:** Used to view details of gifts made before the Banner ID is created.

These links do not require a Banner ID (PIDM), but they do require an ID and PIN to be entered. “Smart” logic handles the ID and PIN entries as follows:

- If the ID and PIN exist in the APBWIDN table, the user is automatically granted access to the appropriate page described in this section (PIDM not required).
- If the ID and PIN exist in the GOBT PAC table, the user is automatically granted access to the appropriate page in the Secure Area of Banner Advancement Self-Service.
- If the ID does *not* exist in either the GOBT PAC or APBWIDN table, this message is displayed: *User ID does not exist. Please check your User ID and try again or log in as a First-Time User.* The login page is redisplayed for the user to reenter the ID/PIN or create a new user account.
- If the ID/PIN combination does *not* exist in either the GOBT PAC or APBWIDN table, the following message is displayed: *Invalid PIN entered for User ID. Please enter correct PIN for this User ID.* The login page is redisplayed for the user to reenter the ID/PIN or create a new user account.

Creating a User ID and PIN

A Web user can create an ID and PIN in the unsecured area of Banner Advancement Self-Service.

1. Select the desired link (My Information, Make a Donation, or View my Giving History) on the Alumni and Friends menu.

The Login page is displayed.

2. Select the **First time user account creation** option.

The New User page is displayed.

3. Enter an ID, PIN, and PIN verification.

4. Select the **Login** button.

The Security Question and Answer page is displayed.

5. Enter a security question and answer.

6. Select the **Submit** button.

The Personal Information page is displayed.

7. Enter personal information.

8. Select the **Submit** button.

The originally selected page is displayed.

The next time the user logs into the Web, the user can log in using the login ID and PIN. The previously described “smart” logic is performed.

Creating Gifts Without a Banner ID

Once the user create a user ID and PIN and enters basic personal information (see previous instructions), the user can select the Make a Donation option from the menu to submit an online gift. The Make a Donation page is similar to the online donation page that requires a Banner ID. The user is redirected to the payment processing vendor where payment card details are captured and validated. When the gift is created, a confirmation message is displayed. The gift details are stored in a hold table until they are viewed and processed within Banner.

After a gift is created, View Giving History can be selected from the menu. This history page, which is similar to the All Existing Gifts view that requires a Banner ID, displays a list of gifts with the option to view gift details via an active link defined for the gift amount. The user can only see those gifts that exist in the hold table. Total giving history options are not available until the person is matched with an existing Banner ID or a new Banner ID is created. Once this connection to Banner is made, giving history is available through the View Giving History option within the Banner Secure Area.

Processing Gifts Within Banner

When a gift is created and submitted without a Banner ID, the process sends a message to the user ID identified in the Advancement Self-Service Rules page that a Web gift from a new user was created and that a gift record is waiting to be reviewed. The notification provides better response time and helps guarantee that no new gifts sit without being reviewed. The designated user ID uses the Review External Person Form (APAWPRS) to review the gift and give the user a Banner ID.

Once the gift is reviewed and a baseline Banner ID is created, the user can access options in the Secure Area, based on the role of the ID.

Credit Card Processing

A person who creates an ID via the Web can make a credit card gift using that ID. The payment pages in the unsecure area are only available until the person is matched with an existing Banner ID or a new Banner ID is created. Once this connection to Banner is made, a credit card gift is made through the Make a Donation option within the Secure Area.

Web Pages



Note: A user must have a Banner ID (PIDM) to access the Voluntary Support pages in the Secure Area of Banner Advancement Self-Service. Users who do not have a Banner ID (PIDM) or do not know their PIDM can still share personal information, make donations, and view their giving history via links on the Alumni and Friends menu. These functions require

a user to create a login ID and PIN. The ID and PIN are stored on the APBWIDN hold table until your institution verifies them. Once verified, the ID and PIN are moved to the Banner tables. See [“Using the Non-Secure Area of Advancement Self-Service” on page 77](#) for more information.

This section provides details about the following Web pages:

Secure area, Banner ID required

- [“Giving History \(bwakchis.P_View_History\)” on page 81](#)
- [“Gift Detail \(bwakchis.P_ViewGift_Detail\)” on page 83](#)
- [“Pledge Detail \(bwakchis.P_ViewPledge_Detail\)” on page 84](#)
- [“Add a Pledge \(bwakpldg.P_Add_A_Pledge\)” on page 85](#)
- [“Make a Donation \(bwakgift.P_Make_A_Donation and bwakgift.P_Pledge_Payment\)” on page 87](#)
- [“Credit Card Payment \(bwakgift.P_Pledge_Payment\)” on page 88](#)
- [“Credit Card Payment Status \(bwakgift.P_Donation_Receipt and bwakcpmt.P_CCPaymentStatus\)” on page 89](#)
- [“Online Receipt \(bwakgift.P_Donation_Receipt\)” on page 90](#)

Non-secure area, Banner ID non required

- [“Advancement Login \(bwakalog.P_DisplLoginNon\)” on page 91](#)
- [“User Logout \(bwakalog.P_DisplLogoutNon\)” on page 92](#)
- [“Advancement Login \(bwakalog.P_DisplPinLocked\)” on page 93](#)
- [“Security Question and Answer \(bwakalog.P_SecurityQuestion\)” on page 93](#)
- [“New User \(bwakalog.P_DisplLoginNew\)” on page 94](#)
- [“Personal Information \(bwakalog.P_PersInfo\)” on page 95](#)
- [“Change My PIN \(bwakalog.P_Pin_Change\)” on page 96](#)
- [“PIN Change Procedure \(bwakalog.P_ProcPinChange\)” on page 97](#)
- [“Make a Donation \(bwakngft.P_Make_A_Donation\)” on page 98](#)
- [“Credit Card Payment Status \(bwakngft.P_CCPaymentSubmitted\)” on page 99](#)
- [“Online Receipt \(bwakngft.P_Donation_Receipt\)” on page 100](#)
- [“Giving History \(bwaknhis.P_View_Gifts\)” on page 101](#)
- [“Gift Detail \(bwaknhis.P_ViewGift_Details\)” on page 102](#)

Giving History (bwakchis.P_View_History)

Advancement individuals and advancement organizations can view and sort their giving history information using the following options on the Giving History page:

- Totals by Fiscal Year
- Totals by Campaign and Fiscal Year
- Totals by Designation and Fiscal Year
- All Existing Gifts
- All Existing Pledges
- All Existing Gifts and Pledges
- Combined Giving
- Overall Giving

Pledge totals depend on the **Include in Giving** indicator on the Pledge Status Code Validation Form (ATVPSTA). If this indicator is selected for a pledge status code, then all pledges with that status code are included in the pledge totals.

The following conditions determine which pledge and gift details are displayed:

- A pledge is displayed if its type code, defined on the Pledge Type Validation Form (ATVPLDG), is flagged for display on the Web.
- A gift is displayed if its type code, defined on the Gift/Payment Type Validation Form (ATVGIFT), is flagged for display on the Web.
- Zero-amount pledges and gifts are never displayed to advancement individuals and advancement organizations. (Planned giving pledges and gifts are the only transactions that can have a zero amount.)

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Totals by Fiscal Year	Giving History by Fiscal Year Form (APAFHIS) The Pledge Credit calculation depends on the ATVPSTA settings.

Item	Description/source information
Totals by Campaign and Fiscal Year	Giving History by Campaign Form (APACHIS) The Pledge Credit calculation depends on the ATPVSTA settings.
Totals by Designation and Fiscal Year	Giving History by Designation Form (APADHIS) The Pledge Credit calculation depends on the ATPVSTA settings.
All Existing Gifts	Gift List Form (AGCGIFT) Displays type, date, credit, amount, campaign, and designation information for all existing gifts. For gifts with multiple campaign and designation records, the detail is sorted first by date, then alphabetically by campaign, and then alphabetically by designation within campaign.
All Existing Pledges	Pledge List Form (AGCPLDG) Displays date, credit, amount, balance, campaign, and designation information for all existing pledges. For pledges with multiple campaign and designation records, the detail is sorted first by date, then alphabetically by campaign, and then alphabetically by designation within campaign.
All Existing Gifts and Pledges	Gift List Form (AGCGIFT) Pledge List Form (AGCPLDG) Displays type, date, credit, amount, balance, campaign, and designation information for all existing gifts and pledges. For gifts/pledges with multiple campaign and designation records, the detail is sorted first by date, then alphabetically by campaign, and then alphabetically by designation within campaign.
Combined Giving	Combined Giving History Summary Form (APACOMB) The Pledge Credit calculation depends on the ATPVSTA settings.
Overall Giving	Giving History Summary Form (APAGHIS) The Number of Pledges and Pledged calculations depend on the ATPVSTA settings.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
View Giving History	Goes to the Giving History page (bwakchis.P_View_History)
Add a Pledge	Goes to the Add a Pledge page (bwakpldg.P_Add_A_Pledge)
Make a Donation	Goes to the Make a Donation page (bwakgift.P_Make_A_Donation)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Voluntary Support menu	bmenu.P_GivingMnu

Gift Detail (bwakchis.P_ViewGift_Detail)

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
<i>Gift Detail:</i> Date, Amount, Gift Type, Gift Number	Gift List Form (AGCGIFT)
<i>Allocation:</i> Campaign, Designation, Amount Given, Pledge Number	Gift List Form (AGCGIFT)
<i>Hard Credit:</i> Name, Campaign, Designation, Credit Amount	Gift Hard Credit ID List Form (AGCGMLT)

Item	Description/source information
<i>Soft Credit:</i> Name, Campaign, Designation, Credit Amount	Gift Soft Credit ID List Form (AGCGMMO)

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
View Giving History	Goes to the Giving History page (bwakchis.P_View_Gift)
Add a Pledge	Goes to the Add a Pledge page (bwakpldg.P_Add_A_Pledge)
Make a Donation	Goes to the Make a Donation page (bwakgift.P_Make_A_Donation)

Pledge Detail (bwakchis.P_ViewPledge_Detail)

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
<i>Pledge Detail:</i> Date, Amount, Balance, Status, Pledge Type, Pledge Number	Pledge List Form (AGCPLDG)
<i>Allocation:</i> Campaign, Designation, Amount Pledged, Amount Paid	Gift List Form (AGCGIFT)

Item	Description/source information
<i>Payments:</i> Date, Gift Type, Campaign, Designation, Amount	Pledge/Gift List Form (AGAPPAY)
<i>Hard Credit:</i> ID, Name, Campaign, Designation, Credit Amount, 3PP Amount	Pledge Hard Credit ID List Form (AGCPMLT)
<i>Soft Credit:</i> ID, Name, Campaign, Designation, Credit Amount, 3PP Amount	Pledge Soft Credit ID List Form (AGCPMMO)
<i>Installments:</i> Number, Date Due, Amount Due, Amount Paid	Pledge Installment Form (AGAPINS)

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
View Giving History	Goes to the Giving History page (bwakchis.P_View_Gift)
Add a Pledge	Goes to the Add a Pledge page (bwakpldg.P_Add_A_Pledge)
Make a Donation	Goes to the Make a Donation page (bwakgift.P_Make_A_Donation)

Add a Pledge (bwakpldg.P_Add_A_Pledge)

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Campaign/Designation, Split Credit with your Spouse?	Campaign Detail Form (AFACAMP), Campaign, Designation fields
Duration	Duration Validation Form (ATVPDUR), Months field Reviewed External Pledges Form (AGAWPLG), Duration field
Frequency	Frequency Code Validation Form (ATVFREQ), Code, Description fields

Updates to Banner

This page updates Banner as follows.

Item	Description
All items	Reviewed External Pledges Form (AGAWPLG)

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Send Pledge	Goes to the Voluntary Support menu (bmenu.P_GivingMnu)
View Giving History	Goes to the Giving History page (bwakchis.P_View_Gift)
Add a Pledge	Goes to the Add a Pledge page (bwakpldg.P_Add_A_Pledge)
Make a Donation	Goes to the Make a Donation page (bwakgift.P_Make_A_Donation)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Voluntary Support menu	bmenu.P_GivingMnu

Make a Donation (bwakgift.P_Make_A_Donation and bwakgift.P_Pledge_Payment)

The Make a Donation page gives advancement individuals and advancement organizations the option of either making a pledge payment (if outstanding pledges exist) or making a new gift. For pledge payments, pledge details default as appropriate based on the record selection. For new gifts, the page allows users to select or enter the appropriate details as needed.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Yes/No	Indicates whether to pay against an existing pledge (YES) or to make a new gift (NO). This option is displayed only if pledges with outstanding balances exist.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a Pledge	Goes to the Add a Pledge page (bwakpldg.P_Add_A_Pledge)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Voluntary Support menu	bmenu.P_GivingMnu

Credit Card Payment (bwakgift.P_Pledge_Payment)

The Credit Card Payment page allows donors to make credit card payments via the Web. This page collects and displays the following information:

- Campaign and designation to which the donor has chosen to donate.
- Gift amount.
- Choice to split the gift with the spouse.
- Employer matching donation information. If employer matching donation information is not already stored in Banner, an option is displayed so the donor can enter the information.
- Comments for the incoming Web gifts.



Note: This is an e-mail option, and the information is not saved in Banner.

The Submit Payment button redirects the user to an external payment vendor, passing common parameters. The user enters payment card information in the payment vendor's application. The payment vendor tries to authorize the payment then calls a Web service. The Web service updates Banner with the results of the authorization. Then the payment vendor redirects the user to the Credit Card Payment Status page with an appropriate message.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Campaign Detail Form (AFACAMP)	Select the Allow Web Gifts check box for those each record that you want to be available for Web gifts.
Crosswalk Validation Form (GTVSDAX)	Define the order in which campaigns and designations are to be displayed as explained in "Campaigns and Designations" on page 20 .

Web page fields

This page contains the following fields.

Item	Description/source information
Gift Campaign, Designation	Campaign Detail Form (AFACAMP), Campaign, Designation fields
Spouse Split Detail	Cross Reference Form (APAXREF), Name/ID fields based on the spouse cross reference and split rules

Item	Description/source information
Employer Matching Information	Organization Header Form (AOAORGN), MG % field based on the employer cross reference for record

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a Pledge	Goes to the Add a Pledge page (bwakpldg.P_Add_A_Pledge)
View Giving History	Goes to the Giving History page (bwakchis.P_View_History)
Make a Donation	Goes to the Make a Donation page (bwakgift.P_Make_A_Donation)

Credit Card Payment Status (bwakgift.P_Donation_Receipt and bwakcpmt.P_CCPaymentStatus)

Once the payment processing is completed, the Credit Card Payment Status page is displayed. This page notifies the donor of the request status and whether the payment was credited to the account.

The bwakgift.P_Donation_Receipt page is displayed if the payment is successful. The bwakcpmt.P_CCPaymentStatus page is displayed if the payment fails.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page updates Banner as follows.

Item	Description
Gift Date, Gift Number, Gift Amount, Gift Campaign, Gift Designation, Gift Pledge Number, Fiscal Year, Type, Vehicle, Class 1	Updates AGAGIFT
Payment indicator, Split indicator, Soft (if soft credit), MG gift detail (if needed)	Gift List Form (AGCGIFT)



Note: This update is processed via the baseline `agkgift.P_CreateGift` package.procedure.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a Pledge	Goes to the Add a Pledge page (<code>bwakpldg.P_Add_A_Pledge</code>)
View Giving History	Goes to the Giving History page (<code>bwakchis.P_View_History</code>)
Make a Donation	Goes to the Make a Donation page (<code>bwakgift.P_Make_A_Donation</code>)

Online Receipt (`bwakgift.P_Donation_Receipt`)

The Online Receipt page provides summary information that donors can print for their records. It contains the following gift information: donor's name, ID, gift number, name of the campaign/designation that benefits from the gift, gift amount, comments (if any), and date. It also displays the payment amount and authorization code for the credit card.

The text on the receipt can be customized by your institution using Banner Web Tailor.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Name, ID, Gift Number, Gift Campaign/ Designation Amount, Total Gift Amount, Gift Date, Comment	Gift List Form (AGCGIFT): Name, ID, Number, Campaign, Designation, Amount, Date fields The name does not include the last name prefix.
Amount, Authorization Code	Displayed from Credit Card Payment Status page

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a Pledge	Goes to the Add a Pledge page (bwakpldg.P_Add_A_Pledge)
View Giving History	Goes to the Giving History page (bwakchis.P_View_History)
Make a Donation	Goes to the Make a Donation page (bwakgift.P_Make_A_Donation)

Advancement Login (bwakalog.P_DisplLoginNon)

The Advancement Login page enables a Web user to log in with a previously defined login ID and PIN, or to request a new login ID and PIN to be created. Web users who try to access a page on the Alumni and Friends menu are forced to log in. Then they are forwarded to the requested page.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
First time user account creation	Goes to the New User page (bwakalog.P_DisLoginNew)
Return to Homepage	Returns to the main menu

User Logout (bwakalog.P_DisLogoutNon)

The User Logout page is displayed when the **Exit** link at the top of pages generated by the bwakalog, bwakngft, and bwaknhis packages is selected.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page updates Banner as follows.

Item	Description
Activity date	Updates APBWIDN

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Back to Homepage	Returns to the main menu

Advancement Login (bwakalog.P_DispNetLocked)

The Advancement Login page is displayed when a user exceeds the maximum number of failed login attempts.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Back to Homepage	Returns to the main menu

Security Question and Answer (bwakalog.P_SecurityQuestion)

The Security Question and Answer page allows the user who selected the I forgot my PIN option to answer a predefined question to access PIN information. When the user enters the correct answer, the next page forces the user to reset the PIN.

The validation is based on the incoming information entered in the answer field. If the user enters invalid information, the message displays *Authorization Failure – Invalid Answer*

and the user is able to answer the question again. The number of attempts allowed before freezing access is the same as the limit set in the twbkwbis.P_ProcSecurityAnswer package.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Personal Information	Goes to the Personal Information page (bwakalog.P_PersInfo)
Change my PIN	Goes to the Change My PIN page (bwakalog.P_Pin_Change)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
My Information menu	bmenu.P_AluNonSecurePersMnu

New User (bwakalog.P_Dis>LoginNew)

The New User page enables a Web user who does not have an ID or does not know the ID to create a login ID and PIN. The PIN must conform to the rules set up on the Enterprise PIN Preferences Form (GUAPPRF). This login ID and PIN are stored on the APBWIDN table until verified by your institution. Once verified, the ID and PIN are moved to the Banner baseline tables.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page updates Banner as follows.

Item	Description
Login information	Updates APBWIDN

Personal Information (bwakalog.P_PersInfo)

The Personal Information page enables the user to enter name, address, relationship with the institution, and other biographical/demographic information that may be helpful in identifying the Web user within Banner baseline.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Donor Category Validation Form (ATVDONR)	Enter Y in the Display on Web field for each donor category you want to be available on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
Personal Information	All items on this page are displayed from the APBWIDN table. This information can be reviewed on the Review External Person Form (APAWPRS).

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Change my PIN	Goes to the Change My PIN page (bwakalog.P_Pin_Change)
Change my Security Question and Answer	Goes to the Security Question and Answer page (bwakalog.P_SecurityQuestion)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
My Information menu	bmenu.P_AluNonSecurePersMnu

Change My PIN (bwakalog.P_Pin_Change)

The Change My PIN page enables Web users to change their PINs.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Personal Information	Goes to the Personal Information page (bwakalog.P_PersInfo)
Change my Security Question and Answer	Goes to the Security Question and Answer page (bwakalog.P_SecurityQuestion)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
My Information menu	bmenu.P_AluNonSecurePersMnu

PIN Change Procedure (bwakalog.P_ProcPinChange)

This procedure processes the information entered on the Change my PIN page and updates the APBWIDN table. This is a procedure, not a Web page.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page updates Banner as follows.

Item	Description
PIN data	Updates APBWIDN

Make a Donation (bwakngft.P_Make_A_Donation)

The Make a Donation page is used to collect campaign, designation, amount, and comments used to process Web credit card gifts from users who do not have a Banner ID (PIDM) or do not know their PIDM.

The Submit Payment button redirects the user to an external payment vendor, passing common parameters. The user enters payment card information in the payment vendor's application. The payment vendor tries to authorize the payment then calls a Web service. The Web service updates Banner with the results of the authorization. Then the payment vendor redirects the user to the Credit Card Payment Status page with an appropriate message.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Campaign Detail Form (AFACAMP)	Select the Allow Web Gifts check box for those each record that you want to be available for Web gifts.
Crosswalk Validation Form (GTVSDAX)	Define the order in which campaigns and designations are to be displayed as explained in "Campaigns and Designations" on page 20 .

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
My Information	Goes to the My Information page (bmenu.P_AluNonSecurePersMnu)
Make A Donation	Goes to the Make A Donation page (bwakngft.P_Make_A_Donation)
View my Giving History	Goes to the Giving History page (bwaknhis.P_View_Gifts)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Alumni and Friends menu	bmenu.P_AluNonSecureMnu

Credit Card Payment Status (bwakngft.P_CCPaymentSubmitted)

The Credit Card Payment Status page shows the result of processing the credit card payment through the payment vendor. If the credit card is accepted, an 'Approval' message is received and the donation is processed into the holding tables (AGBGHLD and AGRGHDE).

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Reorder or Customize Information Text Page in Banner Web Tailor	Customize the text for the messages returned by this page by specifying Info Text for the bwakcpmt.P_CCPaymentStatus process.

Web page fields

This page does not contain any fields.

Updates to Banner

This page updates Banner as follows.

Item	Description
Approval	Updates AGBGHLD and AGRGHDE

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
My Information	Goes to the My Information page (bmenu.P_AluNonSecurePersMnu)
Make a Donation	Goes to the Make a Donation page (bwakngft.P_Make_A_Donation)
View My Giving History	Goes to the Giving History page (bwaknhis.P_View_Gifts)

Online Receipt (bwakngft.P_Donation_Receipt)

The Online Receipt page provides summary information that donors can print for their records. It contains the following gift information: donor's name, ID, gift number, name of the campaign/designation that benefits from the gift, gift amount, comments (if any), and date. It also displays the payment amount and authorization code for the credit card.

The text on the receipt can be customized by your institution using Banner Web Tailor.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Name, ID, Gift Number, Gift Campaign/ Designation Amount, Total Gift Amount, Gift Date, Comments	Review on Gift List Form (AGCGIFT), Name, ID, Number, Campaign, Designation, Amount, Date
Payment Amount, Authorization Code	Displayed from Credit Card Payment Status page

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
My Information	Goes to the My Information page (bmenu.P_AluNonSecurePersMnu)
Make a Donation	Goes to the Make a Donation page (bwakngft.P_Make_A_Donation)
View My Giving History	Goes to the Giving History page (bwaknhis.P_View_Gifts)

Giving History (bwaknhis.P_View_Gifts)

The Giving History page lists donations made by a user accessing Banner Advancement Self-Service without a Banner ID. The page displays only those gifts that have not yet been processed on the Review External Gifts Form (AGAWGIF). Once the Banner ID is created or matched to an existing Banner ID and the gifts are processed on AGAWGIF, a user can see complete giving history in the Secure Area of Banner Advancement Self-Service.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
All Gifts	<p>Gifts made in the Alumni and Friends area of Banner Advancement Self-Service are stored in the AGBGHLD and AGRGHDE tables. Selecting the amount displays details about the gift.</p> <p>For gifts with multiple campaign and designation records, the detail is sorted first by date, then alphabetically by campaign, and then alphabetically by designation within campaign.</p>

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
My Information	Goes to the My Information page (bmenu.P_AluNonSecurePersMnu)
Make a Donation	Goes to the Make a Donation page (bwakngft.P_Make_A_Donation)
View My Giving History	Goes to the Giving History page (bwaknhis.P_View_Gifts)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Alumni and Friends menu	bmenu.P_AluNonSecureMnu

Gift Detail (bwaknhis.P_ViewGift_Details)

The Gift Detail page displays detail information for gifts made by the Web user accessing the Make a Donation page without a Banner ID. The page displays only those gifts that have not yet been processed on the Review External Gifts Form (AGAWGIF). Once the Banner ID is created or matched to an existing Banner ID and the gifts are processed on AGAWGIF, a user can see complete giving history in the Secure Area of Banner Advancement Self-Service.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Gift Detail	Date , Amount , Gift Type , and Gift Number are retrieved from the AGBGHLD table.
Allocation	Campaign , Designation , and Amount Given are retrieved from the AGRGHDE table.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
My Information	Goes to the My Information page (bmenu.P_AluNonSecurePersMnu)
Make a Donation	Goes to the Make a Donation page (bwakngft.P_Make_A_Donation)
View My Giving History	Goes to the Giving History page (bwaknhis.P_View_Gifts)

Volunteer

The Volunteer option provides the ability to manage contacts assigned to the user, in the capacity of a volunteer. The Volunteer tab is displayed on the main menu of Self-Service as long as the user is identified as an advancement individual in Banner (via the APACONS form). This same logic is also used to determine whether the Alumni and Friends tab displays for the user.

This chapter discusses the following topics:

- [“Configuring Volunteer Options” on page 104](#)
- [“Volunteer Options” on page 105](#)
- [“Web Pages” on page 107](#)

Configuring Volunteer Options

The following procedures allow you to configure your Volunteer options:

- [“Define Web Tailor Parameters” on page 104](#)
- [“Modify the Self-Service Link” on page 105](#)

Define Web Tailor Parameters

To impact the volunteers functionality, configure these two parameters in the Advancement Self-Service Rules within the WebTailor Administration tab:

- **Contact Assignment Start Date.** Enter earliest date for which you want the contact assignments to display.
- **Contact Assignment End Date.** Either leave blank or enter the latest date for which you want contact assignments to display.

The date of the contact assignment as indicated on AFACLST or ASASANG are used with the first two parameters above to determine which contact assignments should display.

Modify the Self-Service Link

Complete the following steps to modify the information displayed for this Self-Service link:

1. Select the Web Tailor Administration tab.
2. Select the Menu Items option.
3. Select the hyperlink for the Volunteer menu (bmenu.P_VolOppMnu.)

You can add a new local menu item so and customize this link, as desired. For example, alter the link to point to an institutional site where alumni can find additional volunteer information.

Volunteer Options

Users can choose from the following options on the Volunteer tab:

- [“Manage my Contacts” on page 105](#)
- [“More information on ways you can volunteer to help the University” on page 107](#)

Manage my Contacts

When this option is selected, the volunteer user is presented with a list of their contact assignments on the View or Update Contact Information page. The user chooses the desired contact from the drop-down and selects the View Details button. The View Contact Detail Information page is then displayed. This page contains two sections:

- **Contact Name and Address.** Basic information for the contact.
- **Contact Assignment Detail.** A list of contact assignment records for this volunteer. Within this section, the user can also click the **Add a Result** or **View Results** hyperlinks. These links allow the user to enter or view the results of their communications related to the selected contact assignment record.

At the bottom of the page, the user can click the **Select another Contact** link to view information for one of the user’s other contact assignments. This link returns the user to the View or Update Contact Information page where they can select a different contact from the drop-down.

The following tasks can be performed:

- [“Adding a result to the contact record” on page 106](#)
- [“Viewing results” on page 106](#)
- [“Creating a volunteer contact assignment in Banner” on page 107](#)

Adding a result to the contact record

To record the results of a communication with the listed assigned contact, click the **Add a Result** link, and enter the following information:

- **Contact Type.** (Optional) This drop-down value is controlled by the data on the Solicitor Contact Code Validation form (ATVSCNT) in Banner. Only values that have the Web Indicator checked will display in Self-Service.
- **Contact Result.** (Optional) This drop-down value is controlled by the data on the Solicitor Contact Result Code Validation form (ATVSCRS) form in Banner. Only values that having the Web Indicator checked will display in Self-Service.
- **Contact Date.** (Optional) Defaults to today's date but can be overridden.
- **Ask Amount.** (Optional) Allows entry of an ask amount if applicable for this Result.
- **Comments.** (Optional) Additional information you can enter about the Result.

Click **Add Result** to save the information. The user is automatically redirected to the View Contact Detail Information page.

If needed, click **Reset** to clear the information from all of the fields.

The saved contact records are written to the appropriate Banner table(s) and display on the Results tab of the form that corresponds to the specific contact assignment. For additional details, see [“Creating a volunteer contact assignment in Banner” on page 107](#).

Viewing results

To view results for the selected contact, click the **View Results** link. On the View Contact Results page, you see the various results for the contact assignment. The result records are displayed in the order of assigned sequence number with the highest number displaying first. This page displays all data entered by the volunteer for each record. If any of the fields were left blank during record creation, the field and corresponding label do not display on this page.

Click the **Select Other Results** link on the bottom of the page to return to the View Contact Detail Information page.

Creating a volunteer contact assignment in Banner

Banner supports the following methods for creating Contact Assignments for volunteers that are displayed in Self-Service:



Note: In Banner, volunteers are identified as solicitors.

- **Campaign level assignments.** Managed in Banner through the use of the solicitor/contact assignment function on AFACLST.
- **Campaign and Solicitor Organization assignments.** Managed in Banner through the use of the solicitor/contact assignment function on AFACLST. In this case, both the campaign and a particular solicitor organization are assigned.
- **Solicitor Organization and Year assignments.** Managed in Banner through the use of the solicitor /contact assignment function on ASASANG.

More information on ways you can volunteer to help the University

This is a link that can be customized by the institution. When selected by the user, it can point to the appropriate URL to allow the Volunteer to understand other volunteer opportunities at the institution. The steps below provide information on how this link can be customized by the institution. Typically, this functionality would be restricted to appropriate administrators at the institution.

Web Pages

This section provides details about the following Web pages:

- [“View or Update Contact Information \(bwakvopp.P_ViewContacts\)” on page 108](#)
- [“View Contact Detail Information \(bwakvopp.P_View_Contact_Detail\)” on page 108](#)
- [“Add a Result \(bwakvopp.P_AddContact_Results\)” on page 109](#)
- [“View Results \(bwakvopp.P_ViewContact_Results\)” on page 109](#)

View or Update Contact Information (bwakvopp.P_ViewContacts)

The View or Update Contact Information page displays those contacts assigned to the user.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Volunteer Opportunities menu	bmenu.P_VolOppMnu

View Contact Detail Information (bwakvopp.P_View_Contact_Detail)

The View Contact Detail Information page displays all existing contact records for the name selected. The user has the option to add a result or view existing result records for each contact record.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Add a Result (bwakvopp.P_AddContact_Results)

The Add a Result page allows the user to enter and submit the required details to insert a result record for the contact selected.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add a Result	Goes to the Add Contact Results (bwakvopp.P_AddContact_Results) page.
View Results	Goes to the View Contact Results (bwakvopp.P_ViewContact_Results) page
Select another Contact	Goes to the View or Update Contact Information (bwakvopp.P_ViewContacts) page

View Results (bwakvopp.P_ViewContact_Results)

The View Results page displays all the existing result records for the contact Assign selected. The result records are displayed in the order of assigned sequence number with the highest number displaying first.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Add Result	Goes to the View Contact Detail Information (bwakvopp.P_View_Contact_Detail) page
Select Other Results	Goes to the View Contact Detail Information (bwakvopp.P_View_Contact_Detail) page

Advancement Officers

The Advancement Officers option provides the ability to review constituent information via the Web. This gives advancement officers the ability to access information in the Banner® Advancement database while they are traveling. They can create custom searches to locate records. They can view and update appropriate information via the Web.

Advancement officers can do the following via the Web:

- Create custom searches
- Indicate the format to display profiles
- View predefined profiles for selected advancement individuals, advancement organizations, and prospects
- View the giving history for advancement individuals and advancement organizations
- Enter contacts, which can be used to generate letters, send e-mail, and perform follow-up actions
- View moves for advancement individuals and advancement organizations
- View moves for a date or date range
- View passed planned moves
- Add or update moves, if given appropriate permission

This chapter discusses the following topics:

- [“Setup” on page 112](#)
- [“Menu Options” on page 112](#)
- [“Related Forms” on page 113](#)
- [“Web Pages” on page 114](#)
- [“Management of Proposal Records” on page 206](#)

Setup

Each advancement officer needs a Web role and profile preferences.

Web Roles

Two Web roles exist in the TWTVROLE table and must be assigned to individual users via Banner Web Tailor. Use the Web Tailor Administration Update User Role page (twbkuro1.P_UpdateUserRoles) to assign one of the following roles:

- Advancement Officer (DEVELOPMENTOFFICE): Assign this role to anyone who should have access to the pages under the Advancement Officers menu, including the pages under the Moves Management submenu.
- Advancement Moves Manager (MOVESMANAGER): Assign this role to anyone who should have access to the Add a Move and Update a Move pages under the Moves Management submenu of the Advancement Officers menu.

Profile Preferences

Profile preferences do not need to be loaded for each advancement officer. When an advancement officer access a page to set the preferences, the profile preferences are built for that individual from system defaults. If no profile preference exists for an individual, the defaults set on the Advancement Officer Web Profile Items Validation Form (ATVDOWP) are used.

Menu Options

The Advancement Officers menu (bmenu.P_Dev_Off_Mnu) includes the following options with associated links:

Menu Option	Links
Manage My Prospects	
Preferences	Manage My Prospects Preferences General Profile Advancement Individual Profile Advancement Organization Profile Prospect Profile Passed Planned Moves Exist

Menu Option	Links
Moves Management	Add a Contact Add a Move Current Moves Planned Moves by Date Moves by Constituent Moves Search Passed Planned Moves Exist
View/Edit Contacts	
Add a Contact	
Advancement Officer Searches	Population Selection Search ID Number Search Individual or Organization Constituent Search Name Search Prospect Search Custom searches defined by advancement officer
Passed Planned Moves Exist	

Related Forms

When the Advancement Officers option is implemented, the following forms are either used to control the display of information via the Web or control information that may be updated by the advancement officer via the Web.

Advancement Officer Search Options Form (ATVDOSR)

This form lets you specify which search options are available to advancement officers when they create custom searches on the Web. This form provides institution-level security to control the search criteria available for custom searches. The options you choose on this form are displayed on the Update a Custom Search page (bwdkrsrch.P_Build_Custom_Search) where advancement officers build their custom searches.

Advancement Officer Web Profile Items Validation Form (ATVDOWP)

This form should be reviewed by the institution before implementing the Advancement Officers option of Advancement Self-Service. The displayed information is loaded during the Banner Advancement upgrade. Records cannot be deleted from this form and new records cannot be added. This form determines which elements are available for the advancement officers to view, and the default display sequence used when building a profile preference for the advancement officer.

Gift/Payment Type Validation Form (ATVGIFT)

This form lets you specify which gift type codes are used for planned giving gifts. Advancement officers can display planned giving gifts as follows:

- With the All Planned Gifts display option on the Giving History page
- In the Planned Giving section on profile pages

Pledge Type Validation Form (ATVPLDG)

This form lets you specify which pledge type codes are used for planned giving pledges. Advancement officers can display planned giving pledges as follows:

- With the All Planned Gifts display option on the Giving History page
- In the Planned Giving section on profile pages

Enterprise Access Controls Form (GOAEACC)

For a user's list of contacts to be populated on the View Contacts page, the **ID** and **Name** fields must be populated on the Enterprise Access Controls Form (GOAEACC).

Web Pages

The following chart lists the procedures used to create the pages for the Advancement Officers functions. The packages containing the procedures are also included in the list. The format used is *package.procedure*; with the package and procedure names shown as they appear in the Uniform Resource Locator (URL).

This section provides details about the following Web pages:

- [“General Profile Preferences \(bwdkpref.P_Input_Gnrl_Pref\)” on page 116](#)
- [“Advancement Individual Profile Preferences \(bwdkpref.P_Input_Cons_Pref\)” on page 119](#)
- [“Advancement Organization Profile Preferences \(bwdkpref.P_Input_Org_Pref\)” on page 120](#)
- [“Prospect Profile Preferences \(bwdkpref.P_Input_Pros_Pref\)” on page 122](#)
- [“Manage My Prospects \(bwdkmpro.P_View_MyPros\)” on page 123](#)
- [“Update Prospect Proposals \(bwdkmppr.P_Enter_Proposal\)” on page 132](#)
- [“Add a Move \(bwdkmove.P_Add_Move\)” on page 139](#)
- [“Update a Move \(bwdkmove.P_Update_A_Move\)” on page 141](#)
- [“Current Moves \(bwdkmove.P_Current_Moves\)” on page 143](#)

- [“Move Contact Details \(bwdkmove.P_Move_Contacts\)” on page 144](#)
- [“Planned Moves by Date \(bwdkmove.P_Moves_By_Date\)” on page 146](#)
- [“Moves by Constituent \(bwdkmove.P_Moves_By_Constituent\)” on page 147](#)
- [“Moves Search \(bwdkmove.P_Search_Move\)” on page 149](#)
- [“Moves Search \(Results\) \(bwdkmove.P_Moves_Search_Results\)” on page 150](#)
- [“Passed Planned Moves Exist \(bwdkmove.P_DisplyNotify\)” on page 151](#)
- [“Passed Planned Moves \(bwdkmove.P_Passed_Planned_Moves\)” on page 151](#)
- [“Save the Move \(bwdkmove.P_Save_The_Move\)” on page 153](#)
- [“View Contacts \(bwdkpcnt.P_View_Contact\)” on page 153](#)
- [“Add a Contact \(bwdkpcnt.P_Enter_Contact\)” on page 155](#)
- [“Population Selection Search \(bwdkpsrc.P_Pop_Sel_Select\)” on page 158](#)
- [“Population Select Search Results \(bwdkpsrc.P_Pop_Sel_IDs\)” on page 159](#)
- [“Custom Search \(bwdksrch.P_Search_Select\)” on page 161](#)
- [“Search Results \(bwdksrch.P_Execute_Custom_Search\)” on page 169](#)
- [“Create a New Custom Search \(bwdksrch.P_Input_Custom_Search\)” on page 170](#)
- [“Update a Custom Search \(bwdksrch.P_Get_Custom_Search and bwdksrch.P_Build_Custom_Search\)” on page 173](#)
- [“Constituent Short Profile \(bwdkcprf.P_Short_Profile\)” on page 179](#)
- [“Constituent Long Profile \(bwdkcprf.P_Long_Profile\)” on page 186](#)
- [“Prospect Short Profile \(bwdkpprf.P_Short_Profile\)” on page 193](#)
- [“Prospect Long Profile \(bwdkpprf.P_Long_Profile\)” on page 196](#)
- [“Giving History \(bwdkghis.P_View_Gifts\)” on page 200](#)
- [“Gift Detail \(bwdkghis.P_ViewGift_Detail\)” on page 202](#)
- [“Pledge Detail \(bwdkghis.P_ViewPledge_Detail\)” on page 204](#)
- [“Alternate Names and IDs \(bwdkpsrc.P_Alternate_Names\)” on page 205](#)
- [“Save the Changes \(bwdkmove.P_Save_The_Changes\)” on page 206](#)

General Profile Preferences (bwdkpref.P_Input_Gnrl_Pref)

The General Profile Preferences page allows the user to define the overall profile settings to be applied to Web pages. These settings affect what and how the information is displayed.

Heading Information

The heading type determines how much information is displayed on the following pages:

- Constituent Short Profile (bwdkcprf.P_Short_Profile)
- Constituent Long Profile (bwdkcprf.P_Long_Profile)
- Prospect Short Profile (bwdkpprf.P_Short_Profile)
- Prospect Long Profile (bwdkpprf.P_Long_Profile)
- Giving History (bwdkghis.P_View_Gifts)
- Add a Contact (bwdkpcnt.P_Enter_Contact)
- Moves by Constituent (bwdkmove.P_Moves_By_Constituent)

If you select **ID and Name Only**, you see only the ID and name at the top of these pages.

If you select **Expanded**, the header includes additional information. For pages that pertain to advancement individuals, the following information appears in the header:

- Name
- ID
- Donor categories
- Preferred class year
- Preferred college
- Confidential indicator
- Deceased indicator
- Date of death, if known
- Prefix
- Suffix

If the advancement individual has a spouse, the header includes the same information for the spouse.

If the person is a prospect, the following information is also included:

- Prospect status
- Primary prospect manager

If the ID belongs to an advancement organization, the following information appears in the header:

- Name
- ID
- Organizational Status
- Donor categories

If the advancement organization is a prospect, the following also appears in the header:

- Prospect status
- Primary prospect manager

If the advancement organization has a parent company, the following appears in the header:

- Name
- ID
- Organizational Status
- Donor categories

If the parent company is a prospect, the following also appears in the header:

- Prospect status
- Primary prospect manager

Links to Related IDs

When you look at information on the profile pages, you can select a link to see more information about the following related IDs:

- Cross references
- Children information
- Employment history
- Secondary contacts

You can select the default page for the ID link from the **Profile ID Hot Link Default Page** pull-down list. (However, you can select a different page when you are looking at the data. A pull-down list on the profile pages allows you to select the target page you want.)

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Address Type	Hard-coded values: Preferred, Active, and All
Employment Type	Hard-coded values: Primary, Active, and All
Contact Display Months	<p>Number of months of contacts that are displayed for long and short profiles. For example, 3 means the last 3 months, and 999 means everything.</p> <p>If this field is null, then all prospect contacts for that prospect are displayed.</p>
Heading Type	Radio group that specifies whether condensed or expanded header information is displayed.
Profile ID Hot Link Default Page	Default page that is displayed if you select a related ID.
Alternate Name Type	<p>Default alternate name type you want to see when you access a constituent's long or short profile, or a prospect's long or short profile. Required.</p> <p>These profiles also include information about advancement organizations.</p> <p>Valid choices include values from the Name Type Validation Form (GTVNTYP) and All.</p> <p>If you do not select a value, all available alternate names are displayed on the profile. (To be an alternate name, the Change Type must be Name on APAIDEN.)</p>
Preferred Giving History Display	<p>Method for displaying giving history. You can show giving history as follows:</p> <ul style="list-style-type: none">• Sorted by fiscal year• Sorted by campaign and fiscal year• Sorted by designation and fiscal year• Combined giving, including giving from cross references• Displayed with gift details• Displayed with pledge details• Displayed with both gift and pledge details• Displayed as overall giving

Updates to Banner

This page updates Banner as follows.

Item	Description
Development Officer General Profile Preferences	AOBDOWP table

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Profile Preferences menu	bmenu.P_Dev_Off_Pref_Mnu

Advancement Individual Profile Preferences (bwdkpref.P_Input_Cons_Pref)

The Advancement Individual Profile Preferences page allows the user to define the profile settings to be applied when viewing the profiles of advancement individuals. These settings affect what and how the information is displayed.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Advancement Officer Web Profile Items Validation Form (ATVDOWP)	Select the Advancement Individual Profile check box for each item you want displayed on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
All items	AORDOWP table aordowp_prof_type='C'; descriptions from ATVDOWP

Updates to Banner

This page updates Banner as follows.

Item	Description
Development Officer Constituent Profile Preferences	AORDOWP table

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Profile Preferences menu	bmenu.P_Dev_Off_Pref_Mnu

Advancement Organization Profile Preferences (bwdkpref.P_Input_Org_Pref)

The Advancement Organization Profile Preferences page allows the user to define the profile settings to be applied when viewing the profiles of advancement organizations. These settings affect what and how the information is displayed.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Advancement Officer Web Profile Items Validation Form (ATVDOWP)	Select the Advancement Organization Profile check box for each item you want displayed on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
All items	AORDOWP table aordowp_prof_type='O'; descriptions from ATVDOWP

Updates to Banner

This page updates Banner as follows.

Item	Description
Development Officer Organization Profile Preferences	AORDOWP table

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Profile Preferences menu	bmenu.P_Dev_Off_Pref_Mnu

Prospect Profile Preferences (bwdkpref.P_Input_Prof_Pref)

The Prospect Profile Preferences page allows the user to define the profile settings to be applied when viewing a prospect's profile. These settings affect what and how the information is displayed,

The **Prospect Moves** setting gives the user the option to display prospect moves detail on the long and short versions of the Prospect Profile, and to indicate where the detail should be located in the display sequence.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Advancement Officer Web Profile Items Validation Form (ATVDOWP)	Select the Prospect Profile check box for each item you want displayed on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
All items	AORDOWP table aordowp_prof_type='P'; descriptions from ATVDOWP

Updates to Banner

This page updates Banner as follows.

Item	Description
Development Officer Prospect Profile Preferences	AORDOWP table

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Profile Preferences menu	bmenu.P_Dev_Off_Pref_Mnu

Manage My Prospects (bwdkmpro.P_View_MyPros)

The Manage My Prospects page provides a consolidated list of your active prospect assignments in an easy to use format. This page provides hyperlinks that allow you to quickly drill down to additional details about your prospects. This page is available by selecting the first menu option that displays on the Advancement Officers menu in Banner Advancement Self-Service.

Prospect View

The Prospect View drop-down at the top of the page allows you to control the active prospect assignments listed on the Manage My Prospects page. These assignments are defined on the Staff tab of the AMAINFO form in Banner Advancement and can be for individuals or organizations. An active assignment is one that has the Active check box checked and has Start Date and End Date values that make it effective today. If either of these conditions are not met, it is not considered an active assignment and will not display on this page.

Valid values in the Prospect View drop-down include the following:

Item	Description
Primary Only	Displays your primary active prospect assignments. This is the default value.
Other Assignments	Displays your non-primary active prospect assignments.
All	Displays both your primary and non-primary active prospect assignments.

Sort By

The Sort By drop-down allows you to choose from different sort options, depending on your needs.

Valid values in the Sort By drop-down include the following:

Item	Description
Name	Sorts the prospect list by Last Name, First Name, Middle Name, in ascending order. While the Surname Prefix and Suffix values will also display, they are not a part of the sort. This is the default value.
Status	Sorts the prospect list by the value displayed in the Status column. The sort is ascending. This sort may be helpful if you are focusing on moving prospects that are all in a particular status.
Next Open Move Date	Sorts the prospect list by the Date value in the column of the same title, in ascending order. Prospects with no value in this column will sort to the bottom of the list. This sort may be helpful for you to see upcoming moves on which you need to take action, across all of your prospects.
Preferred Location	Sorts the prospect list by Nation, State, Zip/Postal Code and City, in ascending order. This sort may be helpful if you are visiting a particular area and wanted to determine if any of your prospects are also in that area.

Request a Prospect Assignment

The Request a Prospect Assignment hyperlink allows you to send an email to a specified individual, and request being assigned to a prospect. When you click this hyperlink, your email application will open, with predetermined information in the **To** and **Subject** fields. The values that default into these fields, and the individual to which the email will be sent, are specified in the Prospect Assignment Request tab on the AGACTRL form in Banner Advancement.

Web Page Fields

This section describes the standard columns delivered for the Manage My Prospects Page. Please note that you and the institution each have some flexibility in controlling which of these columns display along with the order in which they display. The institution also has the ability to change the name of the columns. Information on these configuration options are described below.



Note: When selecting hyperlinks from the Manage My Prospects page, you can select the browser back button to navigate directly back to the Manage My Prospects page. However, when selecting a hyperlink, if you do anything more than scroll up and down on the page, the browser back arrow may need to be selected multiple times to return to the Manage My Prospects page. The other option is to select Manage My Prospects from the Advancement Officer menu.

Web page fields

This page contains the following fields.

Item	Description/source information
Name	<p>This field displays the Name of your prospect in the following format.</p> <ul style="list-style-type: none">• Individuals - Prefix + First + Middle + Surname Prefix + Last + ',' + Suffix• Organization - Organization Name <p>Selecting the Name hyperlink navigates you to the Prospect Long Profile for this prospect.</p> <p>Additionally:</p> <ul style="list-style-type: none">• If a prospect is identified as confidential, after the name there will be a dash and then the word Confidential.• If an individual prospect is deceased, the word Deceased will display after the name and the Confidential text, if applicable.• If there is a deceased date for the deceased individual, this date will also display. <p>Example: Mr. Joseph Robert Von Smith, MD – Confidential (Deceased, 10/18/1993)</p> <p>If the prospect is an organization, and the organization is inactive, the word Inactive will display next to the organization's name.</p>
Status	<p>This field displays the current prospect status, as viewable on the General Information tab of AMAINFO in Banner Advancement.</p> <p>If you are the current primary staff assigned to this prospect, the status will display as a hyperlink. When selected, it will position you on the Update Prospect Status page where you can view and make updates to the prospect's status.</p> <p>If you are not the primary active staff assigned to the prospect, this value will not be a hyperlink as you do not have access to update this prospect's status in Banner Advancement Self-Service.</p>
Lapsed Planned Moves	<p>If passed plans moves exist for the prospect, the word Yes displays as a hyperlink. The word No displays and there is no hyperlink if there are no passed planned moves.</p> <p>Selecting the Yes hyperlink navigates you to the Moves by Constituent page for the prospect. This displays the complete picture of open moves so you can view and take any appropriate action.</p>

Item	Description/source information
Next Open Move Type and Date	<p>If there is at least one open move planned for today or a future date, this field displays the Move Type description and the Planned Move Date. If there are no upcoming planned moves, nothing will display in this column for this prospect.</p> <p>If a value displays in this field, it will be a selectable hyperlink. When selected, this navigates you to the Current Moves page for the prospect. This allows you to view the upcoming moves and take the appropriate action.</p>
Event Attendance	<p>This field indicates whether there are past or future event attendance records for the prospect.</p> <p>If <code>Past</code>, <code>Future</code>, or <code>Past and Future</code> is displayed in this field, the text is a hyperlink that goes to the Event Attendance section of the Prospect Long Profile (<code>bwdkprf.P_Long_Profile</code>) page.</p> <p>Note: If your institution has chosen not to display event attendance information on the Web, these values will be displayed but will not be hyperlinks.</p>
Primary Staff Assignment	<p>If you are not the primary active staff assignment for this prospect, the First Name Middle Initial and Last Name of the active primary staff assigned to this prospect displays. This may be helpful information if you needed to speak with the primary staff regarding this prospect.</p> <p>This value will be blank If you are the primary active staff assignment.</p> <p>There is no hyperlink for this field.</p>
Assignment Type	<p>This field displays the assignment type for this staff assignment. This value is viewed on the Staff Assignments tab of the AMAINFO form in Banner Advancement.</p> <p>There is no hyperlink for this field.</p>

Item	Description/source information
Largest Recognized Gift	<p>This field displays the gift amount and date of the largest gift for which this Prospect has received some type of credit. This includes gifts made by this donor as well as gifts for which they received hard and/or soft credit.</p> <p>If there are multiple gifts that are for this same, largest amount, the most recent gift will be reflected in this column. If the gift was one for which the prospect received hard or soft credit, text will display indicating that it was either for hard or soft credit.</p> <p>If the identified Largest Recognized Gift has both hard and soft credit associated to the prospect in context, the one having the highest credit value will be the one used to determine whether (Hard) or (Soft) should display.</p> <p>Selecting the hyperlink navigates you to the Gift Detail page for the indicated gift.</p>
Largest Recognized Pledge	<p>This field displays the pledge amount and date of the largest pledge for which this Prospect has received some type of credit. This includes pledges made by this donor as well as pledges for which they received hard and/or soft credit.</p> <p>If there are multiple pledges that are for this same, largest amount, the most recent pledge will be reflected in this column. If the pledge was one for which the prospect received hard or soft credit, text will display indicating that it was either for hard or soft credit.</p> <p>If the identified Largest Recognized pledge has both hard and soft credit associated to the prospect in context, the one having the highest credit value will be the one used to determine whether (Hard) or (Soft) should display.</p> <p>Selecting the hyperlink navigates you to the Pledge Detail page for the indicated pledge.</p>
Lifetime Giving	<p>Displays the total lifetime giving for the prospect. This includes all gifts and pledge payments made in their name as well as gifts and pledge payments made by others for which the prospect received hard and or soft credit, including matching gifts and third party payments.</p>

Item	Description/source information
Spouse	<p>This field displays the name of the current spouse along with a hyperlink to the spouse's record.</p> <p>Format: Prefix + First + Middle + Surname Prefix + Last + ',' + Suffix</p> <p>If the spouse is a prospect in Banner Advancement, selecting the link will navigate you to the Prospect Long Profile for the spouse. If the spouse has a Banner ID but is not a prospect, selecting the hyperlink navigates you to the Constituent Long Profile for the spouse. If the spouse does not have a Banner ID, their name will not be a hyperlink.</p> <p>Additionally:</p> <ul style="list-style-type: none"> • If a spouse is identified as confidential, after the name there will be a dash and then the word Confidential. • If an spouse is deceased, the word Deceased will display after the name. • If there is a deceased date for the deceased spouse, this date will also display. <p>Example: Mrs. Alexandra Von Smith, MD (Deceased, 10/18/1993)</p>
Target Ask Amount	<p>This field displays the Asking Amount value from the General Information tab of AMAINFO in Banner Advancement.</p> <p>There is no hyperlink for this field.</p>
Preferred Location	<p>This field displays the City, State, Postal Code and Nation from the prospect's preferred address. All individuals should have a preferred address. Preferred addresses for organizations are optional. If no preferred organization address exists, the text 'No Preferred Address' displays.</p> <p>Example: Boston, Massachusetts 02132 United States</p>
Add a Contact	<p>The Add a Contact hyperlink displays for each prospect. If selected, you are navigated to the Add a Contact page for the prospect. If there are outstanding moves associated with the prospect, you will be asked to indicate whether or not the contact should complete a move.</p> <p>Hyperlink: See description above</p>
Add a Proposal	<p>The Add a Proposal hyperlink displays for each prospect. If you are the primary active assigned staff to a prospect, the hyperlink text Add a Proposal will display in this field. This indicates that you can add a proposal for the prospect. If you are not the primary active assigned staff for the prospect, no link will display in this field, indicating you do not have access to add a proposal for the prospect.</p> <p>If the link is selected, you will be navigated to the Prospect Proposal Create page.</p>

Item	Description/source information
Open Proposal Information	<p>If a prospect has any active* Proposals, the name of each active proposal will be displayed in the line (or lines) underneath the prospect's main record. If you would like to view or modify the Proposal and associated Projects, select the desired proposal hyperlink and you will be positioned on the Prospect Proposal Update page for the prospect and proposal in context. This means proposals that are inactive do not display on this page and you do not have access to update these proposals in Self-Service.</p> <p>*Active indicator for the proposal status code is checked.</p>

Update Prospect Status

If you are the Primary active assigned staff for a prospect, the value in the Status column is a hyperlink. When selected, you are navigated to the Update Prospect Status page. This page allows you to view the current status and status history of the prospect. You also have the ability to update the status on this page as many times as necessary.

The top section of the page provides information on the prospect and spouse, including the current prospect status. The bottom section of the page displays the Prospect Status History information. The middle portion allows you to insert a new prospect status history record. There are two required fields: Status and From Date.

Web page fields

This page contains the following fields.

Item	Description/source information
Status	The drop-down allows you to select the appropriate status for the prospect.
From Date	This is the date on which the new status became effective. Institutions have the option of defaulting today's date into this field, as can be done for the same field on the AMAINFO form in Banner Advancement. This is controlled by the 'Default current date as From Date on AMAINFO' parameter on the Miscellaneous Defaults tab of the AGACTRL form in Banner Advancement.

Item	Description/source information
Authorized By	<p>Your name will default in this field, for display purposes only. It is assumed that all status changes you are making are authorized by you.</p> <p>Once the Status and From Date fields are populated correctly, select the Update Status button. You will then see the list refreshed and see this latest status reflected in both the top and bottom portions of the page. You are free to insert another record if desired.</p> <p>The system will create the Status History record using the same logic called when this update is made in Banner Advancement through the AMAINFO form. This includes populating the From Date and To Date fields and calculating the Days value.</p> <p>To return to the Manage My Prospects page, select the Return to Manage My Prospects page. The browser back arrow is an option as well.</p>

User Configuration

You have the option of changing the display order of the columns on the Manage My Prospects page. This can be accomplished by selecting the Preferences option from the Advancement Officer menu, then selecting the Manage My Prospects Preferences link.

Web page fields

This page contains the following fields.

Item	Description/source information
Description	This field lists the various sections (headings) for the Manage My Prospects page. Display only.
Sequence Number	This field controls the display order of the columns. Sequence number 1 displays before Sequence number 2, etc. You can change the numbers to re-order the columns.
Display	This field controls whether or not this column displays on your Manage My Prospects page. If you de-select the Display indicator for a section and save your changes by selecting the Update Preferences button, those fields will no longer display on the Manage My Prospects page.
Update Preferences	Click this button when you want to save your changes.
Reset All Fields	Click this button to return the values to their last saved state. This is useful if you have started making modifications, haven't yet saved and decide you want to cancel all of the non-saved modifications.

Institutional Configuration

This section addresses the institutional configuration options for the Manage My Prospects page via the ATVDOPP form in Banner Advancement. This section is intended for those who have access to this form in Banner Advancement.

The ATVDOPP form can be accessed as follows in Banner Advancement:

1. Select the Advancement menu [*ALUMNI]
2. Select the Advancement Self-Service menu [*ALUWEB]
3. Select the Advancement Self-Service Validation menu [*ALUWVAL]
4. Select the last option on this list – Advancement Officer Web Manage My Prospects Validation Form [ATVDOPP]

The ATVDOPP form displays a record for each column supported for display on the Manage My Prospects Self-Service page. These records are stored in the ATVDOPOP table and are provided as seed data.

This form allows your institution to perform the following tasks:

- Shut-off the display of particular columns or change the display order in which these columns appear for the Advancement Officers in Self-Service. These changes must be made by the institution prior to the Advancement Officers accessing Self-Service. Once this is done, the profile, as defined at that point by the ATVDOPP form, is used to create the Manage My Prospects profile for all Advancement Officers in of Self-Service. From that point on, the Self-Service user can modify that defaulted profile in Self-Service to change the Sequence or Display values defaulted from INB to further configure which columns they do and do not want to see as well as change the display order of the columns. Changes made by the institution to the Sequence and Display fields in Banner Advancement after this point never update the Self-Service user's profile.
- Change the actual column titles of the columns on the Manage my Prospects page in Self-Service. These changes can only be done at the institution level using this form. These changes can be done at any time and will be reflected immediately in Self-Service for all Advancement Officers viewing those columns on the Manage My Prospects page.

Any changes made on this form potentially impact the Manage My Prospects self-service page for all users (per timing considerations noted above) as these change are being made at the institutional level. Therefore, the appropriate personnel should be given access to this form. The sort on this form is by sequence number, in ascending order.



Note: The Record Delete option is not allowed on this form. If a column is not needed, simply un-check the Display indicator for that column.

Disabling the Update Prospect Status page

If your institution does not want to provide access to the Update Prospect Status page in Banner Advancement Self-Service, you can disable the page through Web Tailor.

To disable the display of the page in Web Tailor:

1. Select the **Web Tailor** menu option.
2. Select the **Web Menus and Procedures** options.
3. Search for the `bwdkmpro.P_View_ProStat` procedure.
4. Select the hyperlink for the procedure name.
5. Un-check the **Enabled** check box.
6. Save your changes.

Once this procedure is followed, you will see that the status continues to display on the Manage My Prospects page, however it is no longer a hyperlink. Refer to Web Tailor documentation for additional information.

Update Prospect Proposals (`bwdkmppr.P_Enter_Proposal`)

This functionality allows Advancement Officers to maintain proposals and projects in Self-Service. The Self-Service user's relationship to the prospect, their proposals and projects dictates the level of access they have to maintaining this information. This allows Development Officers to perform more of their work in Self-Service, thereby minimizing their reliance on Banner Advancement and requiring other personnel to enter this information for them.

Add a Proposal for a Prospect

The Manage My Prospects link on the Advancement Officer menu allows you to view summary information regarding prospects to whom you are the actively assigned staff (per the AMAINFO Staff tab, the active indicator is checked, and start and end dates make this assignment effective 'today').

To add a proposal for a prospect:

1. From the Advancement Officer Menu select **Manage My Prospects**.
2. Scroll through the list and locate the Prospect to which you wish to add a Proposal.
3. Select the **Add a Proposal** hyperlink in the Add a Proposal Column for the prospect. This hyperlink only displays if you have access to add a proposal for that prospect (i.e. you are the active primary staff assigned to the prospect as of today). Otherwise, no text or hyperlink displays, indicating you do not have access to add a proposal for this prospect in Self-Service.
4. Add information in the Prospect Proposal Create page and save your changes. This function is supported for both individual and organizational prospects.

View/Modify an Existing Proposal for a Prospect

If a prospect on the Manage My Prospects page has active* proposals, the name of each active proposal displays in the line (or lines) below the prospect's main record with the label Open Proposals. The active proposal names are individual hyperlinks. To view or modify the proposal and associated projects, select the desired proposal hyperlink and the Prospect Proposal Update page for the prospect and proposal in context will display. This function is supported for both individual and organizational prospects.

*Active indicator for the proposal status code is checked.



Note: The Update Prospect Proposal function is only accessible for prospects for which you have a current active staff assignment or for which you are associated at the proposal or project level. However, the ability to perform an Advancement Officer search, find a prospect and view their Prospect Profiles is available. These profiles contain a Prospect Proposal section where this information can be viewed.



Note: Proposals that are inactive do not display on the Manage My Prospects page and the Advancement Officer does not have access to update these proposals in Self-Service.

Recommended Best Practices

The following best practices are recommended for the Prospect Proposals page:

- It is expected that anyone assigned as a staff on a proposal or a project (Additional staff tab) also has an active** staff assignment for this prospect (Staff Assignment tab on AMAINFO). It does not have to be a primary assignment. This prospect staff active assignment is required as it enables the user to view this prospect on the Manage My Prospects page. The expectation is that anyone assigned to a prospect would want to be involved in all of the proposals being presented to that prospect. Thus, the assignment should be reflected at both the prospect and proposal levels.
- It is expected that anyone identified as a Prospect Supervisor (per AGACTRL) would be making any necessary proposal and project updates in Banner Advancement, not Self-Service.

**Active check box is checked and the start and end dates make the assignment active "today".

Access Levels for Maintaining Proposals and Projects in Self-Service

The chart below summarizes the levels of access that users have to the various components that make up Proposals and Projects. The first column lists the various types of associations (roles) the self-service user can have to the prospect and/or the prospect's proposals, projects and additional staff, all of which are also maintained on the AMAPROP form in Banner Advancement.

If a self-service user has more than one of the roles listed below, they will have all of the access levels listed for all of their roles. For example, if an Advancement Officer is both the primary active staff assigned to the prospect and the staff assigned to a particular proposal for that prospect, they have the following access:

- Proposal – Insert (which includes View)
- Associated Projects – Insert and Modify
- Associated Additional Staff for those Projects – Insert and Delete

However, if the Advancement Officer is not the staff assigned to the proposal, they would be able to view everything but will only be able to insert new proposals. They would not have any other access.

Roles	Proposal	Associated Project	Associated Additional Staff
Primary active staff assigned to prospect	Insert and View	View	View
Non-primary active staff assigned to prospect	View	View	View
Staff assigned to the proposal	Modify	Insert and Modify	Insert and Delete
Primary staff assigned to the project	View	Modify	Insert and Delete
Non-primary staff assigned to the project	View	View	View

Prospect Proposal Create

This page allows you to insert a new proposal, which can contain one or more projects. Records can be insert one at a time. For each project you can identify any additional staff.

The page has three main sections:

- Advancement Individual Information header
- New Proposal
- New Project

To create a prospect proposal:

1. Enter the information for the Proposal
2. Enter the first project (if applicable) and the first Additional Staff assignment (if applicable).
3. Click Create Proposal to save these first records.

- When positioned on the Prospect Proposal Update page, a message displays at the top indicating that your Proposal information has been successfully saved. If desired, use the Prospect Proposal Update page to add any further projects or Additional Staff information for this proposal, or insert another proposal. This page is discussed more later in this document.

Advancement Individual Information Header

This is the standard section found at the top of many self-service pages about an advancement individual. It provides basic information about the person and their spouse, if applicable. This information is display only to help confirm you are positioned on the desired prospect's record.

New Proposal

The new proposal section is where you can enter the information pertaining to the proposal. The following fields appear on the page.

Item	Description/source information
Proposal	When adding a new proposal, this drop-down displays the description of the proposal codes from the Proposal Code validation table (from the ATVPROP form in Banner Advancement). Description values are sorted in ascending order. This field is protected from update once the initial record is added and saved. Required
Status	This drop-down displays valid Proposal Status codes from the ATVPRST form in Banner Advancement. This field can be modified after initial population. Since the Status code is not required, Self-Service will treat the proposal as one whose status is active if you do not select a Status code. This occurs in order to ensure the proposal displays in Self-Service if a Status is not selected. Only proposals that have an active status will display in Self-Service. If you do not want a proposal to display in Self-Service, you must explicitly select a Status value whose Active check box is not checked on ATVPRST. Optional
Status Date	This is the date on which the status was added, updated or modified. By default, the current date displays in this field when adding a new record, however this value can be overridden. There is no validation on this date other than ensuring it is a valid date. This field can be modified after initial population. Optional
Create Date	This is the date on which the proposal was created. By default, the current date displays in this field when adding a new proposal, however the date can be overridden. There is no validation on this date other than to ensure it is a valid date. This field is grayed out and cannot be modified after the initial record is saved. Required

Item	Description/source information
Due Date	This is the date on which the proposal is due. There is no default for this field and there is no validation on this field other than ensuring it is a valid date. This field can be modified after initial population. Optional
Amount	This field represents the amount of the proposal. The value entered in this field must be numeric and supports two decimals. Optional
Staff	This field indicates the name of the staff assigned to the proposal. The user name of the logged on user will automatically be added and will display in inquiry only because it is assumed the person adding the record is the person responsible for the proposal. This value cannot be modified in Self-Service. Required
Comment	This is a large text field that allows you to enter as many comments as necessary regarding the proposal. This field can be modified after initial population. Optional

New Project

The New Project section is where you can add projects that you want to associate with a newly added proposal. The following fields appear on the page.

Item	Description/source information
Project	<p>This drop-down provides a list of project/interest descriptions displayed on the ATVPROJ form in Banner Advancement. Values are sorted in ascending order. If the prospect has this project assigned to them in Banner Advancement on the AMAINFO form, an asterisk will display as the first character of the project name. This aims to help you understand which projects are associated with the prospect. Once this field is populated and the record is saved, you cannot modify the project in Self-Service. If you select and save the wrong project, you will need to coordinate with someone to correct the code in Banner Advancement.</p> <p>If you select a project that is not associated with the prospect (per AMAINFO), when you are done with data entry and select Create Proposal, the page will refresh and you will see the message 'Project not associated with the Prospect. Select the check box below to associate the project with the Prospect'. You will then see a new check box display in the Project Section to the left labeled Assign Project to Prospect. If you want this project associated with the prospect, select this check box and select Create Proposal again. If you do not want the project associated to the prospect (on AMAINFO in Banner Advancement), simply select Create Proposal again. Required</p>

Item	Description/source information
Target Ask Amount	If populated, the value entered here must be numeric with no more than two decimals. This field can be modified after initial population. Optional
Target Ask Date	This is the date on which the ask is scheduled. There is no default for this field and the only validation is to ensure the date entered is a valid date. This value can be modified after the initial entry is saved. Optional
Status	This is the status of the project. All Status values that are valid for projects display in this drop-down. Values in this drop-down sort in ascending order. This value can be modified after the initial entry is saved. Optional
Status Date	This is the date on which the status was most recently updated. By default the current date appears in this field, however, the value can be overridden. The only validation on this field is to ensure the date entered is a valid date. Optional
Giving Vehicle	This is the giving vehicle associated with the project. Values in this drop-down sort in ascending order. This field can be modified after the initial insert is saved. This value can be modified after the initial entry is saved. Optional
Effective from Date	This is the date on which the project became effective. There is no default for this field. The only validation on this field is to ensure the date entered is a valid date. This value can be modified after the initial entry is saved. Optional
Effective to Date	This is the date on which the project is no longer effective. The only validation on this field is to ensure the date entered is a valid date. This value can be modified after the initial entry is saved. Optional
Comment	This text field allows you to enter additional text that pertains to the project. This text can be modified after the initial record insert is saved. Optional
Additional Staff	This drop-down displays the names of staff assigned to the prospect (per AMAINFO in Banner Advancement) that have an active assignment (active indicator is checked and the effective dates make it effective today). The drop-down list is sorted by Last Name, First Name, Middle Name, in ascending order. This value can be modified after the initial entry is saved. Optional
Primary	This check box allows you to indicate if one of the Additional Staff is primary. There can be zero or one primary Additional Staff assignment. This value can be modified after the initial entry is saved. Optional

Prospect Proposal Update

The Prospect Proposal page appears after you add a new proposal or when you select an open proposal link on the Manage My Prospects page. This page is very similar to the Prospect Proposal Creation page except that it is used to maintain proposals, projects and additional staff.

Overview

The information below assumes you have full maintenance access for maintaining proposals and projects. If you do not, your view will be slightly different and you may not see some of the links discussed below.

When you access this page a particular proposal will be in context. Therefore, if you have access to modify the proposal information, you'll notice that these fields are immediately available for update, as appropriate.

Since there can be more than one project and you may want to either create a new project or modify an existing one, you will need to indicate the desired action by taking one of the following actions:

- Select the name of an existing project to modify the project. If you select an existing project, the data entry fields will become available for edit and you can make any appropriate modifications, including Additional Staff information.
- Click **Create a New Project** link (found in the Project section) to create a new project. If you select **Create a New Project**, a new blank project record will appear above any existing projects and you can enter the desired project information.

As noted earlier, the Create a New Proposal and Create a New Project hyperlinks only display and are active if you have access to perform these functions. Otherwise, this page will provide you with View only capabilities for the data elements for which you do not have access.

When working with this page:

- Only active proposals display on this page. Active proposals are those that have a status value with the Active indicator checked in the Prospect/Project Status Validation Code table (ATVPRST).
- Only active projects display on this page. Active projects are those that have a status value with the Active indicator checked in the Prospect/Project Status Validation Code table (ATVPRST).
- A proposal can have an unlimited number of projects but no more than four projects can be active for a proposal at any time. This same constraint is required in Self-service at this time to be consistent with Banner Advancement.
- A prospect can have multiple proposals with the same proposal code, per existing Banner Advancement standards.

Disabling the Prospect Proposal Create and Prospect Proposal Update pages

If your institution does not want to provide access to the Prospect Proposal Create or Prospect Proposal Update pages, they can be disabled through Web Tailor by modifying the following procedures:

- P_Enter_Proposal - Builds the page for both creates and updates.
- P_Insert_Proposal - The procedure that processes the Create
- P_Update_Proposal – The procedure that processes the Update

If your institution would like to disable the Prospect Proposal Creation page but have the Prospect Proposal Update page available, you should only update the P_Insert_Proposal procedure.

To disable access to a procedure in self-service:

1. Select the **Web Tailor** menu option.
2. Select the **Web Menus and Procedures** option.
3. Search for the desired procedure (listed above).
4. Select the hyperlink for the procedure name (listed above).
5. Un-check the **Enabled** indicator.
6. Save your changes.

Once this procedure is followed, you will see that there are no longer any active links to the page(s).

Add a Move (bwdkmove.P_Add_Move)

The Add a Move page allows the user to add a move to a strategy plan for a prospect. This page is only available to IDs with a Moves Manager role. Use the following steps to access the page:

1. Select the Add a Move menu link.
2. Select a **Name** or enter an **ID**.
3. Select the **Go** button or press Return. The page refreshes with the selected name/ID and the list of existing strategy assignments.

If no strategy assignments exist, the page displays the message `No Strategy Assignments exist for the selected ID`. A new **Name** or **ID** can be selected.



Note: Moves cannot be inserted without an existing assignment.

4. Select a strategy/project assignment from the pull-down list.
5. Use the fields in the lower part of the page to insert a new move record.

6. Select the **Submit Changes** or **Save and Exit** button to update the appropriate fields on AMRPLAN.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Move	Move Type Code Validation Table (ATVMOVE) pull-down menu

Web page fields

This page contains the following fields.

Item	Description/source information
Name	Prospect Pool Inquiry Form (AMAPOOL) pull-down list
ID	Advancement Prospect Information Form (AMAINFO)
Strategy/Project Assignment	Prospect Strategy Plan Form (AMAPLAN)
Strategy	Prospect Strategy Plan Form (AMAPLAN)
Project	Prospect Strategy Plan Form (AMAPLAN)
Start Date	Prospect Strategy Plan Form (AMAPLAN)
Moves Manager	Prospect Strategy Plan Form (AMAPLAN)
Move	Prospect Strategy Plan Form (AMAPLAN)
Wait Days	Prospect Strategy Plan Form (AMAPLAN)
Planned Date	Prospect Strategy Plan Form (AMAPLAN)
Contacts	Prospect Strategy Plan Form (AMAPLAN)
Move	Move Type Code Validation Table (ATVMOVE)
Comments	Prospect Strategy Plan Form (AMAPLAN)

Updates to Banner

This page updates Banner as follows.

Item	Description
Move	Updates AMRPLAN

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Move name	Goes to the Update a Move page (bwdkmove.P_Update_A_Move)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)
Contacts Exist	Goes to the Move Contact Details page (bwdkmove.P_Move_Contact_Details)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Moves Management menu	Bmenu.P_Dev_Off_Move_Mnu

Update a Move (bwdkmove.P_Update_A_Move)

The Update a Move page allows the user to update information related to a planned move or delete a Move record. The Update a Move page can be accessed from any Moves Management page where the moves detail is an active link.



Note: This page is only available to IDs with a Moves Manager role.

The top part of the page lists all existing Move records associated with a constituent's move strategy. The lower part of the page displays details for the selected move.

The page contains the following options:

- **Submit Changes** button - Saves changes on AMAPLAN, refreshes the detail displayed, and allows you to add a new move or make other changes.
- **Save and Exit** button - Saves changes and exits the page. This option returns to the menu if Add a Move was selected, or Current Moves if the update link was selected.
- **Exit without Saving Changes** button - Exits the page without saving changes or inserting new records. This option returns to the menu if Add a Move was selected, or Current Moves if the update link was selected.
- **Reset Fields** button - Resets all the details in the Move record. If you are updating, it resets the original values. If you are inserting, it clears all fields.
- **Add a Move** link - Calls the Add a Move page.

- **Delete this Move** check box – If checked when the **Submit Changes** or **Save and Exit** option is selected, removes the current Move record and returns to the calling page. This option is displayed only when the delete option is turned on via the Banner Advancement Self-Service Rules page in Banner Web Tailor, and for IDs with a Move Manager role.
- **Schedule Dates** check box – If checked when the **Submit Changes** or **Save and Exit** option is selected, reviews the wait days detail for each Move record and updates the **Planned Date** detail accordingly.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
All items	Prospect Strategy Plan Form (AMAPLAN)

Updates to Banner

This page updates Banner as follows.

Item	Description
Update	Updates AMRPLAN

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Move name	Goes to the Update a Move page (bwdkmove.P_Update_A_Move)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)
Contacts Exist	Goes to the Move Contact Details page (bwdkmove.P_Move_Contact_Details)
Add a Move	Add a Move page (bwdkmove.P_Add_Move)

Current Moves (bwdkmove.P_Current_Moves)

The Current Moves page displays all current moves for a prospect. The selected ID must be a prospect and must have a strategy.

If the ID selected is not a prospect, the page displays a message, *The selected ID is not a prospect*, and returns to the selection ID section of the page. If the ID selected is a prospect but doesn't have a plan, the page displays a message, *No Strategy Assignments exist for the selected ID*, and returns to the selection ID section of the page.

The **Move** field links to the Move record. This link is only active if the advancement officer has the Moves Manager role assigned in Banner Web Tailor. Select this link to open the Update a Move page. The detail of the selected move is returned in edit mode. The user can then make needed changes and save. This updates the appropriate fields on AMRPLAN.

Two **Contacts** options are available from this page:

- If a contact is associated with the Move record, the **Contacts** link displays Contacts exist. Select this link to open the Move Contacts Details page. This page displays details for the move and related contact details.
- If a contact is not associated with the Move record, the **Contacts** link displays Add a Contact. Select this link to open the Add a Contact page. The Move record details default as appropriate and the user can add and save the related contact details. Completing this action updates the move as complete and changes the link to Contacts exist. The Add a Contact link is only active if the advancement officer has the Moves Manager role assigned in Banner Web Tailor.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Name	Prospect Pool Inquiry Form (AMAPOOL) pull-down list
ID	Advancement Prospect Information Form (AMAINFO)
Strategy	Prospect Strategy Plan Form (AMAPLAN)
Project	Prospect Strategy Plan Form (AMAPLAN)
Start Date	Prospect Strategy Plan Form (AMAPLAN)
Moves Manager	Prospect Strategy Plan Form (AMAPLAN)
Move	Prospect Strategy Plan Form (AMAPLAN)

Item	Description/source information
Wait Days	Prospect Strategy Plan Form (AMAPLAN)
Planned Date	Prospect Strategy Plan Form (AMAPLAN)
Contacts	Prospect Contact Form (AMACONT)
Comments	Prospect Strategy Plan Form (AMAPLAN)

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Move name	Goes to the Update a Move page (bwdkmove.P_Update_A_Move)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)
Contacts Exist	Goes to the Move Contact Details page (bwdkmove.P_Move_Contact_Details)
Add a Move	Add a Move page (bwdkmove.P_Add_Move)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Moves Management menu	Bmenu.P_Dev_Off_Move_Mnu

Move Contact Details (bwdkmove.P_Move_Contacts)

The Move Contact Details page displays basic move information and contact details associated with the move. The Prospect Profile displays contact records based on the settings on the Advancement Self-Service Rules in Banner Web Tailor.

Several Moves Management pages display the Contacts exist link. Select this link to open the Move Contact Details page.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description

Web page fields

This page contains the following fields.

Item	Description/source information
Move	Prospect Strategy Plan Form (AMAPLAN)
Planned Date	Prospect Strategy Plan Form (AMAPLAN)
Strategy	Prospect Strategy Plan Form (AMAPLAN)
Project	Prospect Strategy Plan Form (AMAPLAN)
Moves Manager	Prospect Strategy Plan Form (AMAPLAN)
Contact	Prospect Contacts Form (AMACONT)
Contact Date	Prospect Contacts Form (AMACONT)
Project	Prospect Contacts Form (AMACONT)
Ask Amount	Prospect Contacts Form (AMACONT)
Originator	Prospect Contacts Form (AMACONT)
Description	Prospect Contacts Form (AMACONT)
Call Report	Prospect Contacts Form (AMACONT)
Action Date	Prospect Contacts Form (AMACONT)
Assignee	Prospect Contacts Form (AMACONT)
Action	Prospect Contacts Form (AMACONT)

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Move name	Goes to the Update a Move page (bwdkmove.P_Update_A_Move)

Planned Moves by Date (bwdkmove.P_Moves_By_Date)

The Planned Moves by Date page displays moves for the advancement officer to perform for a selected date. If no moves exist for the date, the following message is displayed: *No Moves for the Date selected*. Links are provided to select the next day or previous day.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Select a Date	Enter a date in format described.
Name	Prospect Pool Inquiry Form (AMAPOOL)
Move	Prospect Strategy Plan Form (AMAPLAN)
Strategy	Prospect Strategy Plan Form (AMAPLAN)
Project	Prospect Strategy Plan Form (AMAPLAN)
Contacts	Prospect Contacts Form (AMACONT)

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Name	Goes to the Prospect Short Profile page (bwdkpprf.P_Short_Profile)
Move name	Goes to the Update a Move page (bwdkmove.P_Update_A_Move)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Moves Management menu	Bmenu.P_Dev_Off_Move_Mnu

Moves by Constituent (bwdkmove.P_Moves_By_Constituent)

The Moves by Constituent page displays all moves and associated contacts and/or unplanned contacts for a specific advancement individual or advancement organization. The page includes anything recorded, regardless of interest, campaign, or person responsible for completing the move. If no moves exist for the selected ID, the page displays the following message: *No Moves for the ID selected.*

A General Profile Preferences setting determines how much information is displayed in the header of the Moves by Constituent page. You can display the ID and name only, or you can display expanded header information.

Moves can be sorted by:

- Strategy (alphabetical)
- Project (alphabetical)
- Start date (default; newest to oldest)
- Moves manager (by moves manager)

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Name	Prospect Pool Inquiry Form (AMAPOOL) pull-down list
ID	Advancement Prospect Information Form (AMAINFO)
Sort By	Strategy Project Start Date Moves Manager
Strategy	Prospect Strategy Plan Form (AMAPLAN)
Project	Prospect Strategy Plan Form (AMAPLAN)
Start Date	Prospect Strategy Plan Form (AMAPLAN)
Moves Manager	Prospect Strategy Plan Form (AMAPLAN)
Move	Prospect Strategy Plan Form (AMAPLAN)
Wait Days	Prospect Strategy Plan Form (AMAPLAN)
Planned Date	Prospect Strategy Plan Form (AMAPLAN)
Contacts	Prospect Contact Form (AMACONT)
Comments	Prospect Strategy Plan Form (AMAPLAN)

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Move name	Goes to the Update a Move page (bwdkmove.P_Update_A_Move)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)

Link	Action
Contacts Exist	Goes to the Move Contact Details page (bwdkmove.P_Move_Contact_Details)
Add a Move	Add a Move page (bwdkmove.P_Add_Move)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Moves Management menu	Bmenu.P_Dev_Off_Move_Mnu

Moves Search (bwdkmove.P_Search_Move)

The Moves Search page collects the parameters necessary to search for a set of moves. The query can be sorted by constituent, date, project, or geographic region. If no moves exist for the date range selected, the page displays the message: *No Moves for the date range selected.*

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
From	Starting date for search range. The current date is the default.
To	Ending date for search range. The current date is the default.
Sort By	Constituent Name Planned Date Project Preferred Geographic Region

Updates to Banner

This page does not update information in the Banner database.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Moves Management menu	Bmenu.P_Dev_Off_Move_Mnu

Moves Search (Results) (bwdkmove.P_Moves_Search_Results)

The Moves Search Results page displays the moves found for the parameters entered on the Moves Search page.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Move	Prospect Strategy Plan Form (AMAPLAN)
Strategy	Prospect Strategy Plan Form (AMAPLAN)
Project	Prospect Strategy Plan Form (AMAPLAN)
Contacts	Prospect Contacts Form (AMACONT)
Wait Days	Prospect Strategy Plan Form (AMAPLAN)
Planned Date	Prospect Strategy Plan Form (AMAPLAN)
Comments	Prospect Strategy Plan Form (AMAPLAN)
Preferred Geographic Regions	Geographic Regions by ID Form (SOAIGEO)

Updates to Banner

This page does not update information in the Banner database.

Passed Planned Moves Exist (bwdkmove.P_DispNetify)

The Passed Planned Moves Exist message is displayed on self-service menus to indicate that passed planned moves for a specific advancement officer (based on login ID) exist. These moves have a planned date before the current date are not yet marked as completed.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Passed Planned Moves (bwdkmove.P_Passed_Planned_Moves)

The Passed Planned Moves page lists all moves that have planned dates earlier than the current date and do not have contacts indicating the move is complete. The moves are sorted from oldest passed date to newest passed date. The user can update the move, cancel the move, or go to the Add a Contact page to mark the move complete.

Updating a Move

1. Select the **Move** name to display the Update a Move page.
2. Update the move data (**Wait Days**, **Planned Date**, and/or **Comment**).
3. Select the **Submit Changes** button.

Canceling a Move

1. Select the **Move** name to display the Update a Move page.
2. Select the **Delete this Move** check box.
3. Select the **Submit Changes** button.

Marking a Move Complete

1. Select the **Move** name to display the Update a Move page.
2. Select the Add a Contact link for the selected move. The Add a Contact page is displayed.
3. Select **Complete** in the **Action Status** check box.
4. Select the **Submit Contact** button.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Planned Date	Prospect Strategy Plan Form (AMAPLAN)
Name	Advancement Identification Form (APAIDEN)
Move	Prospect Strategy Plan Form (AMAPLAN)
Strategy	Prospect Strategy Plan Form (AMAPLAN)
Project	Prospect Strategy Plan Form (AMAPLAN)

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Move name	Goes to the Update a Move page (bwdkmove.P_Update_A_Move)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)

Save the Move (bwdkmove.P_Save_The_Move)

The Save the Move page confirms the move updates were saved.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page updates Banner as follows.

Item	Description
Move	Updates AMRPLAN

View Contacts (bwdkpcnt.P_View_Contact)

The View Contacts page displays all existing contact records for a selected **Name** or **ID**. The pull-down list of assigned prospect names is based on the login ID of the user.



Note: If the **ID** and **Name** fields are blank on the Enterprise Access Controls Form (GOAEACC), then the drop-down list for the contacts is blank for that user.

Contact records are displayed in contact date order, from newest to oldest. Move information is displayed, if it exists. If no contacts exist for the ID, the following message is displayed: *No contact records exist for the ID.*

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Name	Prospect Pool Inquiry Form (AMAPOOL)
ID	Advancement Identification Form (APAIDEN)
Contact	Prospect Contacts Form (AMACONT)
Contact Date	Prospect Contacts Form (AMACONT)
Project	Prospect Contacts Form (AMACONT)
Ask Amount	Prospect Contacts Form (AMACONT)
Originator	Prospect Contacts Form (AMACONT)
Description	Prospect Contacts Form (AMACONT)
Call Report	Prospect Contacts Form (AMACONT)
Action Date	Prospect Contacts Form (AMACONT)
Assignee	Prospect Contacts Form (AMACONT)
Action	Prospect Contacts Form (AMACONT)

Updates to Banner

This page does not update information in the Banner database.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Advancement Officers menu	bmenu.P_Dev_Off_Mnu

Add a Contact (bwdkpcnt.P_Enter_Contact)

The Add a Contact page allows an advancement officer to enter a contact. This page can be accessed directly from the Advancement Officers menu or from links on several search results and Moves Management pages. There are three types of contacts:

- A **general contact** can be associated with a prospect or nonprospect.
- A **proposal contact** is associated with a specific proposal for a prospect.
- A **non-proposal contact** is associated with a prospect but not with a specific proposal.

A General Profile Preferences setting determines how much information is displayed in the header of the Add a Contact page. You can display the ID and name only, or you can display expanded header information.



Note: When an officer clicks **Add a Contact** and subsequently completes entry of the contact information, the officer will be positioned back on the page where they selected **Add a Contact**.

Adding a Contact for a Constituent With Prospects

1. Select the **Add a Contact** link on the Advancement Officers menu, search results page, or Moves Management page. The Add a Contact page is displayed.
2. Select a **Name**, or enter an **ID**.
3. Select the **Go** button or press Return. If the constituent has prospects, the page is redisplayed with three radio buttons for selecting the type of contact to be added.
4. Select a radio button (**General Contact**, **Proposal Contact**, or **Non-Proposal Contact**).
5. Select the **Go** button.
6. To enter a general contact:
 - 6.1. Enter contact information. The **Originator**, **Contact Date**, **Contact Type**, and **Contact Description** are required.
 - 6.2. Select the **Submit Contact** button.
7. To enter a proposal contact:
 - 7.1. Select a **Proposal** from the pull-down list. (A sequence number distinguishes multiple proposals with the same proposal code.)
 - 7.2. Select the **Go** button.
 - 7.3. Enter contact information. The **Originator**, **Contact Date**, **Project 1**, **Contact Type**, and **Contact Description** are required.
 - 7.4. Select the **Submit Contact** button.

8. To enter a non-proposal contact:
 - 8.1. Enter contact information. The **Originator**, **Contact Date**, **Project 1**, **Contact Type**, and **Contact Description** are required.
 - 8.2. Select the **Submit Contact** button.

Adding a Contact for a Constituent With No Prospects

1. Select the Add a Contact link on the Advancement Officers menu, search results page, or Moves Management page. The Add a Contact page is displayed.
2. Select a **Name**, or enter an **ID**.
3. Select the **Go** button or press Return. If the constituent has no prospects, the page is redisplayed with general contact details for data entry.
4. Enter general contact information. The **Originator**, **Contact Date**, **Contact Type**, and **Contact Description** are required.
5. Select the **Submit Contact** button.

General contacts can be viewed on the Contact Form (APACONT). Both prospect and general contacts can be viewed on the Prospect Contacts Form (AMACONT).

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Solicitor Contact Code Validation Form (ATVSCNT)	Select the Web Indicator check box for each contact type code you want to be available on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
Name	Prospect Pool Inquiry Form (AMAPOOL)
ID	Advancement Identification Form (APAIDEN)
Originator	User Identification Control Form (GUAIDEN) pull-down list. The default value is the user ID of the person adding the contact.
Proposal	Prospect Proposal Form (AMAPROP) pull-down menu
Contact Date	Specified date when contact was made

Item	Description/source information
Project 1-4	Project/Interest Code Validation Form (ATVPROJ) pull-down list
Ask Amount	Specifies amount solicited
Contact Type	Solicitor Contact Code Validation Form (ATVSCNT) pull-down list
Contact Description	Describes the contact
Call Report	Specifies additional contact details
Move Code	Move Type Code Validation Form (ATVMOVE) pull-down list
Assignee	User Identification Control Form (GUAIDEN) pull-down list. The default value is the user ID of the person adding the contact.
Action	Describes action taken
Action Date	Specifies date action was taken
Confidential	If checked, indicates the contact is confidential.
Action Status	Select Complete Hold Pending

Updates to Banner

This page updates Banner as follows.

Item	Description
Contact/Action	Updates AMRPRIN and AMRCONT
General Messages	Updates GURTKLR

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Advancement Officers menu	bmenu.P_Dev_Off_Mnu
Moves Management menu	P_Dev_Off_Move_Mnu

Population Selection Search (bwdkpsrc.P_Pop_Sel_Select)

The Population Selection Search page allows the user to search for the results of an existing Banner population selection record. The values entered in this search must be an exact match for results to be displayed.

If the displayed record has moves detail, you can view it by selecting the Moves link to open the Moves by Constituent page (bwdkmove.P_Moves_By_Constituent). The ID from the search results list where the link was selected is carried forward.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Application	Population Selection Extract Inquiry (GLIEXTR)
Selection ID	Population Selection Extract Inquiry (GLIEXTR)
Creator	Population Selection Extract Inquiry (GLIEXTR)
User	Population Selection Extract Inquiry (GLIEXTR)
Records to Include	People Organizations
Records per page	1, 2, 3, 4, 5, 6,7 8, 9, 10

Updates to Banner

This page updates Banner as follows.

Item	Description
Move	Updates AOBSTMP

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Start Another Search	Goes to the Advancement Officer Searches menu (bwdksrch.P_Display_Custom_Searchs)

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Advancement Officers Search	bwdksrch.P_Display_Custom_Searches

Population Select Search Results (bwdkpsrc.P_Pop_Sel_IDs)

The Population Selection Search Results page displays details for the records included in the population selection entered. Also included are active links to existing information for the associated record.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
<i>The following fields are displayed for an advancement individual contact:</i>	
ID	Advancement Identification Form (APAIDEN)
Name	Advancement Identification Form (APAIDEN)
Class	Advancement Individual Information Form (APACONS)
Category	Advancement Individual Information Form (APACONS)
College	Advancement Individual Information Form (APACONS)

Item	Description/source information
Confidential	Advancement Identification Form (APAIDEN)
Deceased	Advancement Identification Form (APAIDEN)
<i>The following fields are displayed for an advancement individual contact's spouse:</i>	
ID	Advancement Individual Information Form (APACONS)
Name	Advancement Individual Information Form (APACONS)
Class	Advancement Individual Information Form (APACONS)
Category	Advancement Individual Information Form (APACONS)
College	Advancement Individual Information Form (APACONS)
Confidential	Advancement Identification Form (APAIDEN)
Deceased	Advancement Identification Form (APAIDEN)
<i>The following fields are displayed for an advancement organization contact:</i>	
ID	Advancement Identification Form (APAIDEN)
Name	Advancement Identification Form (APAIDEN)
Class	NA
Category	Advancement Organization Header Form (AOAORGN)
College	NA
Confidential	NA
Deceased	NA
<i>The following fields are displayed for an advancement organization contact's parent company:</i>	
ID	Advancement Organization Header Form (AOAORGN)
Name	Advancement Organization Header Form (AOAORGN)
Class	NA
Category	Advancement Organization Header Form (AOAORGN)
College	NA
Confidential	NA
Deceased	NA

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Short Constituent	Goes to the Constituent Short Profile page (bwdkcprf.P_Short_Profile)
Long Constituent	Goes to the Constituent Long Profile page (bwdkcprf.P_Long_Profile)
Short Prospect	Goes to the Prospect Short Profile page (bwdkpprf.P_Short_Profile)
Long Prospect	Goes to the Prospect Long Profile page (bwdkcprf.P_Long_Profile)
Alternate_Names/IDs	Goes to the Alternate Names and IDs page (bwdkpsrc.P_Alternate_Names)
Giving History	Goes to the Giving History page (bwdkghis.P_View_Gifts)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)
Moves Detail	Goes to the Moves by Constituent page (bwdkmove.P_Moves_By_Constituent)

Custom Search (bwdksrch.P_Search_Select)

The Custom Search page allows a user to search for existing Banner records based on several search options. Banner Advancement Self-Service is delivered with four searches. The delivered searches can be modified. In addition, advancement officers can create their own custom searches.

The same package (bwdksrch.P_Search_Select) is used to display all of the pages for entering search criteria. The package dynamically displays the page title and relevant items for the requested search. For example, for an ID number search, only the **Identification Number search criteria** is displayed, whereas for an individual or organization constituent search, all search criteria items are displayed. Similarly, for a custom search, those search criteria specified by the user are displayed in the order defined by the user.

Advancement officers can search for all advancement individuals and advancement organizations that have a specific institution code (in addition to other search options). A “home institution” can be defined to include multiple institution codes. To do this, you must add a record to GTVSDAX for each institution you want to include in the “home institution.” [“Home Institution” on page 21](#) for more details on using a “home institution.”

Delivered Searches

The following predefined searches are delivered in Banner Advancement Self-Service. You can modify the delivered searches.

Delivered Search Title	Search Fields Included
ID Number Search	Identification Number
Individual or Organization Constituent Search	All search fields
Name Search	Sounds Like Name Search First Name Middle Name Last Name Prefix Last Name
Prospect Search	Geographic Region Geographic Region Division Prospect Status Prospect Rating Project or Interest Staff ID Number Staff Identification Code

Custom Searches

An advancement officer can define custom searches that include any of the search criteria on the Individual or Organization Constituent Search page. The advancement officer can create a title for each custom search. This title is displayed on his/her Advancement Officers Searches menu. For example, if you create a custom search called “Class Year and Giving,” that title is displayed on the menu. Custom searches are not displayed on other users’ menus.

Household Giving History

An advancement officer can search for donors whose credit falls within a certain range. Depending on settings in Banner Web Tailor, the search can be performed for the donor’s credit or for the combined total of the donor’s credit and the spouse’s credit. To improve performance, household (donor plus spouse) totals are calculated in advance and stored in the AGTOGIV temporary table. It is recommended that you run the p_process_gift_data procedure daily to calculate the giving totals and store them in AGTOGIV.

Performing a Custom Search

1. Access the Secure Area and navigate to the Advancement Officers menu (twbkwbis.P_GenMenu).
2. Select the Advancement Officer Searches link.

The Advancement Officer Searches menu (bwdksrch.P_Display_Custom_Searchs) is displayed.

3. Select the search you want to perform from the menu.



Note: An advancement officer can see only the delivered searches and the ones he/she created.

4. Enter desired values for the search criteria.

All the search criteria fields are optional. To select several contiguous items, select the first one, hold down the Shift key, and then select the last one. To select multiple, non-contiguous items, select the first one, hold down the Ctrl key, and then select each desired item. Both methods can be used in the same pull-down menu.

5. Select the **Go Find It** button. Records that meet the search criteria are displayed on the Search Results page (bwdksrch.P_Execute_Custom_Search).

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Depending on the specific search being performed, the Custom Search page displays fields from the following list. The actual sequence of the fields depends on the order defined when the advancement officer created the custom search.	
Sounds Like Name Search	Check box that specifies whether you want to perform a Soundex search. If checked, the search returns all names that resemble or sound like the query entered. If cleared, the search only returns names that match exactly.
First Name	First name of the advancement individual you want to find.
Middle Name	Middle name of the advancement individual you want to find.
Last Name Prefix	Last name prefix of the advancement individual you want to find.
Last Name	Last name of the advancement individual or full name of the advancement organization.

Item	Description/source information
State	State(s) to include in the search criteria. The values displayed in the pull-down list are <i>All States</i> and the states defined on the State/Province Code Validation Form (STVSTAT).
ZIP or Postal Code From	First ZIP or postal code in the range to be searched.
ZIP or Postal Code To	Last ZIP or postal code in the range to be searched.
Nation	Nation(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Nations</i> and the nations defined on the Nation Code Validation Form (STVNATN).
Geographic Region	Geographic region(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Regions</i> and the regions defined on the Geographic Region Rules Form (SOAGEOR).
Geographic Region Division	Geographic region division(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Region Divisions</i> and the region division defined on the Geographic Region Rules Form (SOAGEOR) and the Geographic Region Division Validation Form (STVGEOD).
Degree Year, College, and Major	<p>Combinations of a specific degree year, college, and major. You can search for up to three different combinations.</p> <p>Valid values displayed in the pull-down lists are:</p> <ul style="list-style-type: none"> • For Degree Year, <i>All Years</i> and the years defined on the Academic Year Validation Form (STVACYR) • For College, <i>All Colleges</i> and the colleges defined on the College Code Validation Form (STVCOLL) • For Major, <i>All Majors</i> and the majors defined on the Major, Minor, Concentration Code Validation Form (STVMAJR)
Degree Institution	<p>Institution(s) to include in the search criteria. Valid values displayed in the pull-down list are:</p> <ul style="list-style-type: none"> • <i>All Institutions</i> • If applicable, the title that identifies the “home institution” that includes multiple institution codes. Rules on the Crosswalk Validation Form (GTVSDAX) identify the institutions that are part of the “home institution.” See “Home Institution” on page 21 for more information. • The institutions defined on the Source/Background Institution Code Validation Form (STVSBGI) for which the Type is C.
Preferred Class Year	Preferred class year(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Years</i> and the years listed on the APBCONS table.
Preferred College	Preferred college(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Colleges</i> and the values for the Colleges field on the APACONS table. (These values come from the STVCOLL table.)

Item	Description/source information
Donor Category	Donor category(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Categories</i> and the categories defined on the Donor Category Code Validation Form (ATVDONR).
Job Category	Job category(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Categories</i> and the categories defined on the Job Category Code Validation Form (ATVJOBC).
Income Code	Income code(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Income Codes</i> and the codes defined on the Income Code Validation Form (ATVINCM).
Last Process Run Date (untitled)	Message indicating the last run date of the agkgrpt.p_process_gift_data process, which populates the Combined Lifetime Giving for a Spouse Pair Table (AGTOGIV) containing the details that are stored by the process. This indicates how current the data is that will be searched.
Donor (and Spouse) Hard Credit From / To	<p>Low and high monetary amounts (in whole values) for the hard credit range on which you want to search. This option allows you to search for people and organizations whose hard credit giving fits within a range of amounts.</p> <p>A rule on the Advancement Self-Service Rules page (bwakwrul.P_ModifyPgWebRules) specifies whether spouse records are included in the calculation:</p> <ul style="list-style-type: none"> • If spouse records are included, the label of this field is Donor and Spouse Hard Credit. Banner Advancement Self-Service includes hard credit for both the donor and spouse when searching. • If spouse records are not included, the label of this field is Donor Hard Credit. Banner Advancement Self-Service includes hard credit for the donor only when searching. <p>When the system searches for matching records, it includes any soft credit in the calculations to determine who meets the search criteria.</p>

Item	Description/source information
Donor (and Spouse) Soft Credit From / To	<p>Low and high monetary amounts (in whole values) for the soft credit range on which you want to search. This option allows you to search for people and organizations whose soft credit giving fits within a range of amounts.</p> <p>A rule on the Advancement Self-Service Rules page (bwakwrul.P_ModifyPgWebRules) specifies whether spouse records are included in the calculation:</p> <ul style="list-style-type: none"> • If spouse records are included, the label of this field is Donor and Spouse Soft Credit. Banner Advancement Self-Service includes soft credit for both the donor and spouse when searching. • If spouse records are not included, the label of this field is Donor Soft Credit. Banner Advancement Self-Service includes soft credit for the donor only when searching. <p>When the system searches for matching records, it includes any gifts, pledge payments, soft credit ID, or hard credit in the calculations to determine who meets the search criteria.</p>
Donor (and Spouse) Overall Credit From / To	<p>Low and high monetary amounts (in whole values) for the overall credit range on which you want to search. This option allows you to search for people and organizations whose overall credit giving fits within a range of amounts.</p> <p>A rule on the Advancement Self-Service Rules page (bwakwrul.P_ModifyPgWebRules) specifies whether spouse records are included in the calculation:</p> <ul style="list-style-type: none"> • If spouse records are included, the label of this field is Donor and Spouse Overall Credit. Banner Advancement Self-Service includes overall credit for both the donor and spouse when searching. • If spouse records are not included, the label of this field is Donor Overall Credit. Banner Advancement Self-Service includes overall credit for the donor only when searching. <p>When the system searches for matching records, it includes any gifts, pledge payments, or hard credit in the calculations to determine who meets the search criteria.</p>
Activity Type and Category	<p>Activity type and category combinations to include in the search criteria. You can select up to three different combinations.</p> <p>The individuals and organizations found by the search have the selected combinations on the Activities Form (APAACTY).</p> <p>Valid values displayed in the pull-down list are:</p> <ul style="list-style-type: none"> • For Activity Type, <i>All Types</i> and the activity types defined on the Activity Type Validation Form (STVACTP) • For Activity Category, <i>All Activities</i> and the activity categories defined on the Student Activity Code Validation Form (STVACTC)

Item	Description/source information
Activity Code	Activity code(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Activities</i> and the activity codes defined on the Student Activity Code Validation Form (STVACTC).
Variable Purpose Code	Variable purpose code(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Variable Purposes</i> and the codes defined on the Variable Purpose Validation Form (ATVVIPC).
Special Purpose Type and Code	Combinations of special purpose type and special purpose code to include in the search criteria. The values displayed in the pull-down lists are <i>All Special Types</i> and codes defined on the Special Purpose Type Validation Form (ATVPRTP) and Special Purpose Code Validation Form (ATVPRCD).
Prospect Status	Prospect status(es) to include in the search criteria. The values displayed in the pull-down list are <i>All Statuses</i> and the statuses defined on the Prospect Status Validation Form (ATVPRST).
Prospect Rating	Prospect rating(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Ratings</i> and the ratings defined on the Prospect Rating Code Validation Form (ATVRATE).
Project or Interest	Project(s) or interest(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Projects</i> and the ratings defined on the Project/Interest Code Validation Form (ATVPROJ).
Staff ID Number	Staff member name where the prospect staff assignment has been made using the staff Banner ID to include in the search criteria. The values displayed in the pull-down list are <i>All Staff</i> and the staff in the AMRSTAF table (AMRSTAF_STAFF_PIDM).
Staff Identification Code	Staff member name where the prospect staff assignment has been made using the staff initials to include in the search criteria. The values displayed in the pull-down list are <i>All Staff</i> and the staff in the AMRSTAF table (AMRSTAF_IDEN_CODE).
Membership Code	Membership(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Memberships</i> and the values set up in the AABMSHP table (AABMSHP_MEMBERSHIP).
Membership Type	Membership type(s) to include in the search criteria. The values displayed in the pull-down list are <i>All Types</i> and the values set up in the ATVAMTP table.
Organizational Status	Status of the organizational records to include in the search. <i>All Statuses, Active, or Inactive.</i>

Item	Description/source information
Records to Include	Type of records to include in the search: All, People, or Organizations.
Number of records per page	Number of records to be displayed on a page in the search results. Valid values are 1 to 99.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Start Another Search	Goes to the Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searchs)

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Go Find It!	Goes to the Search Results page (bwdksrch.P_Execute_Custom_Search)
Reset All Fields	Redisplays the page with default settings.

Web menus with links to this page

The following menus contain links to this page.

Menu name	Menu URL
Advancement Officers Searches	bwdksrch.P_Display_Custom_Searchs

Search Results (bwdksrch.P_Execute_Custom_Search)

The Search Results page displays the results of a custom search (but not a Population Selection Search).

The title of this page is dynamic, displaying the title of the selected search followed by the word "Results." For example, if you perform an ID number search, the page title is *ID Number Search Results*; if you perform a custom search titled "Class Year and Giving", the page title is *Class Year and Giving Results*.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
	The following fields are displayed in the Contact column. Depending on whether the constituent is an individual or organization, the fields are also displayed in the Spouse/Parent Company column.
ID	ID of the individual or organization. The value comes from the Advancement Identification Form (APAIDEN).
Name	Name of the individual or organization. The name includes the prefix and/or suffix, if one exists. The value comes from the Advancement Identification Form (APAIDEN).
Class	Preferred class of the individual. The value comes from the Advancement Individual Information Form (APACONS)
Category	Category of the individual. The value comes from the Advancement Individual Information Form (APACONS).
College	Name of the preferred college associated with the individual. The value comes from the Advancement Individual Information Form (APACONS).
Confidential	Indicates whether the record is confidential. The value comes from the Advancement Identification Form (APAIDEN).
Deceased	Indicates whether the individual is deceased. This field does not display for organizations. For organizations, the organizational status field displays. The value comes from the Advancement Identification Form (APAIDEN)
Organizational Status	Indicates whether the organization is active or inactive. For individuals, the deceased field displays. The value comes from the Advancement Identification Form (APAIDEN).

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Short Constituent	Goes to the Constituent Short Profile page (bwdkcprf.P_Short_Profile)
Long Constituent	Goes to the Constituent Long Profile page (bwdkcprf.P_Long_Profile)
Short Prospect	Goes to the Prospect Short Profile page (bwdkpprf.P_Short_Profile)
Long Prospect	Goes to the Prospect Long Profile page (bwdkcprf.P_Long_Profile)
Alternate_Names/IDs	Goes to the Alternate Names and IDs page (bwdkpsrc.P_Alternate_Names)
Giving History	Goes to the Giving History page (bwdkghis.P_View_Gifts)
Add a Contact	Goes to the Add a Contact page (bwdkpcent.P_Enter_Contact)
Moves Detail	Goes to the Moves by Constituent page (bwdkmove.P_Moves_By_Constituent)
New Search	Returns to the search page you used to access this page

Create a New Custom Search (bwdksrch.P_Input_Custom_Search)

The Create a New Custom Search page is used to create a new custom search. Once the search header is created on this page and details are defined on the Update a Custom Search page (bwdksrch.P_Get_Custom_Search), the Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches) displays a link to the search. An advancement officer can have any number of custom, personalized searches.

Creating a Custom Search

1. Access the Secure Area and navigate to the Advancement Officers menu (twbkwbis.P_GenMenu).
2. Select the Advancement Officer Searches link. The Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches) is displayed.

3. Select the **Create a New Custom Search** button. The Create a New Custom Search page (bwdksrch.P_Input_Custom_Search) is displayed.

The system creates a custom search with all the defaults defined by your institution and automatically displays the details.

4. Enter header information that defines your custom search:
 - 4.1. In **Custom Search Name**, enter a unique name for your search.
 - 4.2. In **Custom Search Title**, enter the title of the search that will appear on the Advancement Officers Searches menu as a link to the search.
 - 4.3. If you want to display the search on the menu, select the **Display search on menu** check box. If you want to create it now and display it later, clear the check box. Your custom search will not be visible until this check box is selected.
 - 4.4. If you want to search for prospects only, select the **Limit search to Prospect records only** check box. If you want to find both prospect and general records, clear the check box.
 - 4.5. If you want your search to find only advancement individuals, select `People` from the **Records to Include** pull-down menu. If you want it to find only advancement organizations, select `Organizations`. If you want it to find all records, select `All`.
 - 4.6. Select the number of records you want to see on a page from the **Number of records per page** pull-down list.

5. Select the **Save Header Information** button. The Update a Custom Search page (bwdksrch.P_Build_Custom_Search) is displayed so you can define the search criteria for your custom search. The Search Header Information section contains the information from the previous page, but you can change it. You can also select a different search to change from the first pull-down list.

6. In the Detail Search Options section, review the possible search criteria items that are listed (**Identification Number**, **Name**, **Donor Category**, and so on). All are included in your custom search by default. You must clear the **Include** check box for each item you do not want to appear in your search.

For example, if you want to search for people in a specific geographic region but you do not want to search for people by income code, make sure the **Include** check box is selected for **Geographic Region** and cleared for **Income Code**.

7. Review the sequence in which the items are listed. If you want them to appear in a different order when your search results are displayed, change the number in the **Sequence** field.

For example, if you want **Preferred Class Year** to be at the top of your search results, change the value in the **Sequence** field to 1.

8. Select the **Update Options** button to save your changes.

The Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches) now includes the new search. When selected, it displays the chosen search criteria in the order you specified.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
Custom Search Name	Name of the custom search. This name is displayed in the pull-down list on the Update a Custom Search page (bwdksrch.P_Get_Custom_Search). Once defined and saved, this name cannot be changed. Required.
Custom Search Title	Title of the custom search, up to 60 characters. This title is displayed in the list of available custom searches on the Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches) and as the dynamic title on the Search Results page (bwdksrch.P_Execute_Custom_Search). Required. Searches are displayed on the Advancement Officers Searches menu alphabetically by custom search title (after the Population Selection search).
Display search on menu	Check box used to specify whether the title should appear on the Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches).
Limit search to Prospect records only	Check box used to specify whether the search should find only prospect records.
Records to Include	Pull-down list used to specify if the search includes persons, organizations, or both.
Number of records per page	Pull-down list that specifies the maximum number of records to be displayed before you have to go to another page. You can display between 1 and 99 records at a time.

Updates to Banner

This page updates Banner as follows.

Item	Description
Save Header Information	Updates AOBDOSR

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Save Header Information	Saves your custom search
Reset All Fields	Returns default values to the fields

Update a Custom Search (bwdksrch.P_Get_Custom_Search and bwdksrch.P_Build_Custom_Search)

The Update a Custom Search page has two uses:

- When accessed via the **Update Custom Searches** button on the Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches), this page is used to update an existing custom search.
- When accessed via the **Save Header Information** button on the Create a New Custom Search page (bwdksrch.P_Input_Custom_Search), this page is used to build search details for a new custom search.

The Advancement Officer Search Options Form (ATVDOSR) determines what fields are displayed in the Detail Search Options section of this page. This form also determines the sequence in which the search options are listed on this page. For more information, refer to the *Banner Advancement User Guide*.

If none of the listed searches meets your needs, you can select the **Create a New Custom Search** button at the bottom of the page to create a new search.

Updating a Custom Search

You can modify any custom or delivered search except a Population Selection Search.

1. Access the Secure Area and navigate to the Advancement Officers menu (twbkwbis.P_GenMenu).
2. Select the Advancement Officer Searches link.

The Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches) is displayed.

3. Select the **Update Custom Searches** button.

The Update a Custom Search page (bwdksrch.P_Get_Custom_Search) is displayed with a pull-down list of search titles.

4. Select the search you want to modify from the pull-down list.

5. Select the **Go** button.

The Update a Custom Search page is displayed with all available fields.



Note: Your institution defines what search criteria options are available. This is done on the Advancement Officer Search Options Form (ATVDOSR).

6. In the Search Header Information section, review the values and make any changes, if desired.
7. In the Detail Search Options section, review the possible search criteria items that are listed (**Identification Number, Name, Donor Category**, and so on).

Review the selections and make any changes, if desired. (Select the **Include** check box for the search options you want to include in the custom search. Clear the check box for the search options you want to exclude from the custom search.)

8. Review the order in which the items are listed.

If you want them to appear in a different order when your search results are displayed, change the number in the **Sequence** field.

For example, if you want **Preferred Class Year** to be at the top of your search results, make sure the value in the **Sequence** field is 1.

9. Select the **Update Options** button to save your changes.

Building Details for a New Custom Search

1. Access the Secure Area and navigate to the Advancement Officers menu (twbkwbis.P_GenMenu).

2. Select the Advancement Officer Searches link.

The Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches) is displayed.

3. Select the **Create a New Custom Search** button.

The Create a New Custom Search page (bwdksrch.P_Input_Custom_Search) is displayed.

4. Enter header information that defines your custom search.

5. Select the **Save Header Information** button.

The Update a Custom Search page (bwdksrch.P_Build_Custom_Search) is displayed so you can define the search criteria for your custom search. The Search Header Information section contains the information from the previous page, but you can change it. You can also select a different search to change from the first pull-down list.

6. In the Detail Search Options section, review the possible search criteria items that are listed (**Identification Number, Name, Donor Category**, and so on).

All are included in your custom search by default. You must clear the **Include** check box for each item you do not want to appear in your search.

For example, if you want to search for people in a specific geographic region but you do not want to search for people by income code, make sure the **Include** check box is selected for **Geographic Region** and cleared for **Income Code**.

7. Review the sequence in which the items are listed.

If you want them to appear in a different order when your search results are displayed, change the number in the **Sequence** field.

For example, if you want **Preferred Class Year** to be at the top of your search results, change the value in the **Sequence** field to 1.

8. Select the **Update Options** button to save your changes.

Deleting a Custom Search

You can delete any custom or delivered search except a Population Selection Search.



Note: If you delete all custom and delivered searches, the system automatically rebuilds and displays the delivered searches the next time you sign on.

1. Access the Secure Area and navigate to the Advancement Officers menu (twbkwbis.P_GenMenu).
2. Select the Advancement Officer Searches link.
The Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches) is displayed.
3. Select the **Update Custom Searches** button.
The Update a Custom Search page (bwdksrch.P_Get_Custom_Search) is displayed with a pull-down list of search titles.
4. Select the search you want to delete from the pull-down list.
5. Select the **Go** button.
The Update a Custom Search page is displayed with all its fields.
6. Select the **Delete this Custom Search** button.

Making a Custom Search Inactive

If a custom search is inactive, it is not displayed on the Advancement Officers menu but is available for later use.

1. Access the Secure Area and navigate to the Advancement Officers menu (twbkwbis.P_GenMenu).
2. Select the Advancement Officer Searches link.
The Advancement Officer Searches menu (bwdksrch.P_Display_Custom_Searches) is displayed.

3. Select the **Update Custom Searches** button.
The Update a Custom Search page (bwdksrch.P_Get_Custom_Search) is displayed.
4. Select the search that you want to make inactive from the pull-down list.
5. Select the **Go** button.
The Update a Custom Search page (bwdksrch.P_Get_Custom_Search) is displayed.
6. Clear the **Display search on menu** check box. This makes the search inactive but does not delete it.
7. Select the **Update Options** button to save your changes.

When you go to the Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searchs), the search is not included on the menu.

Making an Inactive Custom Search Active

If a custom search is active, it is displayed on the Advancement Officers menu.

1. Access the Secure Area and navigate to the Advancement Officers menu (twbkwbis.P_GenMenu).
2. Select the Advancement Officer Searches link.
The Advancement Officer Searches menu (bwdksrch.P_Display_Custom_Searchs) is displayed.
3. Select the **Update Custom Searches** button.
The Update a Custom Search page (bwdksrch.P_Get_Custom_Search) is displayed.
4. Select the search that you want to make active from the pull-down list.
5. Select the **Go** button.
The Update a Custom Search page (bwdksrch.P_Get_Custom_Search) is displayed.
6. Select the **Display search on menu** check box to make the search active.
7. Select the **Update Options** button to save your changes.

When you go to the Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searchs), the search is included on the menu.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
Advancement Officer Search Options Form (ATVDOSR)	Select the Display check box for each item that you want to appear on the Web.

Web page fields

This page contains the following fields.

Item	Description/source information
Custom Search Name (untitled)	Pull-down list that allows you to select the name of the custom search you want to update. Custom searches that you can update are displayed alphabetically by search name.
The following fields are displayed in the Search Header Information section after a custom search is selected from the Custom Search Name pull-down list.	
Custom Search Title	<p>Title of the custom search, up to 60 characters. This title will be displayed in the list of available custom searches on the Advancement Officers Searches menu (bwdkrsch.P_Display_Custom_Searches) and as the dynamic title on the Search Results page (bwdkrsch.P_Execute_Custom_Search). Required.</p> <p>Searches are displayed on the Advancement Officers Searches menu alphabetically by custom search title (after the Population Selection search).</p>
Display search on menu	Check box used to specify whether the title should appear on the Advancement Officers Searches menu (bwdkrsch.P_Display_Custom_Searches).
Limit search to Prospect records only	Check box used to specify whether the search should find only prospect records.
Records to Include	Pull-down list used to specify if the search includes persons, organizations, or both.
Number of records per page	Pull-down list that specifies the maximum number of records to be displayed before you have to go to another page. You can display between 1 and 99 records at a time.
Selection fields	<p>For all fields that you want to appear in the custom search:</p> <ul style="list-style-type: none"> • Enter a number in Display Sequence to indicate the order in which the item should appear in the custom search. • Select the Include check box. <p>If any of the following fields are selected, three sets of fields will be displayed on the search page for that item. This allows advancement officers to search on three combinations of the associated item.</p> <ul style="list-style-type: none"> • Degree Year, College, and Major • Activity Type and Category • Special Purpose Type and Code

Updates to Banner

This page updates Banner as follows.

Item	Description
Update Options	Updates AORDOSR

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Return to Menu	Goes to the Advancement Officers Searches menu (bwdksrch.P_Display_Custom_Searches)

Buttons/icons on this page

This page contains the following buttons/icons.

Button/icon	Action
Go	Retrieves your custom search
Update Options	Saves your custom search with any changes you made
Reset All Fields	Returns the values in the fields to the default values
Delete this Custom Search	Deletes the search
Create a New Custom Search	Goes to the Create a New Custom Search page (bwdksrch.P_Input_Custom_Search) so you can create another custom search

Constituent Short Profile (bwdkprf.P_Short_Profile)

The Constituent Short Profile page displays profile information for the selected record.

Setup requirements

The following setup is required for this page to work as expected. You can define different settings for the short and long profile pages.

Item	Description
General Profile Preferences (bwdkprf.P_Input_Gnrl_Pref) page	Specify the information you want to be displayed in the header of this page. You can display the ID and name only, or you can display expanded header information.
Advancement Individual Profile Preferences (bwdkprf.P_Input_Cons_Pref) page	Specify which details you want to be included and the order in which the details are displayed for advancement individuals.
Advancement Organization Profile Preferences (bwdkprf.P_Input_Org_Pref) page	Specify which details you want to be included and the order in which the details are displayed for advancement organizations.

Web page fields

There are multiple versions of this page:

- [“Individual version of the page” on page 180](#)
- [“Organization version of the page” on page 183](#)

Individual version of the page

This page contains the following fields.

Item	Description/source information
Names and Salutations	<p>This section shows alternate names, salutations, gift society name, and combined name. The information comes from:</p> <ul style="list-style-type: none">• Advancement Mail Form (APAMAIL)• Advancement Individual/Organization Names Form (APANAME)• Advancement Identification Form (APAIDEN) <p>Salutations are sorted alphabetically by code description.</p> <p>If you selected an alternate name type on the General Profile Preferences page, any alternate name records with that type are displayed for the advancement individual. If alternate names exist, they are sorted first by activity date and then alphabetically by name type description.</p>
Internet Addresses	<p>Advancement E-mail Address Form (APAEMAL)</p> <p>This section shows e-mail addresses as links.</p>
Employment History	<p>Employment History Form (APAEHIS)</p> <p>This field is displayed only if the constituent is an individual.</p> <p>If specified in the General Profile Preferences settings, the employer IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (e.g., Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>

Item	Description/source information
Cross References	<p>Cross Reference Form (APAXREF)</p> <p>If information about the person is confidential, (<i>Confidential</i>) appears after the person's name.</p> <p>If the person is deceased, <i>Deceased</i> appears in that column. If known, the date of death appears after the word <i>Deceased</i>.</p> <p>If specified in the General Profile Preferences settings, the IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (e.g., Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>
Organization Information	<p>Advancement Organization Header Form (AOAORGN)</p> <p>This field is displayed only if the constituent is an organization.</p>
Degrees	<p>Academic Information Form (APAADEG)</p>
Children	<p>Children Information Form (APACHLD)</p> <p>If the information about the person is confidential, (<i>Confidential</i>) appears after the person's name.</p> <p>If the person is deceased, <i>Deceased</i> appears in that column. If known, the date of death appears after the word <i>Deceased</i>.</p> <p>If specified in the General Profile Preferences settings, the IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (e.g., Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>
Biographic Information	<p>Advancement Identification Form (APAIIDEN)</p>
Constituent Information	<p>Advancement Individual Information Form (APACONS)</p>
Activities	<p>Activities Form (APAACTY)</p>
Solicitor Information	<p>Contacts by Solicitor Query Form (ASICONT)</p>
Prospect Information	<p>Advancement Prospect Information Form (AMAINFO)</p>
Membership Information	<p>Membership by ID List Form (AACMEMB)</p>
Gift Society Information	<p>Gift Society List Form (APACLUB)</p>

Item	Description/source information
Constituent Categories	Advancement Individual Information Form (APACONS)
Exclusion Codes	Advancement Mail Form (APAMAIL)
Mail Codes	Advancement Mail Form (APAMAIL)
Addresses	<p data-bbox="597 426 1364 667">Advancement Address List Form (APCADDR)</p> <p data-bbox="597 478 1364 667">This section displays the full address, including nation (as defined on the Advancement Identification Form (APAIDEN)) for all address types. It also displays the telephone number, telephone type and comments associated with the telephone record if the telephone record is linked to the address (the Address Type drop-down on the telephone record on APAIDEN contains a value).</p> <p data-bbox="597 688 1364 783">In addition, if an address is associated with an Employment History record, the address information also includes the employer's name and the employee's job title.</p>
Contacts	Contact Form (APACONT)
Religion, Race and Ethnicity	<p data-bbox="597 867 1364 951">This section shows religion, race and ethnicity information from the Biographical tab of the Advancement Identification Form (APAIDEN).</p> <p data-bbox="597 972 1364 1098">You may want to restrict access to sensitive information such as religion, race, and ethnicity using Banner's Fine-Grained Access Control (FGAC). For details on hiding information via FGAC, refer to the <i>Banner Data Security Handbook</i>.</p>
Additional Phone Numbers	<p data-bbox="597 1129 1364 1161">Advancement Identification Form (APAIDEN)</p> <p data-bbox="597 1182 1364 1360">Telephone records only display in this section when they are not associated with an address (the Address Type drop-down on the Telephone record on APAIDEN is blank). When a telephone record appears here, it will include the telephone number, telephone type and comments associated with the telephone record.</p>
External Ratings	Advancement Prospect Information (AMAINFO)
Giving Totals	Values are calculated using the same logic as in the Giving History Summary Form (APAGHIS).
Ratings	Advancement Prospect Information (AMAINFO)
Staff Assignments	Advancement Prospect Information (AMAINFO)
Planned Giving	Pledge Form (AGAPLDG) and Gift Form (AGAGIFT)
User Alerts	User Alerts Form (AUAALRT)

Item	Description/source information
Comments	<p>Advancement Individual/Organization Comments (APACOMT)</p> <p>When a confidential comment exists, the word Yes appears in the confidential column and the confidential comment displays in the Comment field. The restriction of confidential comments only displaying for the originator or supervisor in Banner Advancement do not apply to Self-Service.</p>
Variable and Special Purpose Information	<p>Special Purpose (APASPUR)</p> <p>Displays three sections: variable purpose, special purpose, and memo.</p>
Event Attendance	<p>Displays an event attendance summary, a list of past events attended, and a list of upcoming events the individual is registered to attend. Events on the current date are in the Upcoming Event Registrations section.</p>

Organization version of the page

This page contains the following fields.

Item	Description/source information
Names and Salutations	<p>This section shows alternate names, salutations, gift society name, and combined name. The information comes from:</p> <ul style="list-style-type: none"> • Advancement Mail Form (APAMAIL) • Advancement Individual/Organization Names Form (APANAME) • Advancement Identification Form (APAIDEN) <p>Salutations are sorted alphabetically by code description.</p> <p>If you selected an alternate name type on the General Profile Preferences page, any alternate name records with that type are displayed for the advancement organization. If alternate names exist, they are sorted first by activity date and then alphabetically by name type description.</p>
Internet Address	<p>Advancement E-mail Address Form (APAEMAL)</p> <p>This section shows e-mail addresses as links.</p>
Activities	Activities Form (APAACTY)

Item	Description/source information
Cross References	<p>Cross Reference Form (APAXREF)</p> <p>If information about the organization is confidential, (<i>Confidential</i>) appears after the person's name.</p> <p>If specified in the General Profile Preferences settings, the IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (for example, Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>
Organization Information	Advancement Organization Header Form (AOAORGN)
Contact Information	<p>Advancement Organization Header Form (AOAORGN)</p> <p>If specified in the General Profile Preferences settings, the IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (for example, Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>
Funding Information	Advancement Organization Header Form (AOAORGN)
Matching Gift Information	Advancement Organization Header Form (AOAORGN)
Financial Information	Advancement Organization Header Form (AOAORGN)
Exclusion Codes	Advancement Mail Form (APAMAIL)
Mail Codes	Advancement Mail Form (APAMAIL)
Solicitor Information	Contacts by Solicitor Query Form (ASICONT)
Membership Information	Membership by ID List Form (AACMEMB)
Gift Society Information	Gift Society List Form (APACLUB)
Constituent Categories	Advancement Organization Header Form (AOAORGN)
Addresses	<p>Advancement Address List Form (APCADDR)</p> <p>This section displays the full address, including nation (as defined on the Advancement Identification Form (APAIDEN)) for all address types. It also displays the telephone number and telephone type.</p>
Contacts	Contact Form (APACONT)

Item	Description/source information
Additional Phone Numbers	Advancement Identification Form (APAIDEN)
External Ratings	Advancement Prospect Information Form (AMAINFO)
Giving Totals	Values are calculated using the same logic as in the Giving History Summary Form (APAGHIS)
Ratings	Advancement Prospect Information Form (AMAINFO)
Staff Assignments	Advancement Prospect Information Form (AMAINFO)
Planned Giving	Pledge Form (AGAPLDG) and Gift Form (AGAGIFT)
User Alerts	User Alerts Form (AUAALRT)
Comments	Advancement Individual/Organization Comments (APACOMT) When a confidential comment exists, the word Yes appears in the confidential column and the confidential comment displays in the Comment field. The restriction of confidential comments only displaying for the originator or supervisor in Banner Advancement do not apply to Self-Service.
Variable and Special Purpose Information	Special Purpose (APASPUR) Displays three sections: variable purpose, special purpose, an memo.
Event Attendance	Displays an event attendance summary, a list of past events attended, and a list of upcoming events the individual is registered to attend. Events on the current date are in the Upcoming Event Registrations section.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Employer ID	Goes to the Constituent Short Profile page (bwdkcprf.P_Short_Profile) for the employer
Child ID	Goes to the Constituent Short Profile page (bwdkcprf.P_Short_Profile) for the child
Parent ID	Goes to the Constituent Short Profile page (bwdkcprf.P_Short_Profile) for the parent

Link	Action
Pledge Amount	Goes to the Pledge Detail page (bwdkghis.P_ViewPledge_Detail)
Gift Amount	Goes to the Gift Detail page (bwdkghis.P_ViewGift_Detail)
View Combined Giving	Goes to the Giving History page (bwdkghis.P_View_Gifts)
Return to ID List	Goes to the Search Results page (bwdksrch.P_Display_Search_Results)

Constituent Long Profile (bwdkcprf.P_Long_Profile)

The Constituent Long Profile page displays profile information for the selected record.

Setup requirements

The following setup is required for this page to work as expected. You can define different settings for the short and long profile pages.

Item	Description
General Profile Preferences (bwdkpref.P_Input_Gnrl_Pref) page	Specify the information you want to be displayed in the header of this page. You can display the ID and name only, or you can display expanded header information.
Advancement Individual Profile Preferences (bwdkpref.P_Input_Cons_Pref) page	Specify which details you want to be included and the order in which the details are displayed for advancement individuals.
Advancement Organization Profile Preferences (bwdkpref.P_Input_Org_Pref) page	Specify which details you want to be included and the order in which the details are displayed for advancement organizations.

Web page fields

There are multiple versions of this page:

- [“Individual version of the page” on page 187](#)
- [“Organization version of the page” on page 190](#)

Individual version of the page

This page contains the following fields.

Item	Description/source information
Names and Salutations	<p>This section shows alternate names, salutations, gift society name, and combined name. The information comes from:</p> <ul style="list-style-type: none">• Advancement Mail Form (APAMAIL)• Advancement Individual/Organization Names Form (APANAME)• Advancement Identification Form (APAIDEN) <p>Salutations are sorted alphabetically by code description.</p> <p>If you selected an alternate name type on the General Profile Preferences page, any alternate name records with that type are displayed for the advancement individual. If alternate names exist, they are sorted first by activity date and then alphabetically by name type description.</p>
Internet Addresses	<p>Advancement Identification Form (APAIDEN)</p> <p>This section shows e-mail addresses as links.</p>
Employment History	<p>Employment History Form (APAEHIS)</p> <p>If specified in the General Profile Preferences settings, the employer IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (e.g., Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>
Cross References	<p>Cross Reference Form (APAXREF)</p> <p>If information about the person is confidential, (<i>Confidential</i>) appears after the person's name.</p> <p>If the person is deceased, <i>Deceased</i> appears in that column. If known, the date of death appears after the word <i>Deceased</i>.</p> <p>If specified in the General Profile Preferences settings, the IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (e.g., Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>

Item	Description/source information
Degrees	Academic Information Form (APAADEG)
Children	<p>Children Information Form (APACHLD)</p> <p>If the information about the person is confidential, (<i>Confidential</i>) appears after the person's name.</p> <p>If the person is deceased, <i>Deceased</i> appears in that column. If known, the date of death appears after the word <i>Deceased</i>.</p> <p>If specified in the General Profile Preferences settings, the IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (e.g., Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>
Biographic Information	Advancement Identification Form (APAIDEN)
Constituent Information	Advancement Individual Information Form (APACONS)
Activities	Activities Form (APAACTY)
Solicitor Information	Contacts by Solicitor Query Form (ASICONT)
Prospect Information	Advancement Prospect Information Form (AMAINFO)
Membership Information	Membership by ID List Form (AACMEMB)
Gift Society Information	Gift Society List Form (APACLUB)
Constituent Categories	Advancement Individual Information Form (APACONS)
Exclusion Codes	Advancement Mail Form (APAMAIL)
Mail Codes	Advancement Mail Form (APAMAIL)
Addresses	<p>Advancement Address List Form (APCADDR)</p> <p>This section displays the full address, including nation (as defined on the Advancement Identification Form (APAIDEN)) for all address types. It also displays the telephone number, telephone type and comments associated with the telephone record if the telephone record is linked to the address (the Address Type drop-down on the telephone record on APAIDEN contains a value).</p> <p>In addition, if an address is associated with an Employment History record, the address information also includes the employer's name and the employee's job title.</p>
Contacts	Contact Form (APACONT)

Item	Description/source information
Religion, Race and Ethnicity	<p>This section shows religion, race and ethnicity information from the Biographical tab of the Advancement Identification Form (APAIDEN).</p> <p>You may want to restrict access to sensitive information such as religion, race, and ethnicity using Banner's Fine-Grained Access Control (FGAC). For details on hiding information via FGAC, refer to the <i>Banner Data Security Handbook</i>.</p>
Additional Phone Numbers	<p>Advancement Identification Form (APAIDEN)</p> <p>Telephone records only display in this section when they are not associated with an address (the Address Type drop-down on the Telephone record on APAIDEN is blank). When a telephone record appears here, it will include the telephone number, telephone type and comments associated with the telephone record.</p>
External Ratings	Advancement Prospect Information (AMAINFO)
Giving Totals	Values are calculated using the same logic as in the Giving History Summary Form (APAGHIS).
Ratings	Advancement Prospect Information (AMAINFO)
Staff Assignments	Advancement Prospect Information (AMAINFO)
User Alerts	User Alerts Form (AUAALRT)
Planned Giving	<p>Gift List Form (AGCGIFT)</p> <p>Pledge List Form (AGCPLDG)</p> <p>This section shows pledges that have a type code flagged for planned giving on the Pledge Type Validation Form (ATVPLDG) and gifts that have a type code flagged for planned giving on the Gift/Payment Type Validation Form (ATVGIFT).</p>
Comments	<p>Advancement Individual/Organization Comments (APACOMT)</p> <p>When a confidential comment exists, the word Yes appears in the confidential column and the confidential comment displays in the Comment field. The restriction of confidential comments only displaying for the originator or supervisor in Banner Advancement do not apply to Self-Service.</p>
Variable and Special Purpose Information	<p>Special Purpose (APASPUR)</p> <p>Displays three sections: variable purpose, special purpose, and memo.</p>
Event Attendance	Displays an event attendance summary, a list of past events attended, and a list of upcoming events the individual is registered to attend. Events on the current date are in the Upcoming Event Registrations section.

Organization version of the page

This page contains the following fields.

Item	Description/source information
Names and Salutations	<p>This section shows alternate names, salutations, gift society name, and combined name. The information comes from:</p> <ul style="list-style-type: none"> • Advancement Mail Form (APAMAIL) • Advancement Individual/Organization Names Form (APANAME) • Advancement Identification Form (APAIDEN) <p>Salutations are sorted alphabetically by code description.</p> <p>If you selected an alternate name type on the General Profile Preferences page, any alternate name records with that type are displayed for the advancement organization. If alternate names exist, they are sorted first by activity date and then alphabetically by name type description.</p>
Internet Address	<p>Advancement E-mail Address Form (APAIDEN)</p> <p>This section shows e-mail addresses as links.</p>
Activities	<p>Activities Form (APAACTY)</p>
Cross References	<p>Cross Reference Form (APAXREF)</p> <p>If information about the person is confidential, (<i>Confidential</i>) appears after the organization's name.</p> <p>If specified in the General Profile Preferences settings, the IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (for example, Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>
Organization Information	<p>Advancement Organization Header Form (AOAORGN)</p>
Contact Information	<p>Advancement Organization Header Form (AOAORGN)</p> <p>If specified in the General Profile Preferences settings, the IDs in this section are displayed as links that go directly to information about that ID. You specify the default target page (e.g., Constituent Long Profile, Prospect Short Profile) on the General Profile Preferences page. However, you can select a different page from the pull-down list next to the ID and select the Go button.</p> <p>If the default target page you selected is not available for the ID, that ID is not rendered as a link.</p>

Item	Description/source information
Funding Information	Advancement Organization Header Form (AOAORGN)
Matching Gift Information	Advancement Organization Header Form (AOAORGN)
Financial Information	Advancement Organization Header Form (AOAORGN)
Exclusion Codes	Advancement Mail Form (APAMAIL)
Mail Codes	Advancement Mail Form (APAMAIL)
Solicitor Information	Contacts by Solicitor Query Form (ASICONT)
Membership Information	Membership by ID List Form (AACMEMB)
Gift Society Information	Gift Society List Form (APACLUB)
Constituent Categories	Advancement Organization Header Form (AOAORGN)
Addresses	Advancement Address List Form (APCADDR) This section displays the full address, including nation (as defined on the Advancement Identification Form (APAIDEN)) for all address types. It also displays the telephone number, telephone type and comments associated with the telephone record if the telephone record is linked to the address (the Address Type drop-down on the telephone record on APAIDEN contains a value).
Contacts	Contact Form (APACONT)
Staff Assignments	Advancement Prospect Information Form (AMAINFO)
Ratings	Advancement Prospect Information Form (AMAINFO)
External Ratings	Advancement Prospect Information Form (AMAINFO)
Giving Totals	Values are calculated using the same logic as in the Giving History Summary Form (APAGHIS)
Additional Phone Numbers	Advancement Identification Form (APAIDEN)
Planned Giving	Gift List Form (AGCGIFT) Pledge List Form (AGCPLDG) This section shows pledges that have a type code flagged for planned giving on the Pledge Type Validation Form (ATVPLDG) and gifts that have a type code flagged for planned giving on the Gift/Payment Type Validation Form (ATVGIFT).
User Alerts	User Alerts Form (AUAALRT)

Item	Description/source information
Comments	Advancement Individual/Organization Comments (APACOMT) When a confidential comment exists, the word Yes appears in the confidential column and the confidential comment displays in the Comment field. The restriction of confidential comments only displaying for the originator or supervisor in Banner Advancement do not apply to Self-Service.
Variable and Special Purpose Information	Special Purpose (APASPUR) Displays three sections: variable purpose, special purpose, and memo.
Event Attendance	Displays an event attendance summary, a list of past events attended, and a list of upcoming events the individual is registered to attend. Events on the current date are in the Upcoming Event Registrations section.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Employer ID	Goes to the Constituent Short Profile page (bwdkcprf.P_Short_Profile) for the employer
Child ID	Goes to the Constituent Short Profile page (bwdkcprf.P_Short_Profile) for the child
Parent ID	Goes to the Constituent Short Profile page (bwdkcprf.P_Short_Profile) for the parent
Pledge Amount	Goes to the Pledge Detail page (bwdkghis.P_ViewPledge_Detail)
Gift Amount	Goes to the Gift Detail page (bwdkghis.P_ViewGift_Detail)
View Combined Giving	Goes to the Giving History page (bwdkghis.P_View_Gifts)
Return to ID List	Goes to the Search Results page (bwdksrch.P_Display_Search_Results)

Prospect Short Profile (bwdkprf.P_Short_Profile)

The Prospect Short Profile page displays profile information for the selected record.

Setup requirements

The following setup is required for this page to work as expected. You can define different settings for the short and long profile pages.

Item	Description
General Profile Preferences (bwdkprf.P_Input_Gnrl_Pref) page	Specify the information you want to be displayed in the header of this page. You can display the ID and name only, or you can display expanded header information.
Prospect Profile Preferences (bwdkprf.P_Input_Prof_Pref) page	Specify which details you want to be included and the order in which the details are displayed for prospects.

Web page fields

This page contains the following fields.

Item	Description/source information
Addresses	Advancement Address List Form (APCADDR) This section displays the full address, including nation (as defined on the Advancement Identification Form (APAIDEN)) for all address types. It also displays the telephone number, telephone type and comments associated with the telephone record if the telephone record is linked to the address (the Address Type drop-down on the telephone record on APAIDEN contains a value). In addition, if an address is associated with an Employment History record, the address information also includes the employer's name and the employee's job title.
User Alerts	User Alerts Form (AUAALRT)
Internet Addresses	Advancement Identification Form (APAIDEN) This section shows e-mail addresses as links.
General	Advancement Prospect Information Form (AMAINFO)

Item	Description/source information
Target Information	<p>Advancement Prospect Information Form (AMAINFO)</p> <p>This section displays the Asking Amount and Asking Date. If only one field contains data, the field that doesn't contain a value will appear blank. If information is not available for either field, the text No Target Information appears.</p>
Ratings	Advancement Prospect Information Form (AMAINFO)
Staff Assignments	Advancement Prospect Information Form (AMAINFO)
Project/Interest Areas	Advancement Prospect Information Form (AMAINFO)
External Ratings	Advancement Prospect Information Form (AMAINFO)
Strategy Plans	Prospect Strategy Plan Form (AMAPLAN)
Prospect Contacts	Contact Form (APACONT)
Prospect Proposals	Prospect Proposal Form (AMAPROP)
Prospect Moves	<p>Moves by Prospect Form (AMAPROS)</p> <p>The move codes in this section are displayed as links that go directly to the Update a Move page (if the user has the Moves Manager role). Links are also available to view or add contacts for moves.</p>
Names and Salutations	<p>This section shows alternate names, salutations, gift society name, and combined name. The information comes from:</p> <ul style="list-style-type: none"> • Advancement Mail Form (APAMAIL) • Advancement Individual/Organization Names Form (APANAME) • Advancement Identification Form (APAIDEN) <p>Salutations are sorted alphabetically by code description.</p> <p>If you selected an alternate name type on the General Profile Preferences page, any alternate name records with that type are displayed for the constituent. If alternate names exist, they are sorted first by activity date and then alphabetically by name type description.</p>
Comments	<p>Prospect Comments Form (AMACOMT) Advancement Individual/Organization Comments Form (APACOMT)</p> <p>When a confidential comment exists, the word Yes appears in the confidential column and the confidential comment displays in the Comment field. The restriction of confidential comments only displaying for the originator or supervisor in Banner Advancement do not apply to Self-Service.</p>
Research Data	Advancement Prospect Information Form (AMAINFO) (Research Data subtab on the Research tab)

Item	Description/source information
Prospect Resource or Source Information	Advancement Prospect Information Form (AMAINFO) This section displays the sources of prospect information.
Prospect Researchers	Advancement Prospect Information Form (AMAINFO) This section lists the researchers and the date the information was prepared.
Additional Phone Numbers	Advancement Identification Form (APAIDEN) Telephone records only display in this section when they are not associated with an address (the Address Type drop-down on the Telephone record on APAIDEN is blank). When a telephone record appears here, it will include the telephone number, telephone type and comments associated with the telephone record.
Giving Totals	Values are calculated using the same logic as in the Giving History Summary Form (APAGHIIS).
Planned Giving	Gift List Form (AGCGIFT) Pledge List Form (AGCPLDG) This section shows pledges that have a type code flagged for planned giving on the Pledge Type Validation Form (ATVPLDG) and gifts that have a type code flagged for planned giving on the Gift/Payment Type Validation Form (ATVGIFT).
Variable and Special Purpose Information	Special Purpose (APASPUR) Displays three sections: variable purpose, special purpose, and memo.
Event Attendance	Displays an event attendance summary, a list of past events attended, and a list of upcoming events the prospect is registered to attend. Events on the current date are in the Upcoming Event Registrations section.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Pledge Amount	Goes to the Pledge Detail page (bwdkghis.P_ViewPledge_Detail)

Link	Action
Gift Amount	Goes to the Gift Detail page (bwdkghis.P_ViewGift_Detail)
View Combined Giving	Goes to the Giving History page (bwdkghis.P_View_Gifts)
Move Code	Update a Move page (bwdkmove.P_Update_A_Move)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)
Contacts Exist	Goes to the View a Contact page (bwdkpcnt.P_View_Contacts)
Return to ID List	Goes to the Search Results page (bwdksrch.P_Display_Search_Results)

Prospect Long Profile (bwdkpprf.P_Long_Profile)

The Prospect Long Profile page displays profile information for the selected record.

Setup requirements

The following setup is required for this page to work as expected. You can define different settings for the short and long profile pages.

Item	Description
General Profile Preferences (bwdkpref.P_Input_Gnrl_Pref) page	Specify the information you want to be displayed in the header of this page. You can display the ID and name only, or you can display expanded header information.
Prospect Profile Preferences (bwdkpref.P_Input_Pros_Pref) page	Specify which details you want to be included and the order in which the details are displayed for prospects.

Web page fields

This page contains the following fields.

Item	Description/source information
Addresses	<p>Advancement Address List Form (APCADDR)</p> <p>This section displays the full address, including nation (as defined on the Advancement Identification Form (APAIDEN)) for all address types. It also displays the telephone number, telephone type and comments associated with the telephone record if the telephone record is linked to the address (the Address Type drop-down on the telephone record on APAIDEN contains a value).</p> <p>In addition, if an address is associated with an Employment History record, the address information also includes the employer's name and the employee's job title.</p>
Internet Address	<p>Advancement Identification Form (APAIDEN)</p> <p>This section shows e-mail addresses as links.</p>
General	Advancement Prospect Information Form (AMAINFO)
Target Information	<p>Advancement Prospect Information Form (AMAINFO)</p> <p>This section displays the Asking Amount and Asking Date. If only one field contains data, the field that doesn't contain a value will appear blank. If information is not available for either field, the text No Target Information appears.</p>
Ratings	Advancement Prospect Information Form (AMAINFO)
Staff Assignments	Advancement Prospect Information Form (AMAINFO)
Project/Interest Areas	Advancement Prospect Information Form (AMAINFO)
External Ratings	Advancement Prospect Information Form (AMAINFO)
Strategy Plans	Prospect Strategy Plan Form (AMAPLAN)
Prospect Contacts	Contact Form (APACONT)
Prospect Proposals	Prospect Proposal Form (AMAPROP)
Prospect Moves	<p>Moves by Prospect Form (AMAPROS)</p> <p>The move codes in this section are displayed as links that go directly to the Update a Move page (if the user has the Moves Manager role). Links are also available to view or add contacts for moves.</p>

Item	Description/source information
Names and Salutations	<p>This section shows alternate names, salutations, gift society name, and combined name. The information comes from:</p> <ul style="list-style-type: none"> • Advancement Mail Form (APAMAIL) • Advancement Individual/Organization Names Form (APANAME) • Advancement Identification Form (APAIDEN) <p>Salutations are sorted alphabetically by code description.</p> <p>If you selected an alternate name type on the General Profile Preferences page, any alternate name records with that type are displayed for the constituent. If alternate names exist, they are sorted first by activity date and then alphabetically by name type description.</p>
Comments	<p>Prospect Comments Form (AMACOMT) Advancement Individual/Organization Comments Form (APACOMT)</p> <p>When a confidential comment exists, the word Yes appears in the confidential column and the confidential comment displays in the Comment field. The restriction of confidential comments only displaying for the originator or supervisor in Banner Advancement do not apply to Self-Service.</p>
Research Data	<p>Advancement Prospect Information Form (AMAINFO) (Research Data subtab on the Research tab)</p>
Prospect Resource or Source Information	<p>Advancement Prospect Information Form (AMAINFO)</p> <p>This section displays the sources of prospect information.</p>
Prospect Researchers	<p>Advancement Prospect Information Form (AMAINFO)</p> <p>This section lists the researchers and the date the information was prepared.</p>
Giving Totals	<p>Values are calculated using the same logic as in the Giving History Summary Form (APAGHIIS).</p>
Additional Phone Numbers	<p>Advancement Identification Form (APAIDEN)</p> <p>Telephone records only display in this section when they are not associated with an address (the Address Type drop-down on the Telephone record on APAIDEN is blank). When a telephone record appears here, it will include the telephone number, telephone type and comments associated with the telephone record.</p>
User Alerts	<p>User Alerts Form (AUAALRT)</p>

Item	Description/source information
Planned Giving	Gift List Form (AGCGIFT) Pledge List Form (AGCPLDG) This section shows pledges that have a type code flagged for planned giving on the Pledge Type Validation Form (ATVPLDG) and gifts that have a type code flagged for planned giving on the Gift/Payment Type Validation Form (ATVGIFT).
Variable and Special Purpose Information	Special Purpose (APASPUR) Displays three sections: variable purpose, special purpose, and memo.
Event Attendance	Displays an event attendance summary, a list of past events attended, and a list of upcoming events the prospect is registered to attend. Events on the current date are in the Upcoming Event Registrations section.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Pledge Amount	Goes to the Pledge Detail page (bwdkghis.P_ViewPledge_Detail)
Gift Amount	Goes to the Gift Detail page (bwdkghis.P_ViewGift_Detail)
View Combined Giving	Goes to the Giving History page (bwdkghis.P_View_Gifts)
Move Code	Goes to the Update a Move page (bwdkmove.P_Update_A_Move)
Add a Contact	Goes to the Add a Contact page (bwdkpcnt.P_Enter_Contact)
Contacts Exist	Goes to the View a Contact page (bwdkpcnt.P_View_Contacts)
Return to ID List	Goes to the Search Results page (bwdksrch.P_Display_Search_Results)

Giving History (bwdkghis.P_View_Gifts)

The Giving History page displays giving history for the record selected. The pledges that are included in pledge totals on this page are determined as follows:

- If the **Include in Giving** indicator on the Pledge Status Code Validation Form (ATVPSTA) is selected for a pledge status code, then all pledges with that status code are included in the pledge totals.
- If the **Include in Giving** indicator on ATVPSTA is not selected for a pledge status code, then the radio group at the top of the page (**Include partially paid pledges in counts and totals regardless of pledge status**) determines whether pledges with that status code are included in the pledge totals. You can choose to exclude these pledges, include the full pledge amount, or include the amount actually paid.

Setup requirements

The following setup is required for this page to work as expected.

Item	Description
General Profile Preferences (bwdkpref.P_Input_Gnrl_Pref) page	Specify the information you want to be displayed in the header of this page. You can display the ID and name only, or you can display expanded header information.

Web page fields

This page contains the following fields.

Item	Description/source information
Include partially paid pledges in counts and totals, regardless of pledge status	<p>Radio group that determines whether pledge totals include partially paid pledges:</p> <p>No - Do not include partially paid pledges in the pledge totals.</p> <p>Include Full Amount - Include the full pledge amount of partially paid pledges in the pledge totals.</p> <p>Include Amount Paid - Include the amount actually paid for partially paid pledges in the pledge totals.</p> <p>This radio group applies to all pledges that have a pledge status code with a cleared Include in Giving indicator on the Pledge Status Code Validation Form (ATVPSTA).</p>

Item	Description/source information
Giving History Area	By Fiscal Year By Campaign and Fiscal Year By Designation and Fiscal Year All Existing Gifts All Existing Pledges All Existing Gifts and Pledges All Planned Gifts Combined Giving Overall Giving
By Fiscal Year	Giving History by Fiscal Year Form (APAFHIS) The Pledge Credit calculation depends on the ATPVSTA settings and the radio group at the top of the page.
By Campaign and Fiscal Year	Giving History by Campaign Form (APACHIS) The Pledge Credit calculation depends on the ATPVSTA settings and the radio group at the top of the page.
By Designation and Fiscal Year	Giving History by Designation Form (APADHIS) The Pledge Credit calculation depends on the ATPVSTA settings and the radio group at the top of the page.
All Existing Gifts	Gift List Form (AGCGIFT) Displays type, date, credit, amount, campaign, designation and comment information for all existing gifts. For gifts with multiple campaign and designation records, the detail is sorted first by date, then alphabetically by campaign, and then alphabetically by designation within campaign.
All Existing Pledges	Pledge List Form (AGCPLDG) Displays date, credit, amount, balance, status, campaign, designation and comment information for all existing pledges (including unpaid pledges). For pledges with multiple campaign and designation records, the detail is sorted first by date, then alphabetically by campaign, and then alphabetically by designation within campaign.
All Existing Gifts and Pledges	Gift List Form (AGCGIFT) Pledge List Form (AGCPLDG) Displays type, date, credit, amount, balance, campaign, designation and comment information for all existing gifts and pledges. For gifts/pledges with multiple campaign and designation records, the detail is sorted first by date, then alphabetically by campaign, and then alphabetically by designation within campaign.

Item	Description/source information
All Planned Gifts	Gift List Form (AGCGIFT) Pledge List Form (AGCPLDG) Displays type, date, transaction type, amount, balance, campaign, designation and comment information for all planned giving gifts and pledges.
Combined Giving	Combined Giving History Summary Form (APACOMB) The Pledge Credit calculation depends on the ATVPSTA settings and the radio group at the top of the page.
Overall Giving	Pledge and Gift Summary Forms (APAGHIS) The Recent, Largest, Most Recent Recognized and Largest Recognized gifts and pledges.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Gift Amount	Goes to Gift Detail page (bwdkghis.P_ViewGift_Detail)
Pledge Amount	Goes to Pledge Detail page (bwdkghis.P_ViewGift_Detail)
Return to ID List	Goes to the Search Results page (bwdksrch.P_Display_Search_Results)

Gift Detail (bwdkghis.P_ViewGift_Detail)

The Gift Detail page displays all information available for the gift selected. This page is accessed by selecting the active dollar amount link from the gift list.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
All Existing Gifts	Gift List Form (AGCGIFT) Displays date, amount, gift type, gift number, gift classification 1, 2, 3 code descriptions and comments for all existing gifts.
Associated ID	Gift Associated ID (AGAGASC) Displays Banner ID, Associated Type, Name and Comment for each associated donor.
Allocation	Gift List Form (AGCGIFT) Displays campaign, designation, amount given, and pledge number for each allocation.
Soft Credit	Gift Soft Credit ID List Form (AGCGMMO) Displays ID, name, campaign, designation, and credit amount for each soft credit.
Additional Details	Additional Details Form (AGAADTL) Displays type code, pledge number, gift number, and details for each additional detail.
Beneficiaries	Beneficiary Information Form (AGAPGBE) Displays information for each beneficiary.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Pledge Number	Pledge Detail page (bwdkghis.P_ViewPledge_Detail)
Return to Giving History	Giving History page (bwdkghis.P_View_Gifts)

Pledge Detail (bwdkghis.P_ViewPledge_Detail)

The Pledge Detail page displays all information available for the pledge selected. This page is accessed by selecting the active monetary amount link from the pledge list.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
All Existing Pledges	Pledge List Form (AGCPLDG) Displays date, amount, balance, status, pledge type, pledge number, pledge classification 1, 2, 3 code descriptions and comments for all existing pledges
Associated ID	Pledge Associated ID (AGAPASC) Displays Banner ID, Associated Type, Name and Comment for each associated donor.
Allocation	Gift List Form (AGCGIFT) Displays campaign, designation, amount pledged, and amount paid for each allocation
Payment	Pledge/Gift List Form (AGAPPAY) Displays date, gift type, campaign, designation, and amount for each payment
Hard Credit	Pledge Hard Credit ID List Form (AGCPMLT) Displays ID, name, campaign, designation, credit amount, and third party amount for each hard credit.
Soft Credit	Pledge Soft Credit ID List Form (AGCPMMO) Displays ID, name, campaign, designation, credit amount, and third party amount for each soft credit
Installments	Pledge Installment Form (AGAPINS) Displays number, date due, amount due, and amount paid for each installment
Additional Details	Additional Details Form (AGAADTL) Displays type code, pledge number, gift number, and details for each additional detail.

Item	Description/source information
Beneficiaries	Beneficiary Information Form (AGAPGBE) Displays information for each beneficiary.

Updates to Banner

This page does not update information in the Banner database.

Links to other Web pages

This page contains the following links to other Web pages.

Link	Action
Return to Giving History	Giving History page (bwdkghis.P_View_Gifts)

Alternate Names and IDs (bwdkpsrc.P_Alternate_Names)

The Alternate Names and IDs page displays any existing details for alternate names or IDs. This page is display only.

Setup requirements

This page has no setup requirements.

Web page fields

This page contains the following fields.

Item	Description/source information
<i>The following fields apply to the assigned name.</i>	
ID	Advancement Identification Form (APAIDEN)
Name	Advancement Identification Form (APAIDEN)
<i>The following fields apply to the alternate names.</i>	
ID	Advancement Individual/Organization Name Form (APANAME)
Name	Advancement Individual/Organization Name Form (APANAME)
Name Type	Name Type Validation Form (GTVNTYP)

Item	Description/source information
Date	Advancement Individual/Organization Name Form (APANAME)

Updates to Banner

This page does not update information in the Banner database.

Save the Changes (bwdkmove.P_Save_The_Changes)

The Save the Changes page confirms the information updates were saved.

Setup requirements

This page has no setup requirements.

Web page fields

This page does not contain any fields.

Updates to Banner

This page does not update information in the Banner database.

Management of Proposal Records

Banner Advancement Self Service for Advancement Officers allows the management of proposal records for major prospect donors. The user can create and maintain the proposal and project details following the institution policy of selecting the staff details either through the initials as the selection code or by using the Banner ID as the selection code.

When implementing this solution, each institution must review the new rule in *Prospect Proposal Management Rules* setting on the Self Service Advancement Rules Page. The baseline default reflects the prior functionality using the Advancement Officer Banner ID for the selection code. Once the new rule is updated, the related Self Service pages reflect the desired coding selection.

There are three options for the Staff Assignment rule:

1. Staff presents staff records where the staff initials only are used. For example:
 - Alfred B. Carlson – ABC
 - Edgar F. Goodman – EFG

- Harry I. Thomas – HIT
2. Banner ID will present staff records where the Banner ID only are used.
 - Alfred B. Carlson – 123456
 - Edgar F. Goodman – 777777
 - Harry I. Thomas – 112233
 3. Both will present staff both with an ID and initials as stored in the AMRSTAF table for selection when adding additional staff. For example:
 - Alfred B. Carlson – ABC
 - Alfred B. Carlson – 123456
 - Edgar F. Goodman – EFG
 - Edgar F. Goodman – 777777
 - Harry I. Thomas – HIT
 - Harry I. Thomas – 112233

Advancement Officers have the ability to enter or edit proposal records for the major donors assigned as a primary prospect. Creating a new proposal record defaults base information for the user to streamline the record creation. Previously, the Self-Service page would use the Banner ID for the Advancement Officer linked to the base proposal record. Currently, the generation of a new proposal record considers the new rule settings for capturing the associated advancement officer details. Here are the results for each setting.

1. Banner ID – the advancement officer details are saved in the Banner tables using the Banner ID associated with the logged in advancement officer.
2. Staff - the advancement officer details are now saved in the Banner tables using the staff initials associated with the logged in advancement officer.
3. Both - the advancement officer details are saved in the Banner tables using the Banner ID associated with the logged in advancement officer (this approach is the default with both options allowed).

Linking additional staff to associated projects

Advancement Officers adding or maintaining associated projects have the option to link additional staff as needed. The list for the staff selection also considers the new rule setting and presents the eligible staff based on the rule selection for the advancement officer to pull back and save. The list present shows the selection code after the full name description.

The institution can manage the desired record creation that follows the institution's selection rules for the staff assignment details.