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UABANNER.EXE – Client/Server Reports

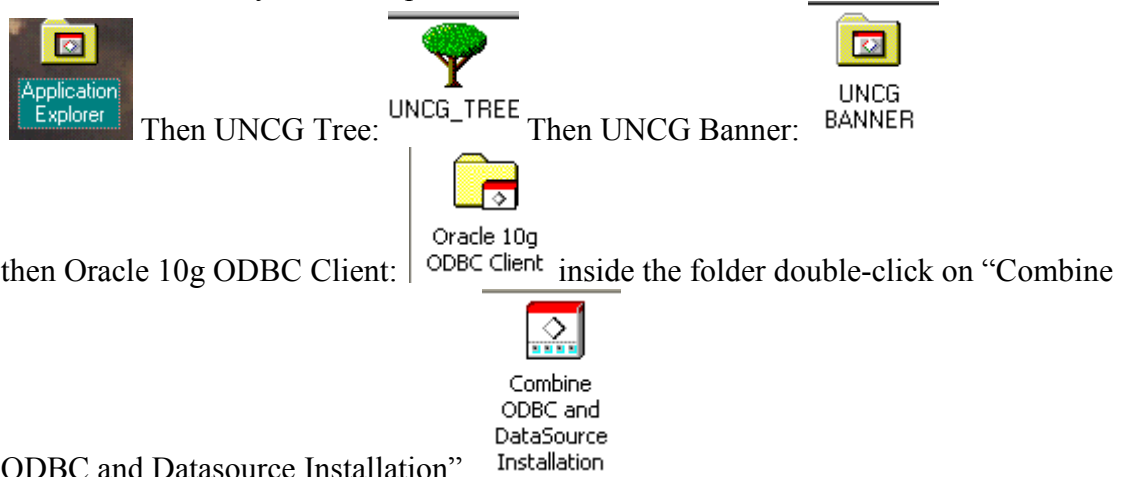
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Brief Description

UABanner.EXE is a client/server application that connects to the Banner database and lets a user run a number of reports and queries. The reports all run interactively and therefore may take some time to execute. Any batch processing is done through SCT’s Banner.

Installing UABanner.EXE

1. If you have not run uabanner on your PC before, you will need to install the oracle drivers. To do this, If your network account is set up correctly, then the first step is to set your pc up for 3rd-party access to the Banner database. Click on “Application Explorer” which should be found on your desktop:



ODBC and Datasource Installation”.

(You may have to restart) If the program does not start running when you click on it, try right-clicking and selecting “verify”. IF YOU DO NOT HAVE A UNCG-BANNER FOLDER, YOUR ACCOUNT HAS NOT BEEN SET UP TO ACCESS BANNER.

2. Click on the “My Computer” icon. Then Click on “my network places” then “UNCG”, then “DEPT”, then “DUR”, then “DUR”, then “DUR_VOL”, then “DUR”, then “apps” and finally “durcs”.
- 3.

\\Uncg_tree\UNCG\DEPT\DUR\DUR_VOL\DUR\apps\durcs

4. The third step is to put the UABanner.EXE icon on your desktop. Right-click on the uabanner.exe icon:

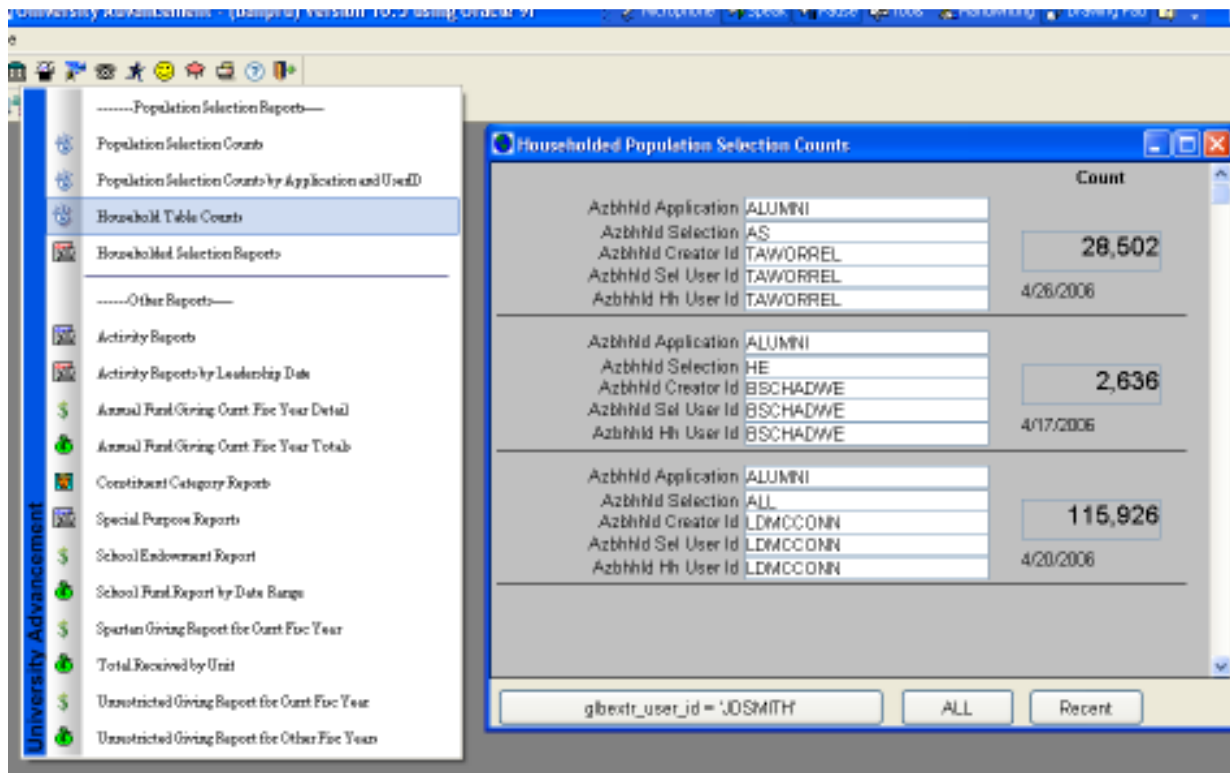


and select “create shortcut”. You’ll get the error message, “You cannot create a shortcut

here, create one on the desktop instead?” and you’ll click “YES!”

Reports that Run From Househoded Populations

To run reports from househoded selections, you may either look up available househoded population selections via “Househoded Table Counts” report under the university-advancement menu, then double-clicking on the popsel you want or you can click on “Househoded Selection Reports” on the same menu and enter the parameters manually.



Next select an output format from the drop-down list and click “OK”

The screenshot shows a Windows-style dialog box titled "Householded Selection Reports". At the top, there are two buttons: "Select From Report" and "Clear User". Below these are five text input fields, each with a label to its left: "Application" (containing "ALUMNI"), "Selection" (containing "WJ"), "Creator" (containing "LAWEAVE2"), "Executer" (containing "LAWEAVE2"), and "Householder" (containing "LAWEAVE2"). At the bottom of the form area is a drop-down menu labeled "Output Format" with "Bio without Gifts" selected. A "Get Report" button is centered below the drop-down menu.

APPLICATION: Always Alumni for a University Advancement user.

SELECTION: This is the selection name the user gave the population selection when creating and running it. Unless it is currently being created, any population selection’s name will be available for lookup by clicking on the values flashlight while this parameter is highlighted. (see looking up selections below)

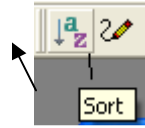
CREATOR: This is the username of the person that created the selection. If the selection was created using an AZP* program, the username will be the same for creator and user.

EXECUTER: This is the username of the person who executed the selection using GLBDATA or the same as 03 if an AZP program was used to create the selection.

HOUSEHOLDER: This is the username of the person who ran AZPHLD to household the selection.


Standard Menu Options


Whenever you execute a report in UABanner you will have a 2 rows of icons on a toolbar. The top row is for defaults and executing additional reports and the 2nd row is specific to the report. You can get a description for each menu item by holding the mouse over the icon.





Typical report menu items are described below:


Application Level:


 University Advancement: Items under this icon are either not specific to a department or were requested by the Vice Chancellor's office.


 Advancement Services: Items under this icon are those requested by the Advancement Services office.

 Alumni Affairs: Items under this icon are those requested by the Alumni Affairs office.


 Annual Programs: Items under this icon are those requested by the Annual Programs Office.

 Development Office: Items under this icon are those requested by the Development Office.

 Spartan Club: Items under this icon are those requested by the Spartan Club Office.

 Tables: Items under this icon are reports listing codes and descriptions for Banner tables.

 Change the Default Printer

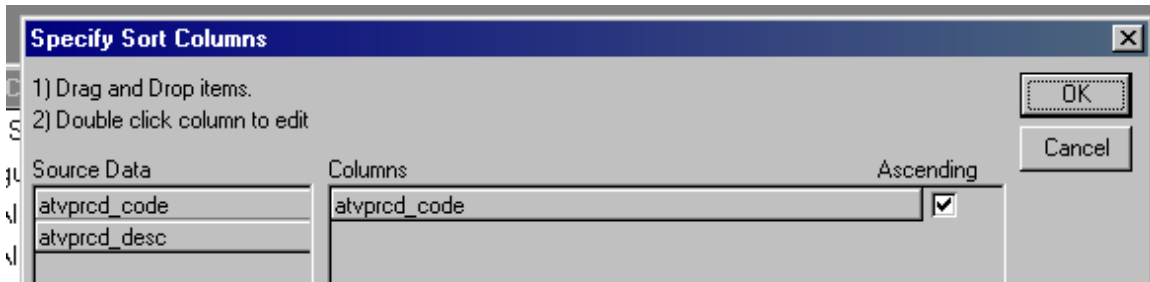
 Exit the application

UABANNER.EXE – Client/Server Reports

Report Level:



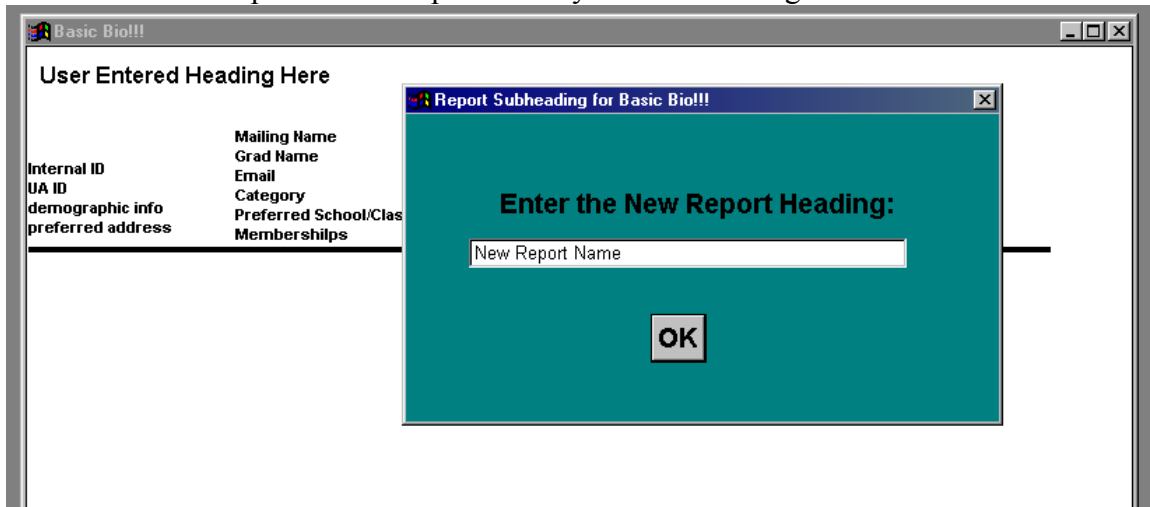
Sort. Use this to sort the rows in your report. It will cause a sort window to pop up:



You change the sort by clicking on an item and dragging it from the source-data column and dropping it in the column on the right.




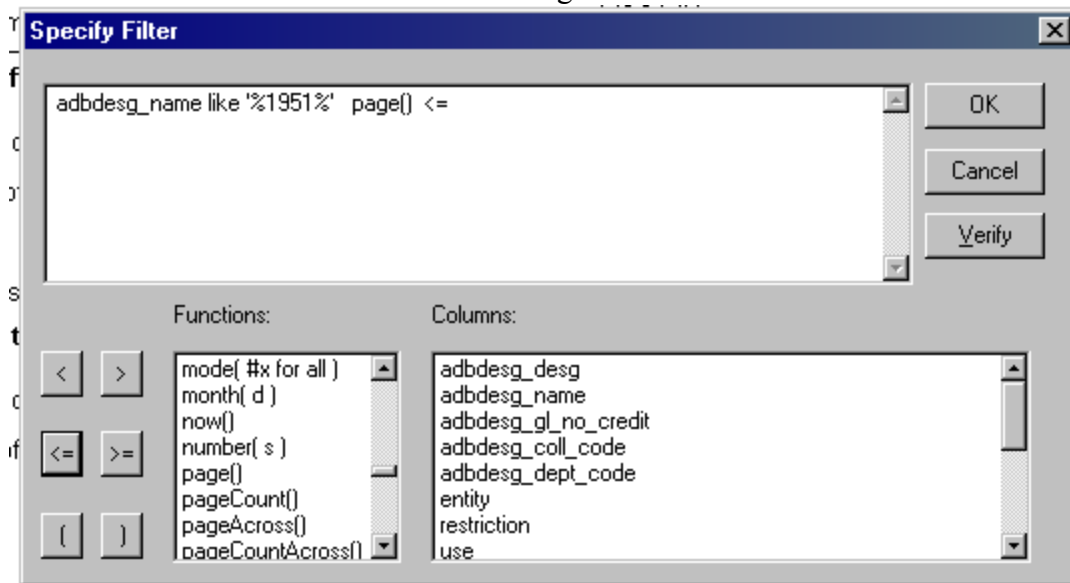
Set Report Heading. Usually report with this option will have “User Entered Report Heading” as the report page heading. Clicking on this icon will bring up a window that will prompt you for a heading to put on the report. Once you click ok, the “User Entered Heading Here” text in the report will be replace with your new heading:



Print the report!


UABANNER.EXE – Client/Server Reports

 Filter the Report: This is used to narrow down the selection in a report. Clicking on this button brings up the Filter Window. You can create filters using any Boolean statement. The column names available are listed on the right and functions on the left.

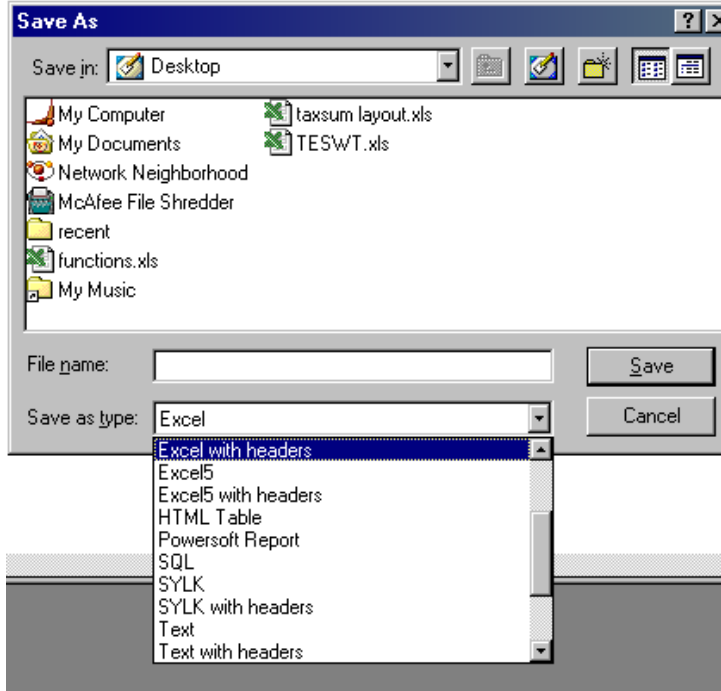


Some examples are:

Page() < 5	(to see only the 1 st 4 pages of a report)
Desc like '%1951%'	(show only rows that have 1951 in the Desc column)
Amount >= 100	(show only rows that have 100 or more in the amount column)

 Save As: Many reports in UABanner can be saved for use outside of the application, to use in excel or as a merge file for example. This option is indicated by the save as icon. Clicking this icon will bring up the save as window:

UABANNER.EXE – Client/Server Reports





Choose a file type and be sure to select a file type with headers if you want column descriptions, especially in a merge file.



Exit the Report

University Advancement Reports

To see a list of reports defined either for the University Advancement Division as a whole or as requested by the Vice Chancellor’s office click on the UA icon:  or Menu item:  The reports that will be listed are briefly described below:

Population Selection Reports

Population Selection Counts	Returns a count for all Population Selections currently available
Population Selection Counts by User and Application	Returns a count for all Population Selections currently available with a specified Application code and created by the specified user
Household Table Counts:	Returns a count for all Population Selections that have been householded. Only population selections that show up here are available in reports, labels, etc. Double clicking on a row in this report will take you to the Household-Selection-Reports menu.
Household Selection Reports:	This brings up a window for entering the Household-Selection Parameters and allows you to retrieve one of the output formats below
<i>Bio with 5 year giving history</i>	List with Name, Address, Demographic Info and all gifts for past 5 years
<i>Bio Without Gifts:</i>	List with Name, Address, Demographic Info
<i>Bio With Gifts:</i>	List with Name, Address, Gifts, Pledges and Demographic Info.
<i>Bio With Gifts and Fiscal Year Total (excludes nondonors)</i>	List with Name, Address, Gifts, Pledges and Demographic Info. + sum of gifts by fiscal year
<i>Bio With SFC Giving History</i>	Bio with Students First Campaign Gift Detail
<i>Class List from AWWHLD</i>	Name, Address, Phone, Class Year, first degree
<i>Class List with Giving</i>	Name, Address, Phone, Class Year, first degree, giving total, most recent gift, most recent pledge, largest gift
<i>Class List Home, Business Giving</i>	Name, Home Address, Phone, Class Year, first degree, Business Address, Business Phone, Giving Info
<i>Class List Plus Calendar Giving Total</i>	Same as above but with calendar year prompt and giving totals
<i>Exclusions List from Original Selection</i>	This report lists all persons in the original popsel who have any exclusion codes. This is a way to check the list of persons removed when householding.
<i>Labels (5660)/Merge File Upper Case</i>	Labels with each address element in a separate field for exporting into excel. This report can also be printed on every 5660 labels. The name and address fields are all in upper-case letters because the Chancellors' office prefers to send them that way to help distinguish her mailings from others.
<i>Lables from AWWHLD (5660)</i>	Name and address in Avery 5660 Label format
<i>Labels from AWWHLD with Minimum Activity Date</i>	Allows user to send a list to persons in a householded selection who have had a recent address update
<i>Row Count, Donor Count, and \$Total by FY</i>	This report list statistics on the householded selection but no detail
<i>User Defined Merge File</i>	Merge file with field groups selected by the user

UABANNER.EXE – Client/Server Reports

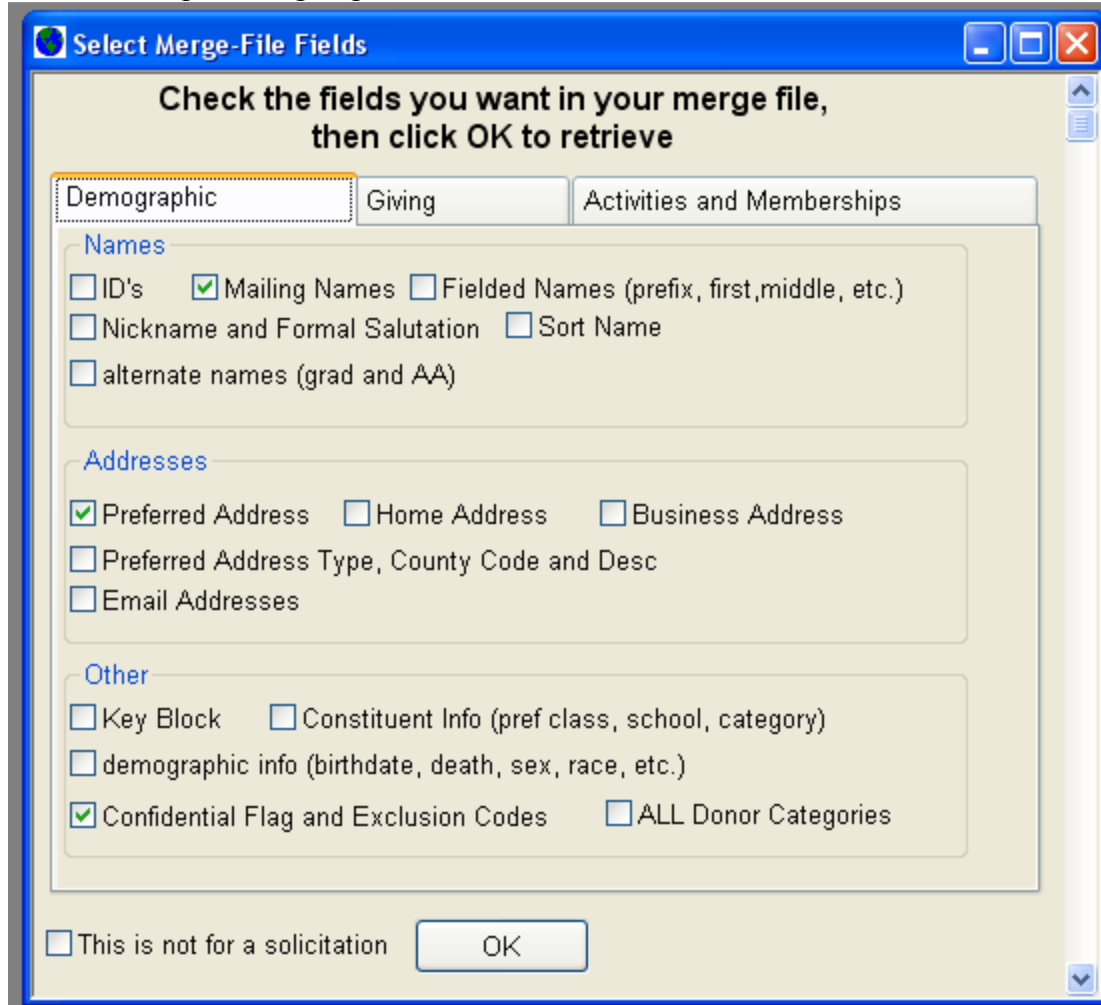
Other Reports:

Activity Reports	1 X 2 5/8 Inch Labels or a Directory-Style Report, user is prompted for Activity Code and Activity Year
Activity Report Listing All Years and Leadership	Additional Details about the Activity
Activity Reports by Leadership Date	1 X 2 5/8 Inch Labels or a Directory-Style Report, user is prompted for Activity Code, Activity Leadership Code, and Activity Date
Annual Fund Current Fiscal Year Detail	Static Report no Prompts
Annual Fund Current Fiscal Year Totals	Static Report no Prompts
Constituent Category Reports	Variety of output formats available for selection based on Constituent Category. Created for pulling retirees.
Special Purpose Reports	1 X 2 5/8 Inch Labels or a Directory-Style Report, user is prompted for Special Purpose Type and Code
School Endowment Report	Subtotals for designations grouped by school, user is prompted for several restrictions and a fiscal year
School Fund Report by Date Range	Same as above by by date range rather than fiscal year
Spartan Giving Report for Current Fiscal Year	Spartan Designation Totals for the Current Fiscal Year
Spartan Giving Report for Any Fiscal Year	Spartan Designation Totals for Fiscal Year Entered
Total Received by Unit	Total Dollars received by each Unit (College)
Unrestricted Giving Report for Current Fiscal Year	Lists Giving and Projected Totals for all unrestricted accounts
Unrestricted Giving Report for Prompted Fiscal Year	Lists Giving and Projected Totals for User Specified Fiscal Year

User Defined Merge File

Demographic Fields

The user defined merge file allows you to specify field groups you want to include by checking a box next to the description. (See the index at the end of this section for more detail on the specified groups.)



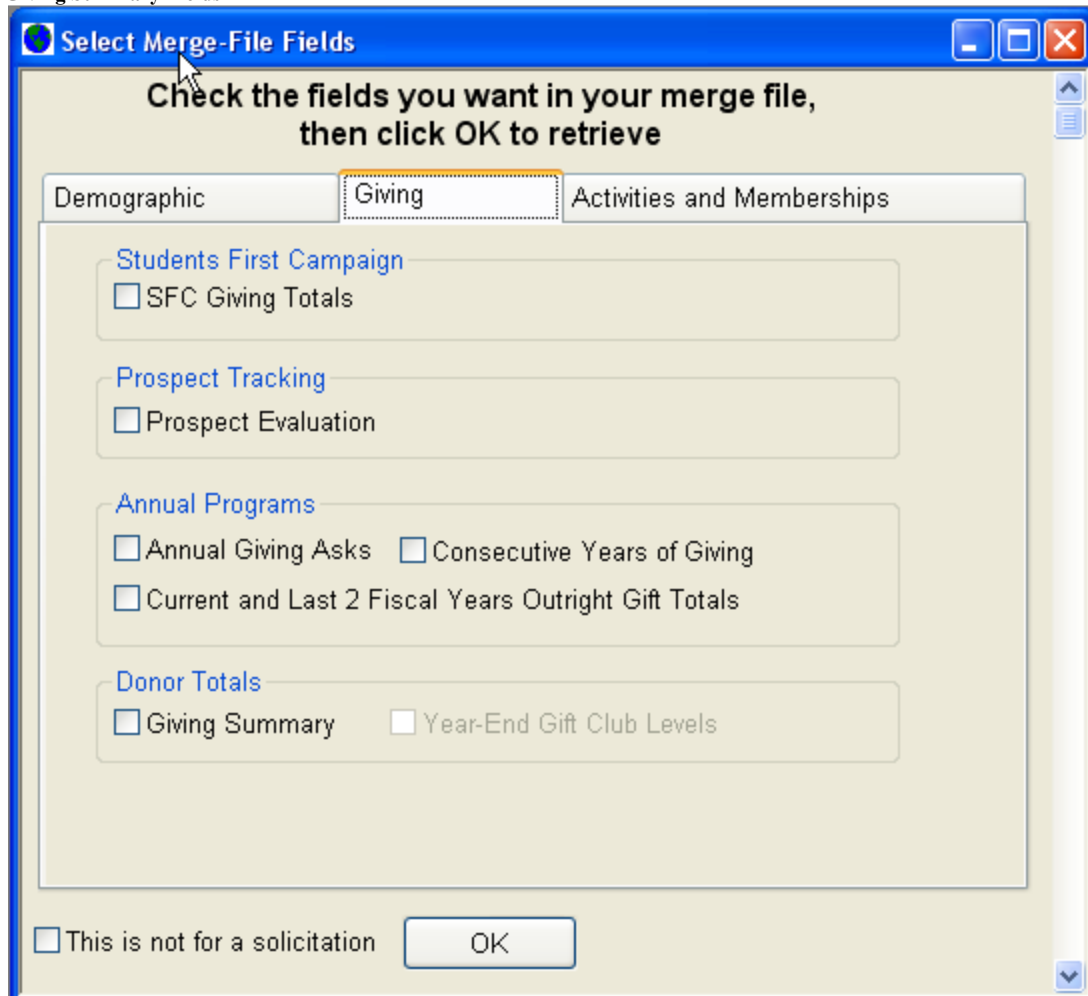
- ID's:** University ID Numbers
- Mailing Names:** Prefix First Middle Last Suffix all in one field such as: "Mr. James D. Smith"
- Fielded Names:** Prefix, First, Middle, Last, Suffix separated into separate fields
Such as "Mr.", "James", "David", "Smith", "III"
- Nickname and Formal Salutation:** First Name or Nickname and Prefix + Last Name
- Sort Name:** Full name formatted for sorting, such as "SMITH JAMES D"
- Alternate Names:** Name at graduation (usually same as birth name), alumni affairs name = First + birth last name if different from current + current last name
- Preferred Address:** all of the fields for the address of the type specified by the constituent as the one at which the constituent prefers to receive mail
- Home Address:** all of the fields for the constituent's home address

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- Business Address:** all of the fields for the constituent’s business address
- Preferred Address Type, County Code and Description:** Redundant if you used preferred address, but the preferred address type will be the address type for the address the constituent prefers be used for mailing. (Home, Business, Seasonal, etc.) The county code as in “GUIL”, “Guilford”.
- Email Addresses** Preferred email address for constituent and spouse
- Key Block:** Internal ID, Population Selection Fields
- Constituent Info:** Preferred Class Year, Preferred School (College), Category (Friend, Alumni, Staff etc.)
- Demographic Info:** Birthdate, sex, citizenship, race, etc.
- Confidential Flag and Exclusions:** Confidential Flag = Y if constituent’s records are marked confidential. Exclusions field contains all exclusion codes for the constituent, if any (ALL – Do not Contact, AMS – Do Not Solicit by Mail, etc.)
- All Donor Categories:** Donor Categories, such as ‘Alumni’, ‘Faculty or Staff’, ‘Governing Board Member’, etc...

Click on the Tabs to see the various groups of field categories that can be included.

Giving Summary Fields



SFC Giving Totals: Total Received, Pledged, Memo and Planned for the current campaign.

Prospect Evaluation: As defined by development office: Staff Identification Codes, Pipeline, Rating/Interest for ID and Spouse

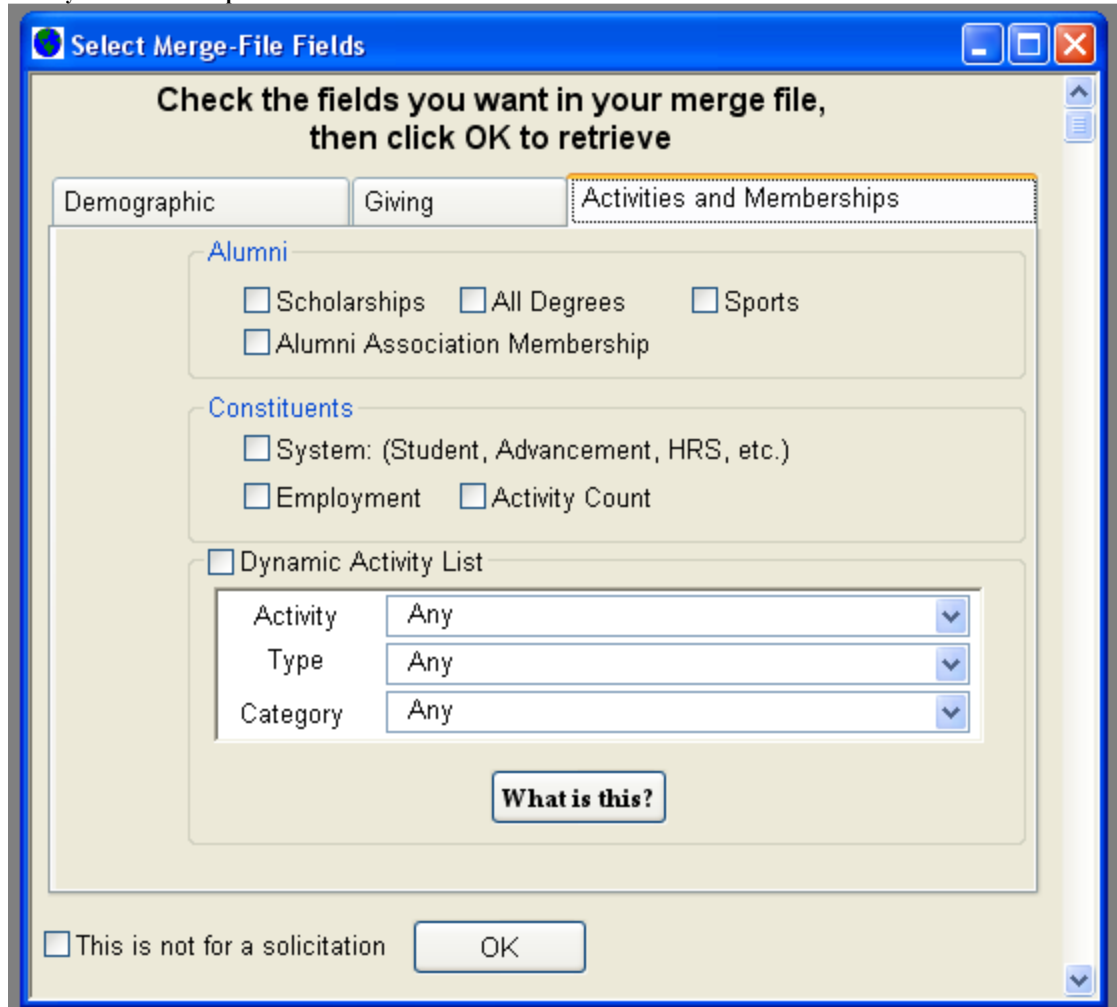
Annual Giving Asks: Based on last gift and donor group assigned by annual programs office

Consecutive Years of Giving: Self explanatory

Current and Last 2 Fiscal Years Outright Gift Totals: Self explanatory

Giving Summary: Life giving total, memo total, last gift, largest gift, etc.

Activity and Membership Fields



Scholarships: Scholarships received by the constituent

All Degrees: Short description of all degrees, such as
“BS BE ISOM 1993, MBA BE BUSI 1997”

Sport: Sport Played by a former student athlete

Alumni Association Membership: Current Membership Status

System: Flags to indicate if the person is in one or all of the following systems:
Advancement, Student, Finance, HRS, and Accounts Receivable as well as
date created and create user.

Employment: name and address of employer. May be from id if the employer
exists in the Advancement database or may be text. This may
cause duplicate rows if a person has more than 1 active and
primary employer

Activity Count: Number of Activities associated with the constituent

Dynamic Activity List: List All activities and years of participation for the constituent.
Since the list can be quite large, the types included can be limited by
activity, type, and/or category.

Advancement Services Reports

Batch Reports by User and Session Number:

These are intended to be run by Advancement Services employees only. They are for reviewing transactions entered in a specific batch.

Batch Adjustments Report – List Adjustments for specified user and batch

Batch Dues Adjustments Report – List Dues Adjustments for specified user and batch

Batch Dues Report – List Dues Records for specified user and batch

Batch Report (by donor name)– List Gifts for Specified user and batch

Batch Report (by gift number)– List Gifts for Specified user and batch

Get All Names by ID's – Lists all existing names for 2 ID's provided

Get ID and Name by Email – find a person by his or her email address

Get ID and Name by PIDM – find a person by his or her banner internal id number

Get PIDM from ID

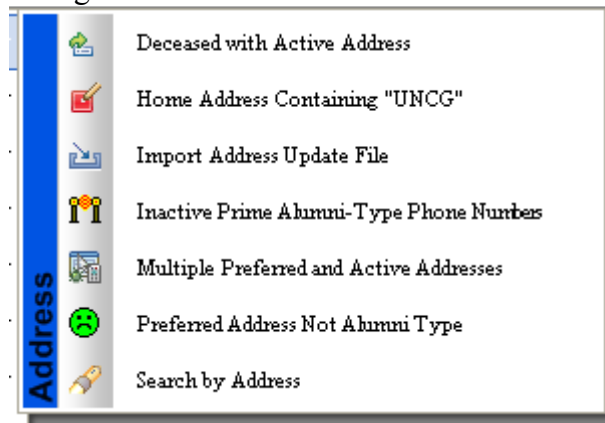
External Pledges Grouped by Batch – for reviewing web pledges and telefund pledges

Data Maintenance

Data Maintenance reports are for identifying erroneous data that is already in the database, proofing data, and monitoring the results of automatic updating processes.

Address Reports:

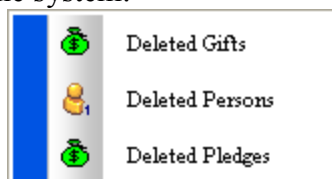
These reports include error and inconsistency reports as well as a search report for use when a person is receiving multiple mailings (search by address). This may help find that multiple ids have been assigned to one address.



Search by Address – This report allows for searching by address using wild cards. It is used when a person reports receiving multiple mailings and will let us know all entities associated with the address.

Backup of Deleted PIDM Reports

These reports list saved copies of select data that has been deleted from Banner in an attempt to clean duplicates off the system:

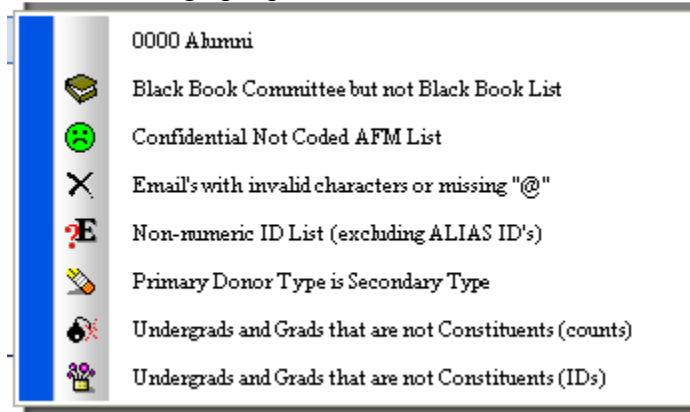


Campaign Validation

These reports show missing or duplicate codes and data that effect campaign reporting.

Constituent Errors

These are errors related to setting up a person's record in Banner Advancement.



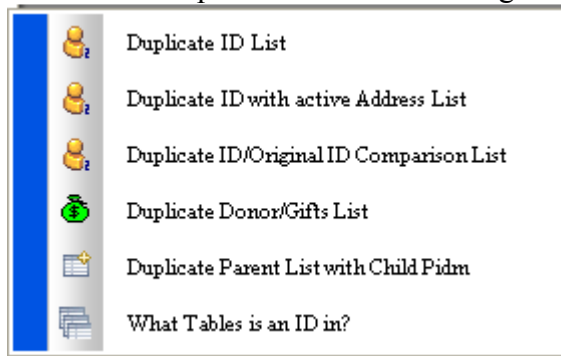
Confidential Not Coded AFM List

To prevent misunderstandings with persons coded confidential, all confidential persons are coded with an exclusion code: AFM, so they will not receive any affiliate mailings. This report lists persons who are coded confidential, but have not been coded with the AFM exclusion code.

Duplicate Reports

These reports are used to identify and or clean up duplicate records in Banner.

Duplicate ID List and *Duplicate ID with active Address List* are used to identify possible duplicate records. *Duplicate ID/Original ID Comparison List* runs to bio's side by side on 2 different pidms – this is used to compare data before deleting one of the pidms.



Duplicate Donor/Gifts List – identify donor records that are duplicates because data from one ID has been migrated to a second ID, but the bad id has not been deleted.

Duplicate Parent List with Child Pidm – Children records with multiple parent records.

What Tables is an ID in? Search all banner tables for a specified id.

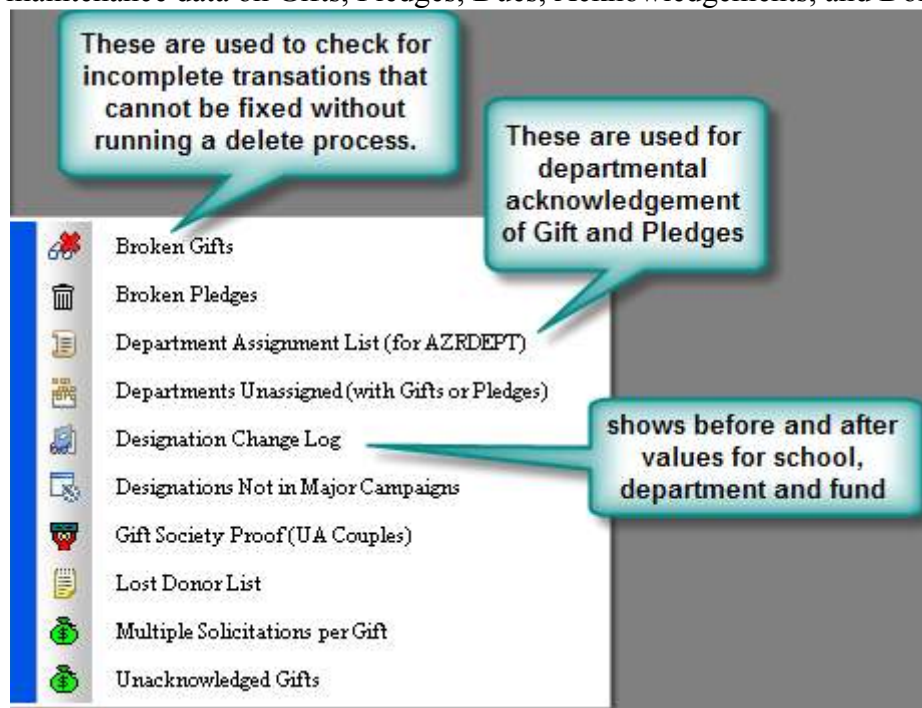
Employee Reports

Retired Employees not coded RFST

Terminated Employees who are constituents

Giving/Acknowledgement

These reports are designed to report errors, code assignments, missing codes, and other errors or maintenance data on Gifts, Pledges, Dues, Acknowledgements, and Donors.



Broken Gifts and Broken Pledges

Broken gifts and broken pledges are caused by a Banner system error that results in incomplete information being written to the database about a gift. 90% of the time this results in a base record without a campaign and designation record. The broken-gifts and broken-pledges reports report on gifts that are not in the gift-and-pledge-reporting view. These gifts and pledges are either missing detail records or the donor is not fully set up as a constituent.

Department Assignment List and Departments Unassigned

These reports list assignments and missing assignments of departments to a person who will receive the emailed departmental-acknowledgement reports.

Gift Society Proof

The Gift-Society program in Banner sometimes does not correctly assign couples to the same society.

Lost Donor List

Reports on recent donors who do not have an active address

Multiple Solicitations per Gift

System allows multiple, but UNCG's policy is not to have multiple records

Unacknowledged Gifts

When department acknowledgement reports are run in banner an acknowledgement code is written to the acknowledgement table in Banner. This report list gifts that do not have a record in that table.

Name Reports

These reports are mostly for catching errors or inconsistent data involving a constituent's name:

First or Last Name with Parentheses

Middle Name = Last Name

Prefix Errors

Prefix vs Salutation

Prefix vs Suffix

Unknown Name

Spouse Reports

These reports are mostly for catching errors on inconsistent data involving a married couple's records:

Different Home Phones

Lost Spouse Married to Active Spouse

Multiple Active Spouse Records – person has more than one active spouse record

Spouse – Unreciprocated Spouse Form

Spouse – Unreciprocated XREF

Spouse – Xref vs Spouse Form (No Spouse Record)

Spouse – Xref vx Spouse Form (No Xref)

Spouse with Newer Address

Other Data Maintenance Reports:



Deceased List



Honorary Degree List



Update Counts by Username

Receipts and Pledge Reports



Donors with 3 or 6 Payroll Deduction Pledges

Donors whose installment schedules must be customized because they are splitting a payment 3 ways



Employee Gift Fund Receipts

Gets receipts for gifts to the Employee Gift Fund (coded as a type of dues payment)



Honor/Memory Donor List by Honoree and Session End Date

To provide a list of donors by Honoree keyed since a certain date



Honor/Memory Donor List with Designation by Honoree and Session End Date

Same as above, but with additional information.



Pledge Aging from AWWPINS

Spreadsheet format report with all pledges that are not type 'TE' and have a payment schedule and an outstanding balance



Pledge Aging with Address

Same as above but with donor's address fields added



Pledge Aging with All Designation Table Fields

Same as above, but contains all designation related fields



Pledge Reminders :

Print pledge reminder letters by payment due date with a report



Pledge Reminders Merge File

Same as above but in spreadsheet format suitable for a mail merge



Pledges with Duplicates

Donor has multiple unpaid pledges to the same designation



Pledges with Gifts to Same Desg

Gifts that should probably be pledge payments



Receipts by Session End Date

Gift Receipts, saved as merge data file

Receipts by Entry Date Range

Receipts by Entry Date Range

(intended to replace receipts by Session End Date) .

This is a report for use as a merge file for creating receipts. Gift list is pulled by gift-entry date. Payroll and Bankdraft gifts are excluded. Gifts from donors who have an exclusion code "REC" (Do Not Receipt) are also excluded. Gifts that have an associated ID with association type "THON" (Third-Party Given on Behalf of) are switched so that the credited party is shown as the donor and the gift-giving party is shown as the third party donor. The third party donor is displayed as "Given on the donor's behalf by" followed by the name. See the example below with the donor's names and addresses blurred out.

Receipts

Receipts with Session End Date between 05/01/09 - 06/01/09

<u>Donor(s)</u>	<u>Gift Total/Detail</u>	<u>Honor/Memory Info</u>
Mr. Irving Cohen Mrs. Irene Cohen 1700 Private Blvd Rd Greensboro NC 27408-3222 Banner ID: 886004723	Gift Total: \$200.00 0325008 \$200.00 05/05/09 Henry Samuel Levinson Program Endowment in Jewish Studies	*HONOR Dr. Henry S. Levinson
Given on the donor's behalf by: Jewish Foundation of Greensboro		
Mr. Michael F. Curley Mrs. Ann Curley 376 Delwood Dr Punta Gorda FL 33950 Banner ID: 884155141	Gift Total: \$200.00 0325272 \$200.00 05/12/09 Class of 1965 Scholarship Income Fund	
Given on the donor's behalf by: Fidelity Charitable Gift Fund		
Mrs. Kate Curley	Gift Total: \$200.00	

Page 3 of 8 *Do Not Receipt, Payroll, and Bankdraft Gifts are excluded.

\$100+
\$1,000+
Honor/Memory
All
\$15,000+
Bio's



Vice Chancellor/Chancellor Receipts by Entry Date

(intended to replace VC Receipts by Session End Date)

This is a report for use as a report and merge file for creating receipts.

- Gift list is pulled by gift-entry date.
- Payroll and Bankdraft gifts are excluded.
- Gifts from donors who have an exclusion code “REC” (Do Not Receipt) are **NOT** excluded.
- A Vice Chancellor/Chancellor letter exclusion code indicator is included, but those gifts are **NOT** excluded from this list. (code VCC on exclusions form.)
- Gifts that have an associated ID with association type “THON” (Third-Party Given on Behalf of) are switched so that the credited party is shown as the donor and the gift-giving party is shown as the third party donor. The third party donor is displayed as “Given on the donor’s behalf by” followed by the name.
- Buttons at the bottom of this report are used to filter the data or run bios. Included is a button labeled “Excl VCC” which will remove gifts from the list where the donor is coded with an exclusion code “VCC” (Do not send VC or Chancellor letters)
- The standard report buttons at the top allow custom filters or sorts to be entered.



VC Receipts by Session End Date

VC Receipts by Session End Date (no 1st time info)


Gift Receipt Info in merge format and filterable for minimum amounts

VC Receipts by Session-End Date – Gift Receipts, saved as merge data file with extra fields for the VC letter


VC Receipts by Session-End Date (no first-time gift info) – Gift Receipts, saved as merge data file with extra fields for the VC letter – checking to see if gift was first gift slows performance time

Stewardship Reports


These reports are per the Stewardship Coordinator's Specifications

 Endowment Contact List by Designation with Address


Designation Contacts

 Endowment Contact List by Designation (Grad Only)


Same as above, but only for Grad School funds.

 Endowment Contact List (one row per contact/scholarship)


Endowment Contacts with name, address, etc. and recipients merged into a list

 Endowment Recipient List (one row per recipient/scholarship)


Scholarship Recipients with contacts merged into a list

 Endowment Contact and Recipient List (one row per person)


Endowment Contacts and Scholarship recipients each in separate row.

 Stewardship Report

Stewardship Report – For All Designations

 Stewardship Report 2


Stewardship Report 2 –

 Stewardship Report by Staff


Stewardship Report by Staff – for all designations with prompted person associated with the designation

Transaction Reports Detailed


These reports are for reviewing information based on the dates it was entered into Banner and contain both summary and detail information.

 Address Updates by User and Date


Prints all addresses updated by the specified user in the specified date range

 Departments Transaction Report with Adjustments


prints transactions over a user-specified date range, grouped by department – including transactions that are modifications (Adjustments are gift or pledge modifications, which means the gift may have been actually made outside the transaction date). The adjustment detail is included below adjustment gifts. Memo records and associated constituents are also listed below the relevant transaction.

 Departments Transaction Report


prints transactions over a user-specified date range, grouped by department – excluding transactions that are modifications. Memo records and associated constituents are also listed below the relevant transaction.

 Gifts Only by Min Amount Date Grouped by Payment Type

for finding large gifts by payment type

 Gifts with WEB Solicitation Code

WEB solicitation code is automatically assigned to all gifts that come from the web.

 Matching Claims List

Expected matching gifts

UABANNER.EXE – Client/Server Reports

Memo Gift List by Campaign and/or Date

Memo Gift List by Campaign and/or Date

This report lists gifts, designations, gift amounts, credit amounts, 3pp amounts, gift number, donor, donor id, credit recipient, and association type for gifts with associated memo credit records.

Prompts are for Campaign and date range. “Any” in response to the campaign prompt will pull all campaigns for the date range.

Month End Adjustments Report by Entry Date (FOAP)

Adjustment Details by Date Range, excluding adjustments to gifts with gift dates less than the user specified date range

Month End All Adjustments by Entry Date 2


Adjustment Details for all adjustments entered during the user-specified date range

Month End All Adjustments by Entry Date Exclude by User


Month End All Adjustments by Entry Date Include by User

Subsets of reports above


Transaction Reports Detailed (continued)

 Name Updates by User and Minimum Date


For auditing name updates

 Transactions by Dues Number


for auditing purposes, this provided session, adjustment, and user info for a dues number

 Transactions by Gift Number


for auditing purposes, this provided session, adjustment, and user info for a giving pledge, gift, or dues number

 Transaction Dues Report by Entry Date


Details Dues Report by Date Entered

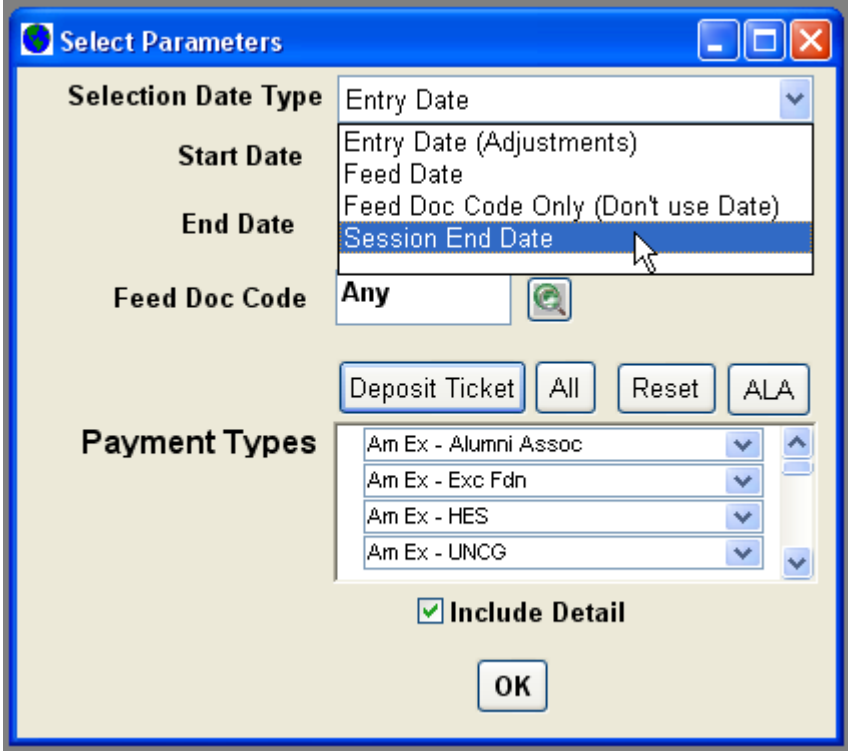
 Transaction Dues Exportable Detail by Gift Entry Date

Same as above, but with all detail on each row and exportable into excel

 Transaction Report by Session End Date Range (FOAP)

gift transactions over user-specified date range

 Transaction Reports (Various)



Select Parameters

Selection Date Type Entry Date

Start Date Entry Date (Adjustments)
Feed Date
Feed Doc Code Only (Don't use Date)
Session End Date

End Date Session End Date

Feed Doc Code Any

Deposit Ticket All Reset ALA

Payment Types

Am Ex - Alumni Assoc
Am Ex - Exc Fdn
Am Ex - HES
Am Ex - UNCG

Include Detail

OK

Rather than a long list of transaction reports. This menu lets you select what to include and what to select the transactions by. Note: Adjustment reports must be pulled by “Entry Date (Adjustments)” because this is a date kept separate from the entry date of the gift.

UABANNER.EXE – Client/Server Reports

Likewise adjustments have a feed date and feed doc code that is separate from the feed date and feed doc code for the associated gift.

Summary Info Only Transaction Reports

Entity Breakdown by Entry Date Range

Breakdown amounts received by person or organization entity type: Alumni, Staff etc. It includes detail and summary for adjustments made within the specified date range where the gift date is prior to the specified date range.

Entity Breakdown by Session End Date

Breakdown amounts received by person or organization entity type: Alumni, Staff etc. It includes detail and summary for adjustments made within the specified date range where the gift date is prior to the specified date range.

Entity Breakdown by Session End Date - No Adjustments

Breakdown amounts received by person or organization entity type: Alumni, Staff etc.

Entity Breakdown by Session End Date (UNCG Check, Cash or CC Only)

Same as above limited by payment type

Entity Breakdown by Session End Date and Fund Code (Like)

Same as above with parameter for Fund Code

Entity Breakdown by Session End Date and Gift Code

Same as above for specific gift codes

Month End Adjustments Summary by Entry Date

Adjustments Totals

Month End AP Charge Totals

Totals were AP charges to be calculated against gifts

Special Purpose Counts by Donor Category

Transaction Summary Dues Report by Entry Date

Dues Totals

Transaction Summary by Session End Date Range (FOAP)

Gifts Totals

Transaction Report by Session End Date Range (FOAP Totals)

More detail

UABANNER.EXE – Client/Server Reports



VSE Category Counts by Status

Counts for balancing with VSE Report in Banner

UABANNER.EXE – Client/Server Reports

Summary Info Only



WSE Code Subtotals by Fiscal Year

totals for vse balancing Transaction Reports (continued)

Year-End Counts

transactions counts for annual reporting

SFC1 Data

Student's First Campaign related reports

SFC1 by Donor Type

SFC1 by \$Total Descending

See also Campaign Reports under Development Office Reports

Alumni Affairs Reports



Alumni Counts by County

Number of Alumni by State and Count, exportable



ALA Membership Receipts/Counts by Date Range



Class Counts Report with Giving for Last 5 Fiscal Years

Demographic Breakdown that may be further restricted before retrieving



Class Counts Report with Giving By Specified Calendar Year

same as above but giving is listed for calendar instead of fiscal year



Class Notes/Comments from Web

This report lists comments and class-notes submissions submitted via Web-for-Alumni and alumni clippings keyed by AVS staff.



Contact Restriction Class List

Lists persons for a specified class year that have a specified contact restriction



Degree Lists

create a list of degree recipients with degree info, name and address. Formats include a list by degree (person is on the list twice if they got 2 degrees that are selected) or list by person (person is on the list once no matter how many degrees they received)



Dues Acknowledgements

Prompts for Entry Date and Dues Date (to eliminate historical dues records that may have been recently keyed or updated)



Dues Counts and Totals by Date Range

Mainly for auditing purposes, but subtotal dues by interest within the specified date range.



Interest Group Additions by Activity Date

For following up with people who indicate an interest via the web



Life Members with Multiple Memberships

Multiple Constituent Groups



One in a Million Members with Multiple Mbrshps

Multiple Constituent Groups



Renewals by Expiration Date

Annual Programs Reports

Annual Fund Reports:



Annual Fund \$Totals and Counts

This report contains 4 subreports. (note primary donor type is determined by the highest ranking donor type assigned to the constituent)

1. “Annual Fund” contains fiscal code, primary donor type, and dollar total. The data is from fiscal years after 2000 and for gifts with solicitor organization code ‘AP’ (Annual Programs)
2. “Number of Alumni” contains a count of constituent records where the preferred class year is greater than 0001 and the constituent is not marked deceased. (constituents who are not alumni have a preferred class year of “0000”)
3. For all gifts with fiscal year greater than 2000 and solicitor organization code = ‘AP’ show average amount for each fiscal year.
4. Count Number of donors grouped by fiscal year and then primary donor code for all gifts with solicitor organization = ‘AP’ and fiscal year greater than 2000



Annual Fund Gift/Payment Totals Unrestricted vs Restricted by Fiscal Yr

Solicitor Organization = "AP" and Designation Group = "UNR" for unrestricted (other funds, such as “the Chancellor’s New Venture Fund” are considered unrestricted, but are not counted unrestricted in this case because they have not been put in the “UNR” group by the APG office. This report provides subtotals by fiscal year and designation type.



Annual Fund Gifts, Payments, Pledges by FY, Solicitation and Designation

Same as above, but breaks down further by designation and solicitation



Annual Fund Gifts, Payments, Pledges by FY, and Solicitation

Same as above but does not split solicitation totals by designation



Giving Total by Date Range, Sol Org, and Solicitation



School Fund Report with Gifts and Pledges < \$15k

School Fund Report excluding major gifts

CampusCall



Banner to CampusCall Load File 2



Banner to CampusCall Load File 3

From householded selection creates file for loading data into campus call (number equals versions)



Banner to CampusCall Student Load File

for loading student popsels into banner.



Calling Sheets from AWWHLD

for calling from paper, primarily in use for when CampusCall is unavailable or volunteers are given calling sheets



Designation Load File

For loading designation codes and descriptions into CampusCall

Donor and Retained Donor Counts and Totals



Donor and Retained Donor Count by FY and Max Amt

Parameters: fiscal year one, fiscal year two, and max amount. Reports Number of donors in fiscal year provided, and number of donors in fiscal year provided who also gave in previous fiscal year. Donors' gifts must be less than or equal to the maximum amount specified to qualify.



Donor and Retained Donor Count by FY and Max Amt (Alumni Only)

Same as about but donor must have an alumni-type donor category code (Alumni, Graduate Alumni or Alumni Spouse)



Donor Count and \$Total by FY and Max Amount

Distinct number of donors giving a gift less than or equal to the maximum amount specified in the specified fiscal year. Sum of gifts less than or equal to the amount specified.



Donor Count and \$Total by FY and Max Amount (Alumni Only)

Same as above, but donor must have an alumni type category code (Alumni, Graduate Alumni or Alumni Spouse)



Donor Count and \$Total by FY and Max Amount (ALUG or ALGR only)

Same as above, but donor must be an Alumni (does not include giving from alumni spouses)



Donor Count and \$Total by FY and Max Amount (Primary Donor Catg)

Sames as above but grouped by primary donor category (alumni spouse = friend)



Donor Count by Solicitor Org and Solicitation Selected by Date Range

Counts number of donors grouped by solicitation (gifts or payments)



Donor Count (Pledges) by Solicitor Org and Solicitation Selected by Date Range

Counts number of donors grouped by solicitation (pledges)



Dues Payor/Donor Percentages

Fiscal years 2000+ counts of dues payors who are also donors



First Time AF-Type-Solicitor-Org Donor Report

Persons who gave for the first time an AF-type solicitor organization type gift in the specified fiscal year, less than or equal to the specified amount, and within the specified date range.



First Time Donor Report

Same as above, but not restricted by solicitation



First Time Donor Report - Grid, Gifts Only, Per Gift

Same as above but in excel format

Donor and Retained Donor Counts and Totals (continued)



School Totals, Counts and New Donors by Solic Code

College Code, Number of Donors, Number of New Donors, \$total where solicitor code = 'AP' and solicitation code = code specified



School Totals from AP/All Donors

Dollar Totals by School, designation type, and designation for date range specified (solicitor AP)



School Totals from AP/UGrad Alumni

Same as above, but only includes totals if donor is Undergraduate Alumni



Special Purpose Group Class Counts

Counts by class for a specified special purpose group. Intended use is for determining how to best split a group by class year ranges.



Special Purpose Group Donor Counts

Donor counts by calling group

Pledges



Annual Programs Pledge Aging Report

Pledge Aging report show all outstanding pledges with amounts due or past due, including amounts paid. Only pledges with pledge type = 'TE' and an amount outstanding are included.



Pledge Fulfillment Counts by Fiscal Year

Number of Pledges receiving payments in current and past fiscal years



Pledge Reminder by Pledge Date for 1 Payment Pledges

Selects based on supplied pledge-date range. Only includes pledges where installment amount due = pledge amount.



Pledge Reminder by Installment Date for Multiple Payment Pledges

Selects based on installment-due-date range. Does not include pledges where installment amount due = pledge amount.



Pledge Reminder (Last Chance Letter)

Selects based on payment due date.

UABANNER.EXE – Client/Server Reports

Solicitations

AF Solicited Due/Received Totals Unrestricted vs Restricted by Fiscal Yr

Totals for unrestricted versus restricted designation amounts due and amounts received by fiscal year

AF Solicitation Gifts by Date Range

List gifts solicited by AP solicitor org within the date range specified at run time, and with the solicitation codes specified at run time

AF Solicitor Org Gift Totals by Donor Coll Code and Date

Gift lists by donor preferred school and designation type, designation and date

AF Solicitor Org Type Special Purpose Crosstab

Fiscal 2005 Gifts and Donor Counts by Solicitation Code where donors are in special purpose groups
apg/ap052 – apg/ap056

Other Solicitor Org AP UN AP EX Gifts

Lists gifts to AP UN and AP EX where the solicitor is not AP

TEL Donor and NonDonor Counts and \$Totals

Totals and Counts for gifts from previous donors and first time donors

TEL Monthly List by Fiscal Year

Dollars received from solicitation “TEL” each month in a specified fiscal year

Standard Annual Fund Exclusion List

Lists all people who are coded to be excluded from standard-annual-fund solicitation
Modified to accept any number of exclusion codes from the exclusion codes list
Displays whether persons with said exclusions codes have been AP UN or AP EX donors

Director



Giving Total by Date Range, Sol Org, and Solicitation

Subtotals by solicitation method



Gifts Payments Totals by Solicitation Code and FY and Max Amt

Subtotals by solicitation, fiscal year, and maximum amount



Totals by Solicitation Code and FY and Max Amt

Subtotals by solicitation, fiscal year, and maximum amount

Development Office Reports

Campaign Reports



SFC1 Donor List by Minimum Amount

Print a donor list by total



SFC1 Gift and Pledge List by Imperative, School, Dept, etc.

For selecting detail by campaign category



SFC1/SFC2 Donor List by Minimum Amount

Print a campaign donor list by total including planned giving



SFC1/SFC2 Donor List by Minimum Amount (including memo amts)

Print a campaign donor list by total including memo credit and planned giving



SFC1/SFC2 Donor List by Minimum Amount (including memo and detail)

Same as above, but with additional detail about the gifts.



SFC1 Gift and Pledge List by Imperative, School, Dept, etc.

Gift and Pledge list that only pulls SFC1 gifts and has parameters for user to specify School, Dept, Imperative, data range, min amt, etc.



SFC1/SFC2 Total

displays received total for SFC1 & SFC2



SFC1/SFC2 Totals by School, Imperative and Designation

Subtotals for campaign



SFC2 Planned Giving

Subtotal for planned giving

Development Report



Development Report Validation from AZBHHL

lists members of a popsel along with any honorary giving links



Development Report Names List from AZBHHL

lists names, class years, deceased indicator and sort name for couples in a householded population selection



Donor Count by Class Year for Specified Calendar Year

standard demographic counts grouped by preferred class year, with giving totals calculated only on the user-supplied calendar year



Donor Counts and Membership Counts by School

Same as above but by school


UABANNER.EXE – Client/Server Reports

Gift Society Lists

Allows user to pull two different reports based on gift-club type and gift-club code – A short list (can be saved as merge-file) that contains name and address etc or a long list that contains all of the information needed to proof the gift club membership (this version takes a long time to retrieve)

HES Development List by Calendar (Combined)

retrieves a list of the names, grouped by household, of all donors to **HES Foundation designations or HES School designations** within the specified calendar year. A total is included. This total may be used to group the list by giving levels.

 **HES Fdn Development List by Calendar** retrieves a list of the names, grouped by household, of all donors to **HES Foundation designations** within the specified calendar year. A total is included. This total may be used to group the list by giving levels.

HES School Development List by Calendar

retrieves a list of the names, grouped by household, of all donors to **HES School designations** within the specified calendar year. A total is included. This total may be used to group the list by giving levels.

Unbroken Band List

same as gift-society lists, but does not household

Unbroken Band List by Minimum Activity Date

Same as above but looks at activity date on the gift-club record to all user to select recent additions

Gift Totals

Department Totals Name List

Select names and totals by designation department

Designation Most Recent Gift Date

Select donors by most-recent gift to a specified designation

Designation Totals Name List

Select names and totals by designation

Donor Counts by Category within Fiscal Year

Donor Counts by Fiscal Year with Category

Gift Totals by Pledge Calendar Year from Date Range

used to break down pledge-payments received by year of pledge

Gift Totals by Pledge Calendar Year, Type from Date Range

used to break down pledge-payments received by year of pledge

Gift Totals by Pledge Fiscal Year from Date Range

used to break down pledge-payments received by year of pledge

UABANNER.EXE – Client/Server Reports



Gift Totals by Pledge Fiscal Year, Type from Date Range

used to break down pledge-payments received by year of pledge



School (College) Totals Names List

Select names and totals by designation school



Subtotals by Entity Type within Date Range

totals by donor type as in Alumni vs Faculty vs Friends etc.



Subtotals for College by Entity Type within Date Range

totals by donor type as in Alumni vs Faculty vs Friends etc.



Subtotal Pledge Payments by Fiscal Year and Type for Pledges w/in range

Subtotals for pledge types

Gift/Pledge/Payment/Match Lists

Gift and Pledge List

Selects gifts and pledges by any or all of the following parameters designation, date range, amount, donor category, solicitor organization, campaign, gift or pledge type, preferred class year of the donor(s). The “Get from Report” button runs a report of all designations – you can sort and filter this report. You can double-click on a designation and the report will close and that designation will be inserted in the designation parameter list or you can filter the report using any of the data shown and then choose apply all and all of those designations will be shown. This allows you to easily select all designations associated with a specific school code for instance, then the apply all button will insert all these codes into the Designation Codes parameter list.

Output format allows you to select on of the following output formats:

Donor Count – Count of Distinct Donors for qualifying gifts (as opposed to a count of gifts)

Gift and Pledge List – All Gifts and Pledges that qualify are listed with donor name and address

Gift and Pledge List with Phone Numbers --- All Gifts and Pledges that qualify are listed with donor name, address and phone number

Gift and Pledge Totals Only – totals by designation

Gift Lists – Gifts Only

Memory and Honor Repeating List – (lists gifts and pledges to specified designations within specified dates if Honor or Memory records are also associated with the transactions. Transactions are duplicated if the transaction is in honor or memory of more than one person. No totals are included. This list is for creating a honor/memory info spreadsheet with a separate record for each person honored or memorialized.

Pledges Only

Gift/Pledge/Payment/Match Lists (Continued)



Gift and Pledge List (continued)

Exclude Planned Giving

If the exclude-planned-giving checkbox is checked, planned gifts are excluded from the reports. The checkbox is checked by default. You can uncheck it to include planned gifts or uncheck it and specify gift-or-pledge type = “Planned Gift” to only include planned gifts.

sql preview

Check this box if you are receiving unexpected results. It will display the generated sql statement as well as copy it to your clipboard. You can paste it into an email and request assistance.

Maximum Date of Record 11/18/2006

By default Maximum Date of Record is set to the current date – this will exclude pledges with a pledge date later than the current date

All other parameters are ignored if no value is specified.

Insert Row

Click the insert row to add additional values when the parameter list is full.



Matching Gift Company List from Record Date Range (exportable)

used to get lists of companies who made matching gifts



Matching Gift List by Matched Donor

Lists matching gifts selected by the donor whose gift was matched



Matching Gift List by MG Company from Record Date Range

used to review matching gifts received during specified time period



Matching Gift List by MG Company, Date and Coll Code

used to review matching gifts received during specified time period for a specified matching gift company, date and college code



Memory/Honor Gifts by Person Honored

List all gifts made in honor or memory of specified person



Memory/Honor Gifts and Pledges by Person Honored

List all gifts and pledges made in honor or memory of specified person



Pledge Aging Report by Coll Code

standard pledge aging report for a specified school



Pledge Aging Report with Primary Constituent Code


standard pledge aging report with extra columns




Preferred Class Donor and Nondonor List

Reunion giving report

UABANNER.EXE – Client/Server Reports

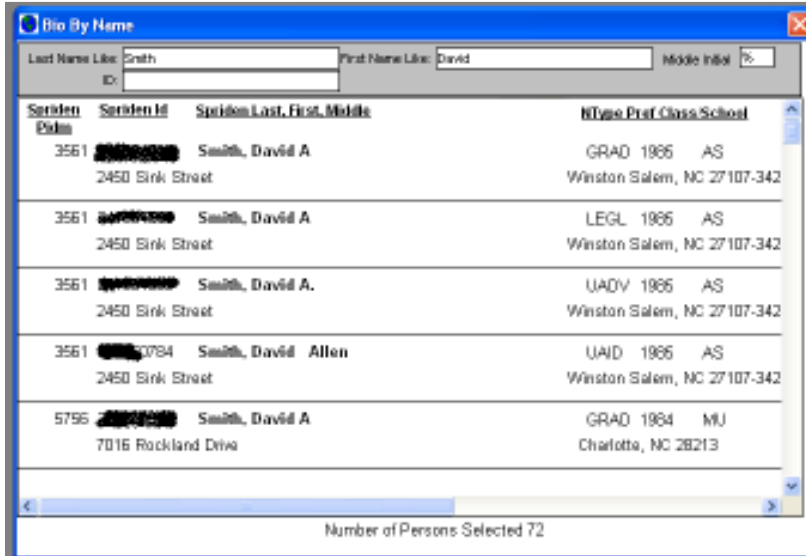
 PrefClass Totals Specified Cal Yr
Reunion giving report.

Prospect Tracking Reports

 Bio By Name with Dynamic Report List

summary of any constituent's biographical, activity, giving, and prospect tracking data

Step 1: type in name or id and hit enter to search:

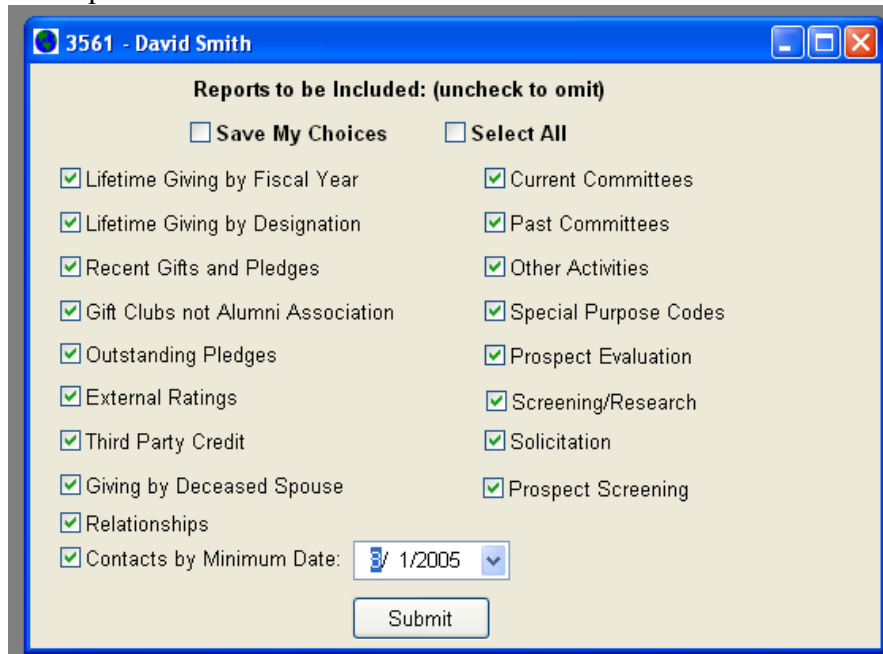


Searcher Date	Searcher ID	Searcher Last, First, Middle	NTYPE	Prof Class	School
3561	[REDACTED]	Smith, David A 2450 Sink Street	GRAD	1966	AS Winston Salem, NC 27107-342
3561	[REDACTED]	Smith, David A 2450 Sink Street	LEGL	1966	AS Winston Salem, NC 27107-342
3561	[REDACTED]	Smith, David A. 2450 Sink Street	UADV	1966	AS Winston Salem, NC 27107-342
3561	[REDACTED]0784	Smith, David Allen 2450 Sink Street	UAID	1966	AS Winston Salem, NC 27107-342
5795	[REDACTED]	Smith, David A 7016 Rockland Drive	GRAD	1964	MJ Charlotte, NC 28213

Number of Persons Selected 72

Step 2: Double-click on a name to select

Step 3: Select Reports to be included



3561 - David Smith

Reports to be Included: (uncheck to omit)

Save My Choices Select All

<input checked="" type="checkbox"/> Lifetime Giving by Fiscal Year	<input checked="" type="checkbox"/> Current Committees
<input checked="" type="checkbox"/> Lifetime Giving by Designation	<input checked="" type="checkbox"/> Past Committees
<input checked="" type="checkbox"/> Recent Gifts and Pledges	<input checked="" type="checkbox"/> Other Activities
<input checked="" type="checkbox"/> Gift Clubs not Alumni Association	<input checked="" type="checkbox"/> Special Purpose Codes
<input checked="" type="checkbox"/> Outstanding Pledges	<input checked="" type="checkbox"/> Prospect Evaluation
<input checked="" type="checkbox"/> External Ratings	<input checked="" type="checkbox"/> Screening/Research
<input checked="" type="checkbox"/> Third Party Credit	<input checked="" type="checkbox"/> Solicitation
<input checked="" type="checkbox"/> Giving by Deceased Spouse	<input checked="" type="checkbox"/> Prospect Screening
<input checked="" type="checkbox"/> Relationships	
<input checked="" type="checkbox"/> Contacts by Minimum Date: 1/2005	

Submit

Prospect Tracking Reports (continued)



Move Summary

report of contacts added to prospect tracking system for a specific staff member and time period



Moves Summary Proof Report

report of contacts added to prospect tracking system for a specific staff member and time period



Organization Spreadsheet

list of organizational records with contact information and addresses; can filter for those with email addresses only



Pipeline Report

list of assigned prospects for any prospect manager with accompanying biographical, giving, and prospect evaluation data



Prospect Call Report

Contact report by contact-start-date, staff initials, and id



Prospect Call Report (Rich Text Version)

Contact report by contact-start-date, staff initials, and id (rich text allows cutting and pasting of the data)



Screening Report

quick list of prospects based on preferred school, class year, rating type, rating, county, or state



Solicitation Status Report

list of prospects and accompanying solicitation data for those prospects with pipeline status of Ask Made, Pre-Solicitation, Solicitation Planned, or Verbal Commitment



Tickler Report

follow-up moves added to prospect tracking system for a specific staff member, listed in follow-up date order

Spartan Club Reports

Counts and Totals



Spartan Annual Giving by Level

Athletic designation totals and donor counts by level



Spartan Slides

Various counts and totals



Spartan Slides 2 (Numbers for UNCG Spartan Club Current Funds)

Various counts and totals for athletics current funds (ATHCR)



Spartan Slides 3 (Numbers for UNCG Spartan Club Endowments)

Various counts and totals for athletics endowed funds (ATHEN)



Spartan Giving Report for Curr Fiscal Year

Overall athletic fund totals for current fiscal year



Spartan Giving Report for any Fiscal Year

Overall athletic fund totals for any fiscal year

Member Lists




Anniversary Spartan Club Member Count by County

Member counts by county



Anniversary Spartan Club Members with Qualifying Amount

Members and qualifying amount based on gifts and pledges made within 365 days of date report is run. This report can be filtered and is set up with a filter “qualifying_amount > 0” as a sample. Just click on the filter icon: =



Calendar Spartan Club Members by Qualifying Amount

Members and qualifying amount based on gifts and pledges made within current and past calendar year



Calendar Year Spartan Donors by Gift Total

Based on selected calendar year only



Calendar Year Spartan Donors by Gift Total (rank name order)

Based on selected Calendar Year only and sorted by total descending



Fiscal Year Spartan Club Members by Qualifying Amount

Members and qualifying amount based on gifts and pledges made within specified fiscal year to athletics designations



Fiscal Year Spartan Club Member by Current Fund Amount

UABANNER.EXE – Client/Server Reports

Members and qualifying amount based on gifts and pledges made within specified fiscal year to athletics designations that are current.



Fiscal Year Spartan Club Member by Endowed Fund Amount

Members and qualifying amount based on gifts and pledges made within specified fiscal year to athletics designations that are endowed.

Donor Lists



First Time Spartan Donors by Fiscal Year

Donor who gave to athletics type designations within specified fiscal year, but not one prior to that year. This report contains a list of the most recent gifts for proofing. See Sample:

1st Year Spartan Donors	
<i>First Time Donors in Fiscal: 2010</i>	
885036866 Ms. Nicole Marie Armstrong	
Do Not Mail	\$100.00
Cochranville PA 19330	Life Total: \$100
	Nbr Years:1
886026450 Mrs. Kitty Rogers Baird	
353 Swope Dr	\$25.00
Danville KY 40422-1252	kittybaird@bellsouth.net
	Life Total: \$25
	Nbr Years:1
Count: 116	Spouse Count: 39
Page 1 of 116	
Design - d_spartan_club_fiscal_first_year \Preview - d_spartan_club_fiscal_first_year	



First Time Spartan Donors by Fiscal Year (Current)

Donor who gave to current, athletics type designations within specified fiscal year, but not one prior to that year.



First Time Spartan Donors by Fiscal Year (Endowment)

Donor who gave to endowed, athletics type designations within specified fiscal year, but not one prior to that year.

UABANNER.EXE – Client/Server Reports



Increased or Decreased Donors by Fiscal Years

List donors who gave to athletics designations in both of the specified fiscal years and the giving total for each fiscal year is different. Donations for one of the fiscal years must be above the specified minimum. Prompts are for the 2 fiscal years and a minimum amount. Select a category to filter the list by category. Click to limit to student athletes or return the list to the original selection (everybody). There are 2 additional versions of this report, 1 for current funds and 1 for endowed funds. Results can be printed or saved to excel.

Changed Level Spartan Donors

Spartan Current Donors

\$750 Minimum with Fiscal 2009 Total Not Equal Fiscal 2010 Total

890001710 Mr. Nelson E. Bobb
 25 Holly Springs Lane 2009: \$3,250 2010: \$2,500
 Greensboro NC 27455
 Life Total: \$26,955
 Nbr Years:19
FCST

887850671 Dr. Linda Parrish Brady
 Mr. Gustav A. Heyer 2009: \$3,000 2010: \$2,500
 Office of the Chancellor lpbrady@uncg.edu
 303 Mossman Building
 CAMPUS FCST
 Greensboro NC 27402-6170
 Life Total: \$5,500
 Nbr Years:2

895068844 Mr. David Michael Dement

Count: 7
Spouse Count 5
Page 1 of 4
Life Total is for all Spartan Giving

Faculty/Staff	▼
ALGR Graduate School Alumna/us	▲
ALND Non-degreed Alumna/us	☰
ALUG Undergraduate Alumna/us	☰
CORP Corporation	☰
FCST Faculty/Staff	☰
FFND Family Foundation	▼

Student Athletes

Everybody



Increased or Decreased Donors by Fiscal Years (Current)

List donors who gave to current type, athletics designations in both of the specified fiscal years and the giving total is higher in the specified higher-giving year than in the specified lower giving year.



Increased or Decreased Donors by Fiscal Years (Endowment)

List donors who gave to endowment type, athletics designations in both of the specified fiscal years and the giving total is higher in the specified higher-giving year than in the specified lower giving year.

UABANNER.EXE – Client/Server Reports

Lapsed Spartan Donors by Fiscal Year Range (w/recent Gifts)

This report selects athletics designation donors based on a minimum amount and fiscal year range. The fiscal year range is compared to the most recent fiscal year in which the donor made a gift. So donors who donated after the max fiscal year will not be included. The most likely parameters will be current fiscal year -5 and current fiscal year -1. If you use current fiscal year as the max, you will be including current year donors. Recent gifts are printed for each donor as further evidence that you have selected what you intended.

Lapsed Spartan Donors by Fiscal Year Range

This report selects athletics designation donors based on a minimum amount and fiscal year range. The fiscal year range is compared to the most recent fiscal year in which the donor made a gift. So donors who donated after the max fiscal year will not be included. The most likely parameters will be current fiscal year -5 and current fiscal year -1. If you use current fiscal year as the max, you will be including current year donors. Recent gift lists are not included.

Lapsed Spartan Donors by Fiscal Year Range using Filter

This report selects athletics designation donors based on a minimum amount and fiscal year range. The fiscal year range is compared to the most recent fiscal year in which the donor made a gift. So donors who donated after the max fiscal year will not be included. The most likely parameters will be current fiscal year -5 and current fiscal year -1. If you use current fiscal year as the max, you will be including current year donors. Recent gift lists are not included. This report retrieves the same data as the one above, but may run faster by using a different retrieval method. When this is tested, both versions will probably not be necessary.

Matching Claim List

This report lists outstanding matching claims on Spartan type designation gifts made on or after the supplied minimum date. Matching Claims are generated when someone who is already linked to a matching-gift organization makes a gift. When the gift is match the claim is replaced by a matching gift.

Non-Renewals

List all athletic type designation donors from prior fiscal year who have not yet given this fiscal year. List includes names prior year amounts and current year amounts.

Renewed, Current Fund Donors by Fiscal Year

List athletic type designation donors who gave both this fiscal year and last.

Spartan Payroll Deduct and Bank Draft Pledges

Pledge report on pledges with type “BD” or “PY” (Bankdraft or Payroll) and designation department code SCL (Spartan Club).

Spartan Renewal Bio (Athletics Current Funds Only)

pulls a list based on date of last gift to a Current Athletics Designation. Output can be saved as a merge file.

Spartan Renewal Bio (Athletics Current Funds Only with Outstanding Pledge)

pulls a list based on date of last gift to a Current Athletics Designation and existence of an outstanding pledge to the same designation type. Output can be saved as a merge file.

Spartan Renewal Bio (Athletics Current Funds Only without Outstanding Pledge)

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pulls a list based on date of last gift to a Current Athletics Designation and the absence of an outstanding pledge to the same designation type. Output can be saved as a merge file.

Athletes and Parents



Sports Merge File (Athletes Only) from Popsel

creates a grid list containing all awvhhld fields plus sport-code, sport description, year played. Will have duplicate rows for athletes that played more than 1 sport. Will drop records that played no sport.



Sports Report (Athletes List from Database)

creates a grid list containing name, address, and exclusion-code fields BUT DOES NOT INCLUDE sport-code, sport description, year played. Will NOT have duplicate rows for athletes that played more than 1 sport. Selects all persons with an SA% activity code with type "SPRTS"



Sports Report (Athletes List from Database by Sport)

creates a grid list containing name, address, and exclusion-code fields plus sport-code, sport description, year played. Will have duplicate rows for athletes that played more than 1 sport. Selects all persons with an SA% activity code with type "SPRTS"



Student Athlete Parents (from Popsel)

List students with permanent address, phone and parent record, if one exists. This is pulled from a popsel because that's the only way the UA user has access to the student data.



Student Athlete Parents (from Database)

Student Athlete Parents from the database

Sports Marketing Reports



Bio By Name with Dynamic Report List

summary of any constituent's biographical, activity, giving, and prospect tracking data

Step 1: type in name or id and hit enter to search:

Search ID	Search ID	Search Last, First, Middle	NTYPE	Prof	Class	School
3561	[REDACTED]	Smith, David A	GRAD	1966	AS	Winston Salem, NC 27107-342
3561	[REDACTED]	Smith, David A	LEGL	1966	AS	Winston Salem, NC 27107-342
3561	[REDACTED]	Smith, David A.	UADV	1966	AS	Winston Salem, NC 27107-342
3561	[REDACTED]	Smith, David Allen	UAID	1966	AS	Winston Salem, NC 27107-342
5796	[REDACTED]	Smith, David A	GRAD	1964	MU	Charlotte, NC 28213

Number of Persons Selected 72

Step 2: Double-click on a name to select

Step 3: Select Reports to be included

3561 - David Smith

Reports to be Included: (uncheck to omit)

Save My Choices Select All

- Lifetime Giving by Fiscal Year
- Lifetime Giving by Designation
- Recent Gifts and Pledges
- Gift Clubs not Alumni Association
- Outstanding Pledges
- External Ratings
- Third Party Credit
- Giving by Deceased Spouse
- Relationships
- Contacts by Minimum Date: 3/ 1/2005
- Current Committees
- Past Committees
- Other Activities
- Special Purpose Codes
- Prospect Evaluation
- Screening/Research
- Solicitation
- Prospect Screening

Submit

UABANNER.EXE – Client/Server Reports



Moves Summary Proof Report

report of contacts added to prospect tracking system for a specific staff member and time period



Moves Summary with Call Reports

report of contacts added to prospect tracking system for a specific staff member and time period (with additional detail)



Organization Spreadsheet

list of organizational records with contact information and addresses; can filter for those with email addresses only



Pipeline Report

list of assigned prospects for any prospect manager with accompanying biographical, giving, and prospect evaluation data



Tickler Report

follow-up moves added to prospect tracking system for a specific staff member, listed in follow-up date order

Tables (Code Translations)

All Banner Codes tables can be retrieved via “Banner Codes Tables”, reports that list more than code and description are listed individually:



Activity Codes (STVACTC)

Activity Code, Description, Type, Group



Banner Codes Tables

displays name and description of all codes tables available to the user and allows the user to create a report only any of these tables by clicking on the table name in the list displayed



Campaign Designation List by School and Imperative

Lists Designations by Students-First-Campaign Imperatives and college



Database Table Descriptions

Selects table and field descriptions for any table in banner.



Designation Codes

complete list of fields associated with each designation



Designation Codes without FOAP

Designations without FOAP codes.



Designation Comments Report

Designation list with all associated comments.



Gift Society Levels

Lists all Gift Society Codes as well as the giving level associated with the club.



Special Purpose Counts

Gives special purpose record counts grouped by special purpose type and code.

Printer Setup

Allows you to specify which printer you want to print the reports.

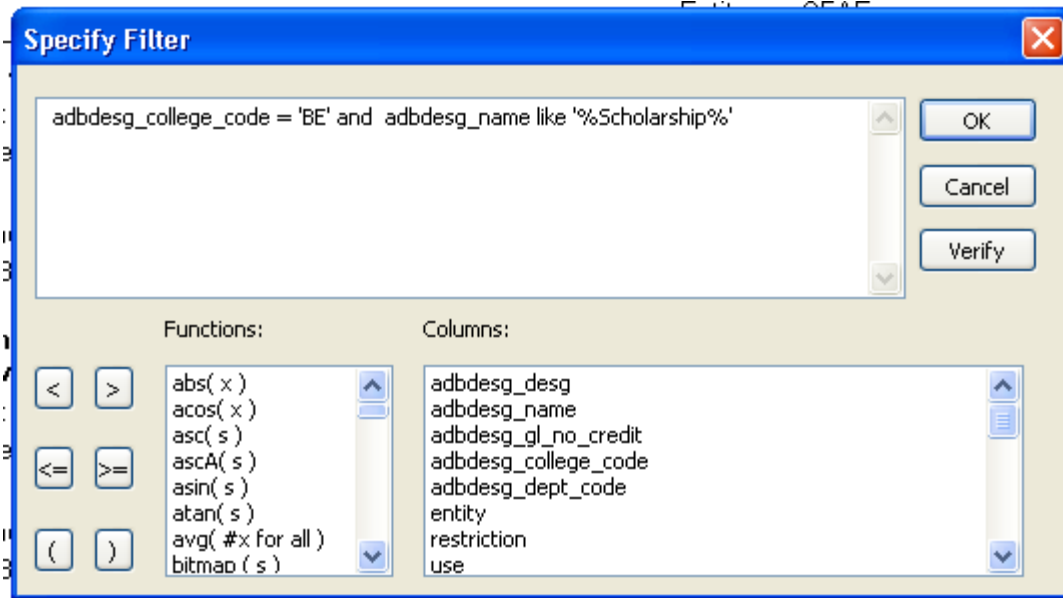
Filtering Reports

Example 1: Filtering designation list for Gift Reports

When you run Gift-and-Pledge Lists, under Development Reports/Gift and Pledge Reports, you have the option to get the list from a report. You click on the button to run the report:

Get From Report

This runs a designation report that you can filter. To filter, click on the filter icon. This will bring up the specify-filter box:



You pick column names from the list and then specify a Boolean statement using that column's value, such as column equals a value or column like a value.

“=” looks for an exact match

“Like” looks for a value containing the string. %'s are interpreted as “any character” by oracle when using a like statement. Designation_name like ‘%Scholarship%’ will pull any designation where the word ‘Scholarship’ is at the beginning, at the end or anywhere within the designation name.

In the example above, you would get all designations where the college_code is equal to 'BE' and 'Scholarship' is anywhere within the name:

9/5/2006	
Designation List	
Abdbdesg	Abdbdesg Name
Desg	
ALLENC UN	Charles Burchette Allen Scholarship Endowment
Type:	ENSCH - Endowment Scholarship/Fellowsh Active
School/Dept:	BE - School of Business & Economics/ BAD - Business Adm
Restriction:	1 - Need
Use:	Stewardship Use Scholarship
FOAP:	G G31003 56001 385101 170
ALLENRJ UN	Roscoe J. and Anna Mae Burchette Allen ScholarshipEndowment
Type:	ENSCH - Endowment Scholarship/Fellowsh Active
School/Dept:	BE - School of Business & Economics/ BAE - Bryan School
Restriction:	1 - Need
Use:	Stewardship Use Scholarship
FOAP:	G G31136 56001 385101 170
BANKAMR EX	Bank of America Scholarship Endowment
Type:	FNSCH - Endowment Scholarship/Fellowsh Active