Banner Self-Service
Alumni and Friends Training Workbook

Release 8.0 - April 2008
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SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website
http://connect.sungardhe.com

Distribution Services e-mail address
distserv@sungardhe.com

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Revision History Log

Publication Date	Summary
April 30, 2008	New version that supports Banner 8 Advancement Self-Service software.

Think before you print.

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Introduction

Course goal

The goal of this course is to provide you with the knowledge and practice to set up and fully access the Alumni and Friends Self-Service function at your institution.

Course objectives

In this course you will learn how to

- identify and describe Banner forms and processes used for set-up
- create rules and set parameters used to process data
- communicate with an institution via Banner Alumni and Friends Self-Service
- submit a class note
- maintain a current mailing list
- respond to one or more surveys
- volunteer to help the institution
- create and update an interest profile
- create or search for job postings
- sign up to be a career mentor
- search for career mentors
- pledge support to the institution
- make a credit card donation
- create a new record in the Banner database.

Intended audience

Advancement Office Staff

Prerequisites

To complete this course, you should have completed the Education Practices computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system

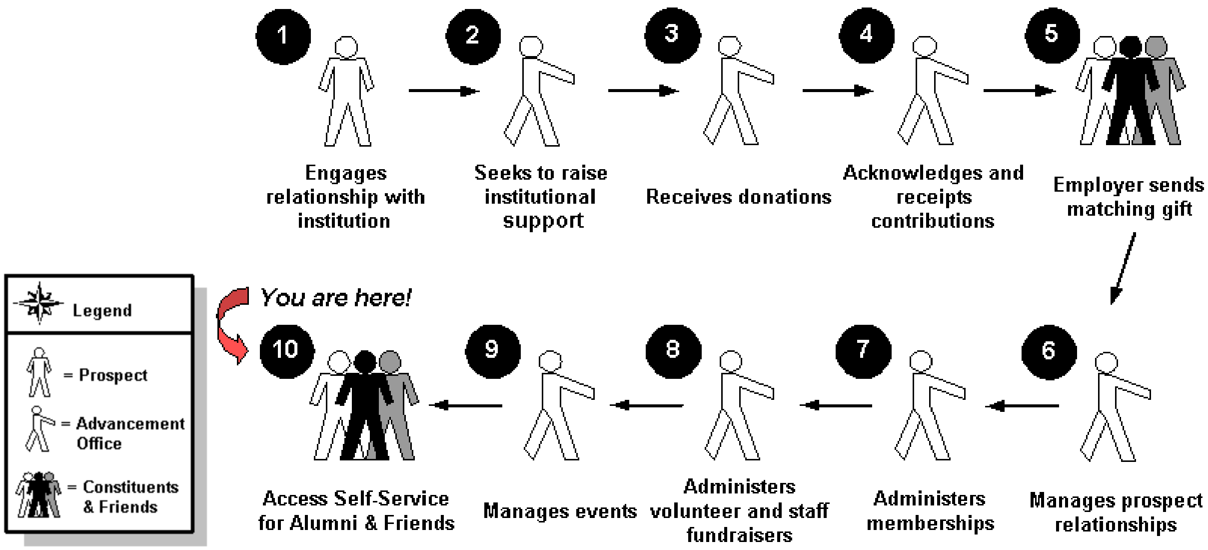
Process Introduction

Introduction

Alumni and Friends Self-Service is a Web tool that connects the constituent to the Banner Advancement database and allows your institution to communicate with your constituents using the convenience, speed, and technology of the World Wide Web. This tool enables your constituents to provide updated information for your organization allows them to find a mentor for career development, gives them the opportunity to advertise a job opening in their company, and to make pledges and gifts via the Web.

Flow diagram

This flow chart highlights Alumni and Friends Self-Service within the overall Advancement process.



Set Up

Section goal

The goal of this section is to outline the process and detail the procedures to set-up your Banner system to create access and the ability to view information via the web.

Objectives

In this section you will learn how to

- identify and describe Banner forms and processes used for set-up
- create rules and set parameters used to process data.

Set Up the Web Products in Banner

Introduction

Some of the initial set up for the Alumni and Friends Self-Service product is generic in nature; in other words, the same general steps are required regardless of which product is accessed. Alumni and Friends Self-Service is one of several Banner products designed to allow individuals access to Banner features over the World Wide Web. Alumni and Friends Self-Service provides information access to Banner Advancement, which includes secure user-specific information stored in Banner tables.

Who should have access?

The institution and/or the Advancement area will determine access and PIN set up in WebTailor. This is an external site for the use of alumni and friends

Address Role Privileges Form (GOAADRL)

The Address Role Privileges Form is a Banner General System form that

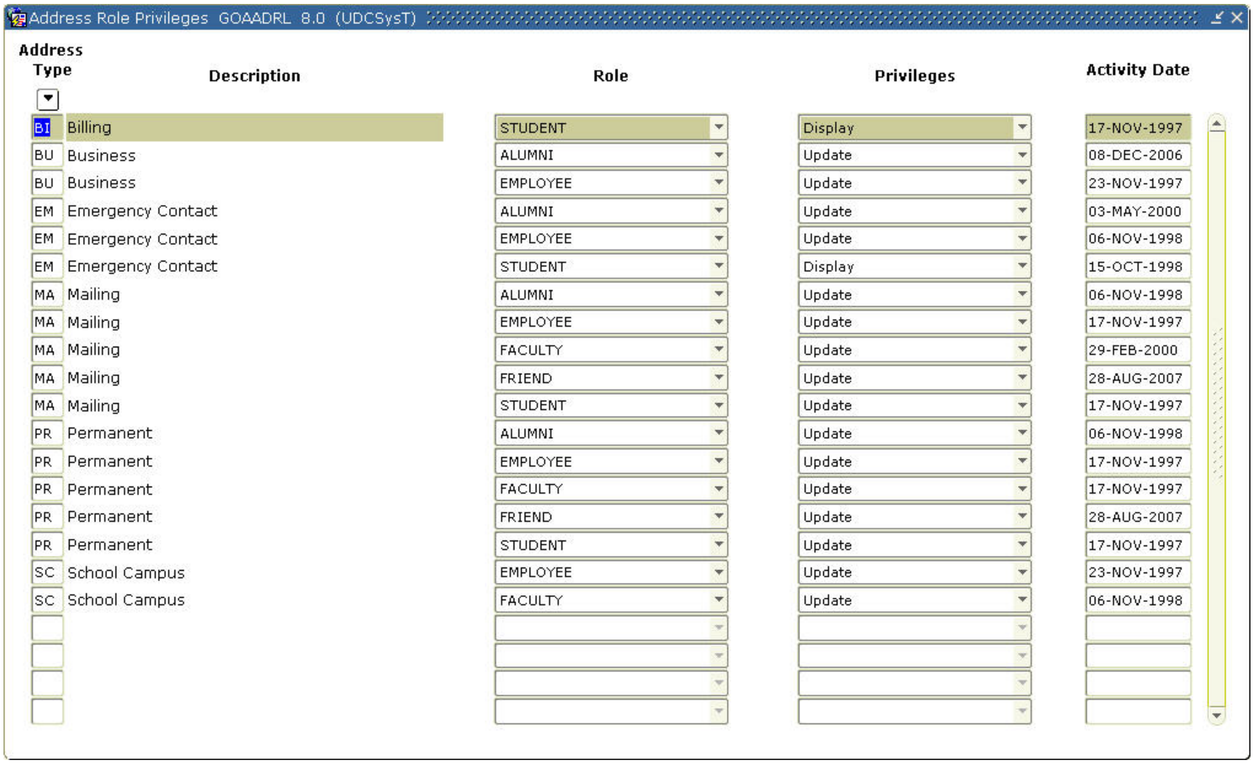
- identifies address types used by each role
- defines the privileges for Web address information processing.

An address role privilege rule must be defined for each distinct address type and constituent role that should be available for Web address processing.

The Web products allow individuals to view and update addresses; however, the institution can determine exactly what addresses may be viewed and/or updated and can also determine who (based on role) should be able to view and/or update addresses. An institution-wide committee should be established to discuss and set these rules. A consensus must be reached about granting update or display privileges when address types are shared and one person has multiple roles in Banner. The privilege for the highest role will prevail.

Example: When the MA, home mailing, address is shared by all systems and an individual has the student, employee, and alumni role, the privilege for the employee role will apply to the record.

View



Address Role Privileges GOAADRL 8.0 (UDCSysT)

Address Type	Description	Role	Privileges	Activity Date
BI	Billing	STUDENT	Display	17-NOV-1997
BU	Business	ALUMNI	Update	08-DEC-2006
BU	Business	EMPLOYEE	Update	23-NOV-1997
EM	Emergency Contact	ALUMNI	Update	03-MAY-2000
EM	Emergency Contact	EMPLOYEE	Update	06-NOV-1998
EM	Emergency Contact	STUDENT	Display	15-OCT-1998
MA	Mailing	ALUMNI	Update	06-NOV-1998
MA	Mailing	EMPLOYEE	Update	17-NOV-1997
MA	Mailing	FACULTY	Update	29-FEB-2000
MA	Mailing	FRIEND	Update	28-AUG-2007
MA	Mailing	STUDENT	Update	17-NOV-1997
PR	Permanent	ALUMNI	Update	06-NOV-1998
PR	Permanent	EMPLOYEE	Update	17-NOV-1997
PR	Permanent	FACULTY	Update	17-NOV-1997
PR	Permanent	FRIEND	Update	28-AUG-2007
PR	Permanent	STUDENT	Update	17-NOV-1997
SC	School Campus	EMPLOYEE	Update	23-NOV-1997
SC	School Campus	FACULTY	Update	06-NOV-1998

Steps

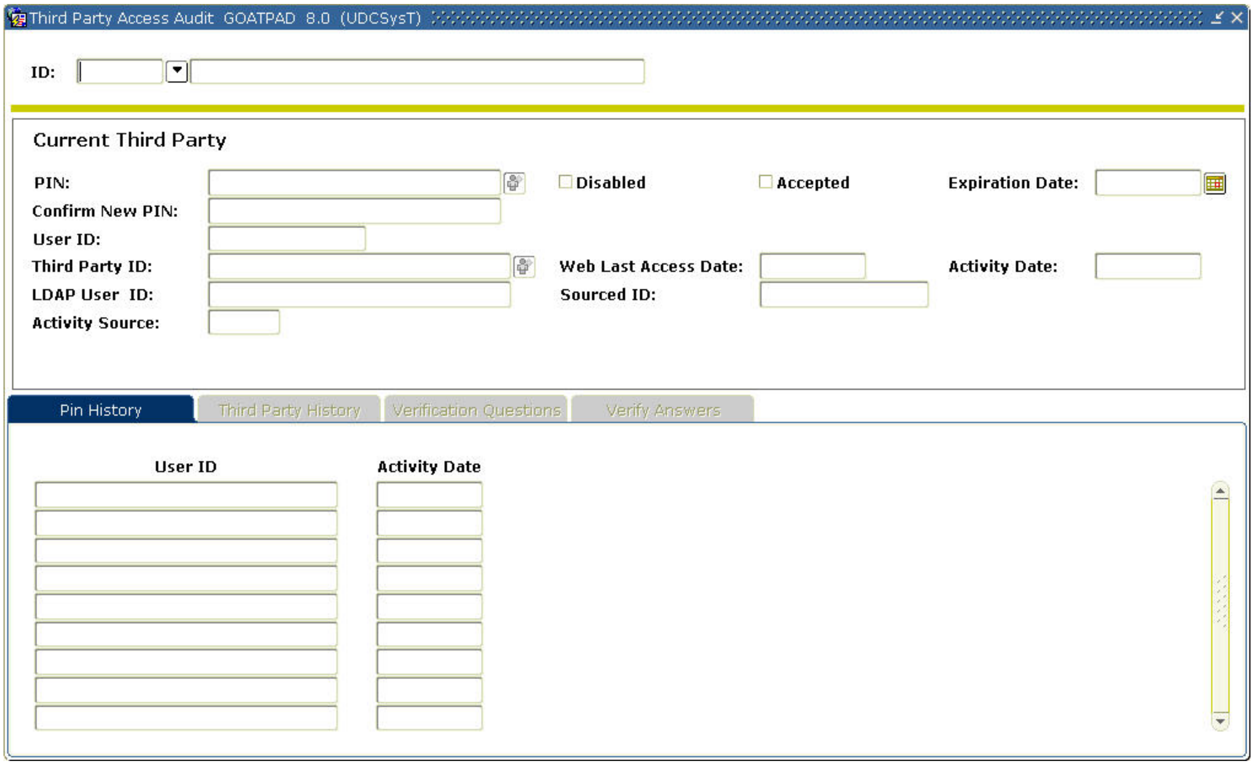
1. Access the Address Role Privileges Form (GOAADRL).
2. Perform an **Insert Record** function.
3. Double-click in the **Address Type** field and select the code identifying Mailing from the Address Type Validation Form (STVATYP).
4. In the **Role** field, select Alumni from the drop-down menu.
5. In the **Privileges** field, enter *U* to allow update privileges.
6. Click the **Save** icon.

   Note: This indicates that anyone with an Alumni Role is able to view and update their mailing addresses via Alumni and Friends Self-Service.
7. Click the **Exit** icon.

Third Party Access Audit Form (GOATPAD)

The Third Party Access Audit Form (GOATPAD) assigns and maintains PIN numbers. Only the security administrator of an institution should have access to this form. This form also assigns a new PIN, changes PIN information, and reviews PIN history.

View



Steps

1. Access the Third Party Access Audit Form (GOATPAD).
2. Enter the ID of the individual that needs to have a PIN number established in the ID field, or perform a search to locate the appropriate record.
3. Perform a **Next Block** function.
4. Select the **Generate ID** function at the end of the **PIN** field to assign a new pin.
5. Click the **Disabled** checkbox if the pin is disabled.

6. Click the **Accepted** checkbox if you do not want the Terms of Usage page to display upon login to Web For products. Leave it blank if you want the Terms of Usage to display.

7. In the **Expiration Date** field, enter a date one-month from today.

   Note: The date can be assigned in one of four ways:

   - The security administrator manually assigns the date on this form.
   - A staff member manually assigns the date on GOATPAC.
   - The date is automatically assigned if the end user changes his or her PIN and a rule for PIN expiration days is specified on the Customize Web Rules page of WebTailor.
   - The date is automatically set to one day before the current date if the PIN is reset on this form or on GOATPAC. This requires the constituent to immediately change his PIN upon logging on after a PIN has been reset.

8. The **Third Party ID** field relates to an internal e-mail routing number used by Campus Pipeline. Leave null.

9. The **PIN Hint Question** and **PIN Hint Response** fields are filled out by the end user upon first log on to the secure area of the Self-Service products.

10. The Third Party History Information block provides a history of previous PIN numbers and is for display only.

11. Click the **Save** icon.

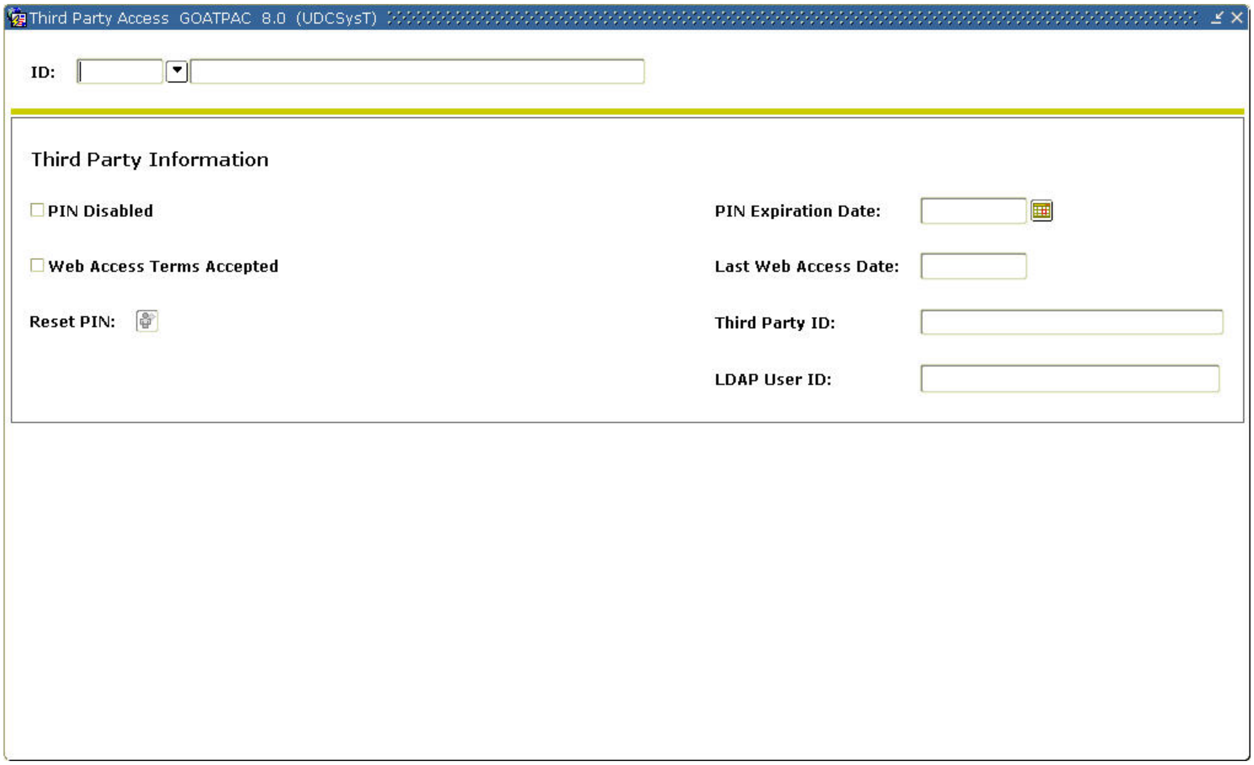
12. Click the **Exit** icon.

Third Party Access Form (GOATPAC)

The Third Party Access Form (GOATPAC) is used to reset or update PIN information, disable a PIN, set a PIN expiration date, or force the display of terms of usage for third party access products such as the Web.

This form can be used to reset an individual's PIN without allowing the staff to view the current PIN or the PIN chosen by the individual.

View



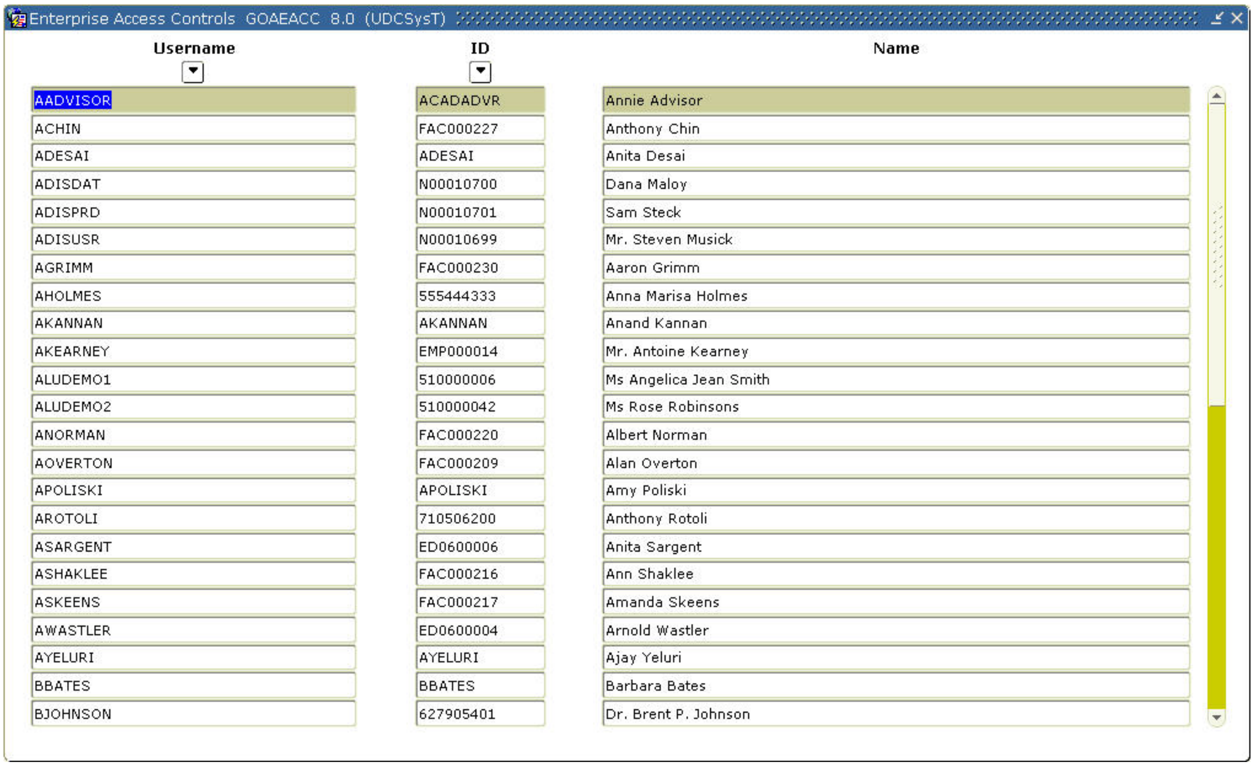
Steps

1. Access the Third Party Access Form (GOATPAC).
2. Enter the ID of the individual that has requested his/her PIN number to be reset in the **ID** field.
3. Perform a **Next Block** function.
4. Do NOT click the **Reset Pin** icon. This icon resets the individuals PIN to a number determined by the institution (generally the birth date).
5. Navigate to the **PIN Expiration Date** field. The date in this field indicates when the end user must change his or her PIN. The date you entered on GOATPAD displays.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Enterprise Access Control Form (GOAEACC)

The Enterprise Access Control Form (GOAEACC) is used to associate the Oracle username with the Banner ID of users who can perform various processing functions in Banner and associated products such as Self-Service. Security access to this form should be limited.

View


Enterprise Access Controls GOAEACC 8.0 (UDCSysT)

Username	ID	Name
AADVISOR	ACADADVR	Annie Advisor
ACHIN	FAC000227	Anthony Chin
ADESAI	ADESAI	Anita Desai
ADISDAT	N00010700	Dana Maloy
ADISPRD	N00010701	Sam Steck
ADISUSR	N00010699	Mr. Steven Musick
AGRIMM	FAC000230	Aaron Grimm
AHOLMES	555444333	Anna Marisa Holmes
AKANNAN	AKANNAN	Anand Kannan
AKEARNEY	EMP000014	Mr. Antoine Kearney
ALUDEMO1	510000006	Ms Angelica Jean Smith
ALUDEMO2	510000042	Ms Rose Robinsons
ANORMAN	FAC000220	Albert Norman
AOVERTON	FAC000209	Alan Overton
APOLISKI	APOLISKI	Amy Poliski
AROTOLI	710506200	Anthony Rotoli
ASARGENT	ED0600006	Anita Sargent
ASHAKLEE	FAC000216	Ann Shaklee
ASKEENS	FAC000217	Amanda Skeens
AWASTLER	ED0600004	Arnold Wastler
AYELURI	AYELURI	Ajay Yeluri
BBATES	BBATES	Barbara Bates
BJOHNSON	627905401	Dr. Brent P. Johnson

Steps

1. Access the Enterprise Access Control Form (GOAEACC).

2. Enter the Oracle BANNER user name used to access BANNER in the Username field

3. Enter the same person's Banner ID used to access this person's information once in Banner in the ID field.   Unless an alternate ID has been established, this is usually the same Banner ID used to access Advancement Self-Service.

4. The person's current name associated with the Banner ID will default into the **Name** field

5. Click the **Save** icon.

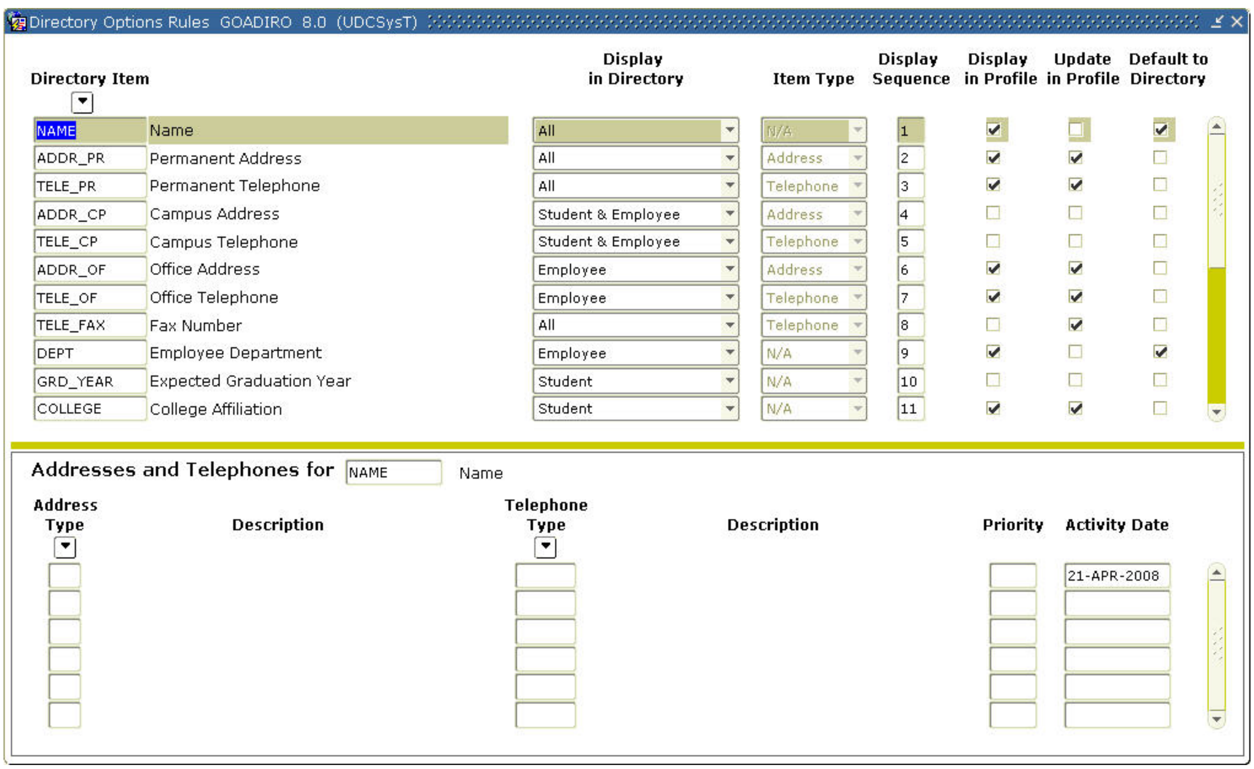
6. Click the **Exit** icon.

Directory Option Rule Form (GOADIRO)

The Directory Option Rule Form (GOADIRO) displays the options for items to include in individual profiles and institution directories via the Web. The items listed here are system-required directory codes delivered by SunGard Higher Education and must not be changed. The codes for each item may be updated as well as whether the item should be included in directories and profiles. Because this form establishes the base role for all Web products, only the instructor should update the rules.

This allows the institution to control what information is initially displayed on the Web for an individual. The form also controls what directory items the individual can choose to add or remove from his/her profile.

View



Directory Options Rules GOADIRO 8.0 (UDCSysT)

Directory Item		Display in Directory	Item Type	Display Sequence	Display in Profile	Update in Profile	Default to Directory
NAME	Name	All	N/A	1	☑	☐	☑
ADDR_PR	Permanent Address	All	Address	2	☑	☑	☐
TELE_PR	Permanent Telephone	All	Telephone	3	☑	☑	☐
ADDR_CP	Campus Address	Student & Employee	Address	4	☐	☐	☐
TELE_CP	Campus Telephone	Student & Employee	Telephone	5	☐	☐	☐
ADDR_OF	Office Address	Employee	Address	6	☑	☑	☐
TELE_OF	Office Telephone	Employee	Telephone	7	☑	☑	☐
TELE_FAX	Fax Number	All	Telephone	8	☐	☑	☐
DEPT	Employee Department	Employee	N/A	9	☑	☐	☑
GRD_YEAR	Expected Graduation Year	Student	N/A	10	☐	☐	☐
COLLEGE	College Affiliation	Student	N/A	11	☑	☑	☐

Addresses and Telephones for NAME Name

Address Type	Description	Telephone Type	Description	Priority	Activity Date
					21-APR-2008

Steps

1. Access the Directory Options Rule Form (GOADIRO).

2. Double click in the **Directory Item Code** field and select College.

3. Select Alumni from the **Display in Directory** field drop-down menu.

4. Enter the next sequential number in the **Display Sequence** field.

5. Click in the **Display in Profile** checkbox.

6. Click in the **Update in Profile** checkbox.

7. Click in the **Default to Directory** checkbox.

   Note: This column specifies whether this directory item appears on the campus-wide directory for all individuals. For Alumni, this indicates that this item appears when a 'find a classmate' search is conducted.

8. Click the **Save** icon.

9. Click the **Exit** icon.

   Notes:

   - Address and telephone items on the Directory Option Rule form require additional information. For instance, Home Address requires the institution to enter the specific address type used to identify the home address. Navigating to the next block allows you to enter the appropriate address or telephone type.

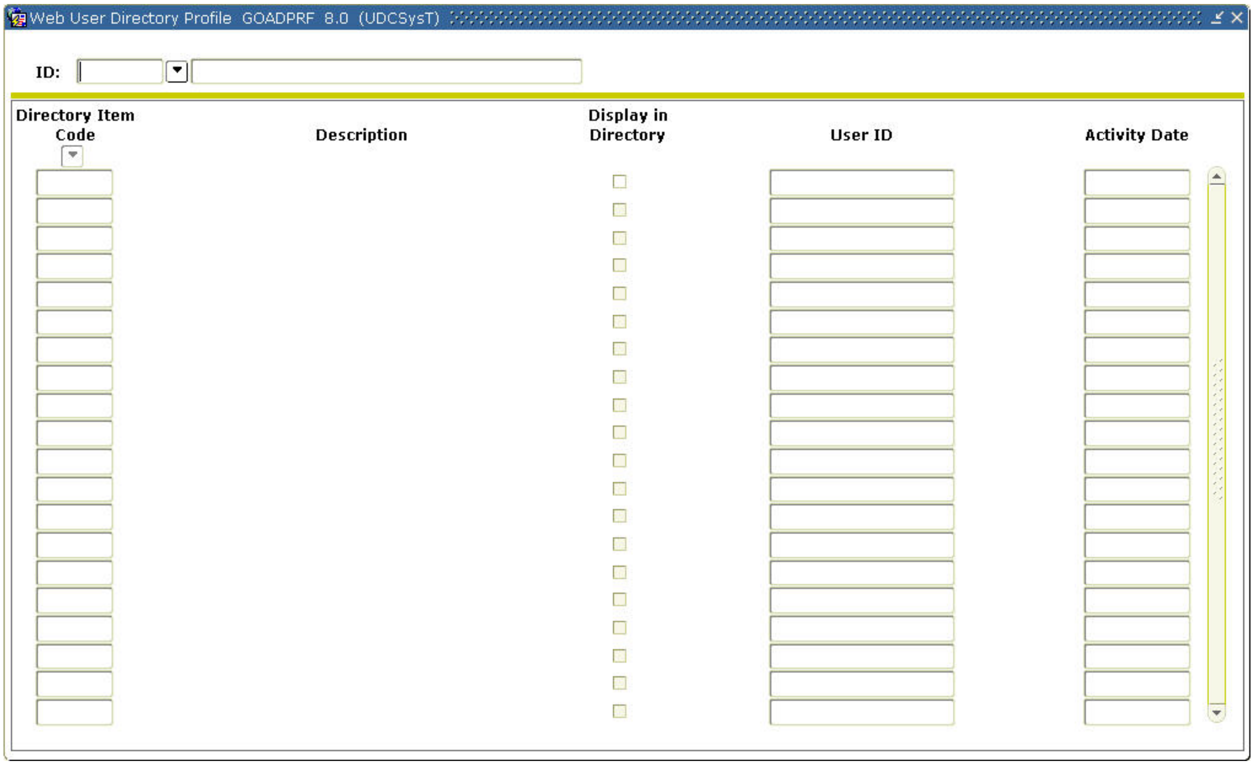
   - The institution may also update the Individual Directory Profile on the Web User Directory Profile Form (GOADPRF).

Web User Directory Profile Form (GOADPRF)

This form stores constituent modifications to their personal directory profile. It also allows the institution to modify the information that displays for a particular constituent.

Where the Directory Option Rule Form establishes the ‘base’ profile for all individuals, the Web User Directory Profile maintains the profile for a single individual.

View



Steps

1. Access the Web User Directory Profile Form (GOADPRF).
2. Enter the Banner ID of the Web user in the **ID** field.
3. Enter the code that identifies the type of information included in the directory profile in the **Directory Item Code** field.
4. The **Description** field will default.
5. Check the **Display in Directory** check box to indicate whether the item appears in the Web directory.
6. The **User ID** field indicates the ID of the person who entered or changed the profile.
7. The **Activity Date** indicates when the profile was created or last changed. Display-only.

Setup Alumni and Friends Self-Service in Banner

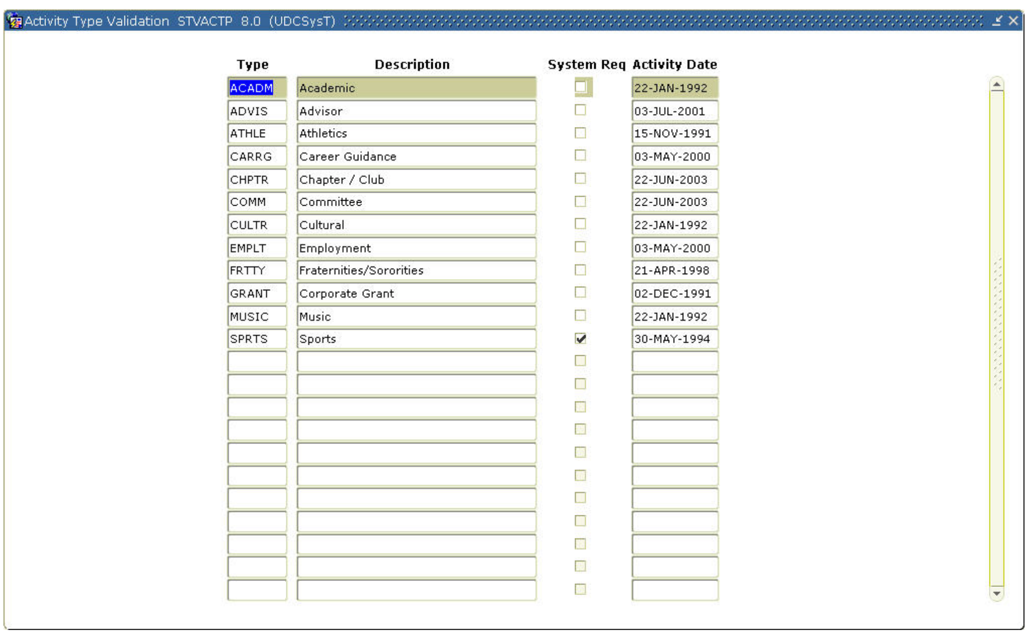
Because Alumni and Friends Self-Service displays information from Banner, there are several forms in Banner that impact the information that displays on the Internet. In addition to the Alumni and Friends Self-Service Rules contained in WebTailor and the General Web forms in Banner, there are specific Advancement Module forms that should be discussed. These forms were covered in detail during previous training sessions and your instructor may have explained how the form is used to set up Self-Service for Alumni and Friends.

Supporting forms

The following Banner forms affect the Advancement Web Rules page.

Activity Type Validation Form (STVACTP)

The Activity Type Validation Form lets you define activity type codes and descriptions. The Alumni and Friends Self-Service product uses an activity type to identify individuals who sign up to be career advisors.


Activity Type Validation STVACTP 8.0 (UDCSysT)

Type	Description	System Req	Activity Date
ACADM	Academic		22-JAN-1992
ADVIS	Advisor		03-JUL-2001
ATHLE	Athletics		15-NOV-1991
CARRG	Career Guidance		03-MAY-2000
CHPTR	Chapter / Club		22-JUN-2003
COMM	Committee		22-JUN-2003
CULTR	Cultural		22-JAN-1992
EMPLT	Employment		03-MAY-2000
FRTTY	Fraternities/Sororities		21-APR-1998
GRANT	Corporate Grant		02-DEC-1991
MUSIC	Music		22-JAN-1992
SPRTS	Sports	✓	30-MAY-1994

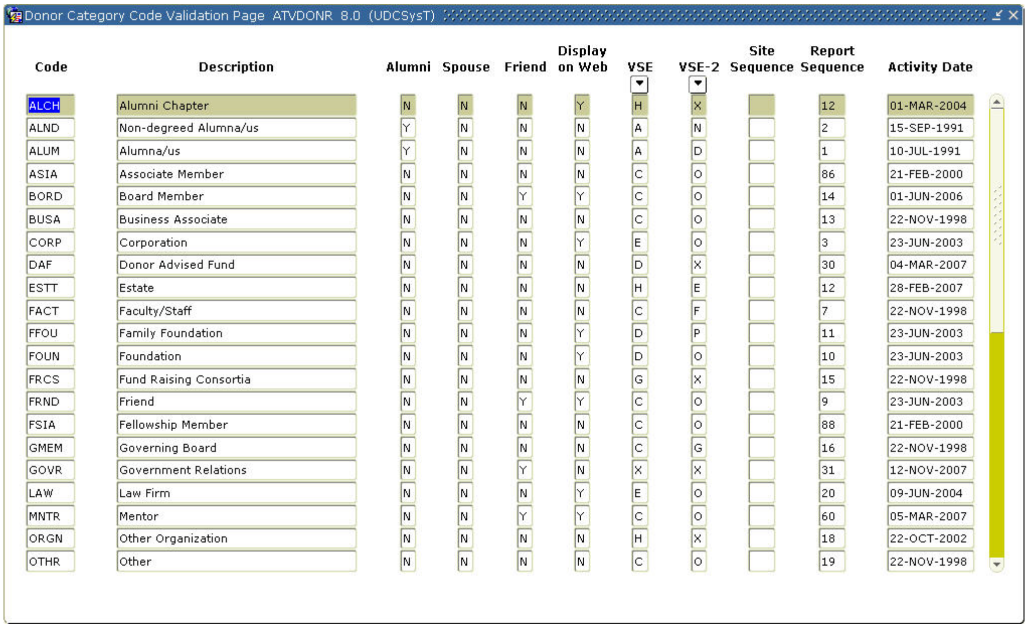
Donor Category Validation Form (ATVDONR)

The Donor Category Validation Form lets you define the classification of your records. It is used by Alumni and Friends Self-Service to enable access and to assign roles to IDs. It also determines what pages individuals have access to.

Categories with a 'Y' in the **Alum** column grant user access to the full Alumni and Friends Self-Service menu.

Categories with a 'Y' in the **Friend** column grant access to the Personal Information and Voluntary Support (make a pledge or gift) area only. That is, individuals with these codes would not have access to the Communications, Career or Volunteer Opportunities areas.

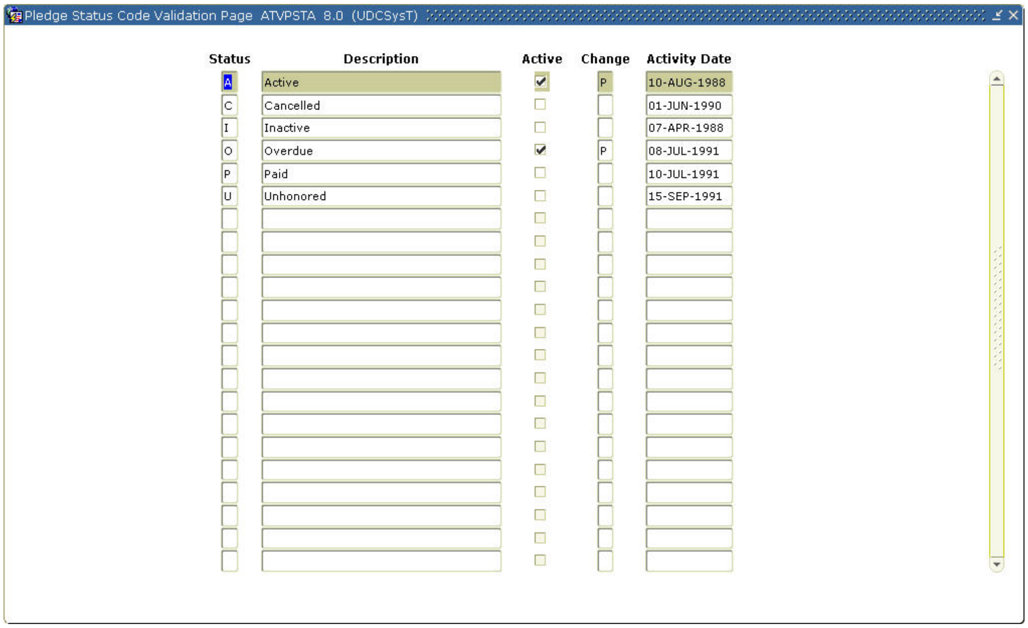
Categories with a 'Y' in the **Display on Web** column will be available for selection if a user creates a record for himself/herself in Self-Service for Alumni and Friends.


Donor Category Code Validation Page ATVDONR 8.0 (UDCSysT)

Code	Description	Alumni	Spouse	Friend	Display on Web	VSE	VSE-2	Site Sequence	Report Sequence	Activity Date
ALCH	Alumni Chapter	N	N	N	Y	H	X		12	01-MAR-2004
ALND	Non-degreed Alumna/us	Y	N	N	N	A	N		2	15-SEP-1991
ALUM	Alumna/us	Y	N	N	N	A	D		1	10-JUL-1991
ASIA	Associate Member	N	N	N	N	C	O		86	21-FEB-2000
BORD	Board Member	N	N	Y	Y	C	O		14	01-JUN-2006
BUSA	Business Associate	N	N	N	N	C	O		13	22-NOV-1998
CORP	Corporation	N	N	N	Y	E	O		3	23-JUN-2003
DAF	Donor Advised Fund	N	N	N	N	D	X		30	04-MAR-2007
ESTT	Estate	N	N	N	N	H	E		12	28-FEB-2007
FACT	Faculty/Staff	N	N	N	N	C	F		7	22-NOV-1998
FFOU	Family Foundation	N	N	N	Y	D	P		11	23-JUN-2003
FOUN	Foundation	N	N	N	Y	D	O		10	23-JUN-2003
FRCS	Fund Raising Consortia	N	N	N	N	G	X		15	22-NOV-1998
FRND	Friend	N	N	Y	Y	C	O		9	23-JUN-2003
FSIA	Fellowship Member	N	N	N	N	C	O		88	21-FEB-2000
GMEM	Governing Board	N	N	N	N	C	G		16	22-NOV-1998
GOVR	Government Relations	N	N	Y	N	X	X		31	12-NOV-2007
LAW	Law Firm	N	N	N	Y	E	O		20	09-JUN-2004
MNTR	Mentor	N	N	Y	Y	C	O		60	05-MAR-2007
ORGN	Other Organization	N	N	N	N	H	X		18	22-OCT-2002
OTHR	Other	N	N	N	N	C	O		19	22-NOV-1998

Pledge Status Code Validation Form (ATVPSTA)

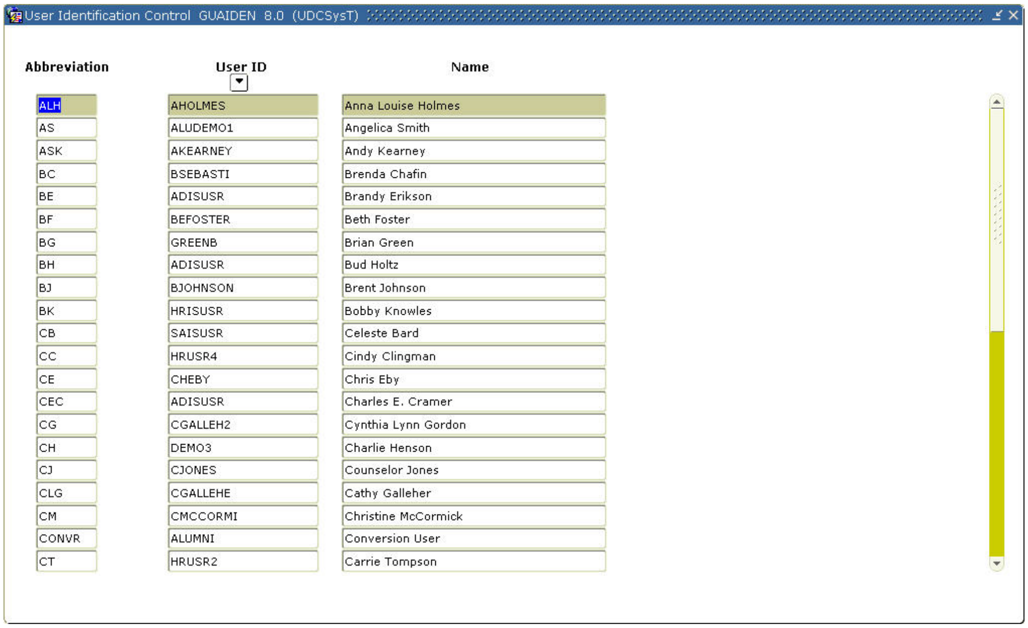
Pledge Status Code Validation Form lets you define the status codes that are assigned to pledges. It is used in Alumni and Friends Self-Service to identify the default pledge status on pledges made via the Web.


Pledge Status Code Validation Page ATVPSTA 8.0 (UDCSysT)

Status	Description	Active	Change	Activity Date
A	Active	✔	P	10-AUG-1988
C	Cancelled			01-JUN-1990
I	Inactive			07-APR-1988
O	Overdue	✔	P	08-JUL-1991
P	Paid			10-JUL-1991
U	Unhonored			15-SEP-1991

User Identification Control Form (GUAIDEN)

User Identification Control Form (GUAIDEN) associates system IDs with names of users, and validates supervisor IDs entered on the Advancement Control Form (AGACTRL). It is used in Alumni and Friends Self-Service to identify the default user assigned to all comments entered by constituents via the Internet, and to assign a user to be notified of new records and new gifts.

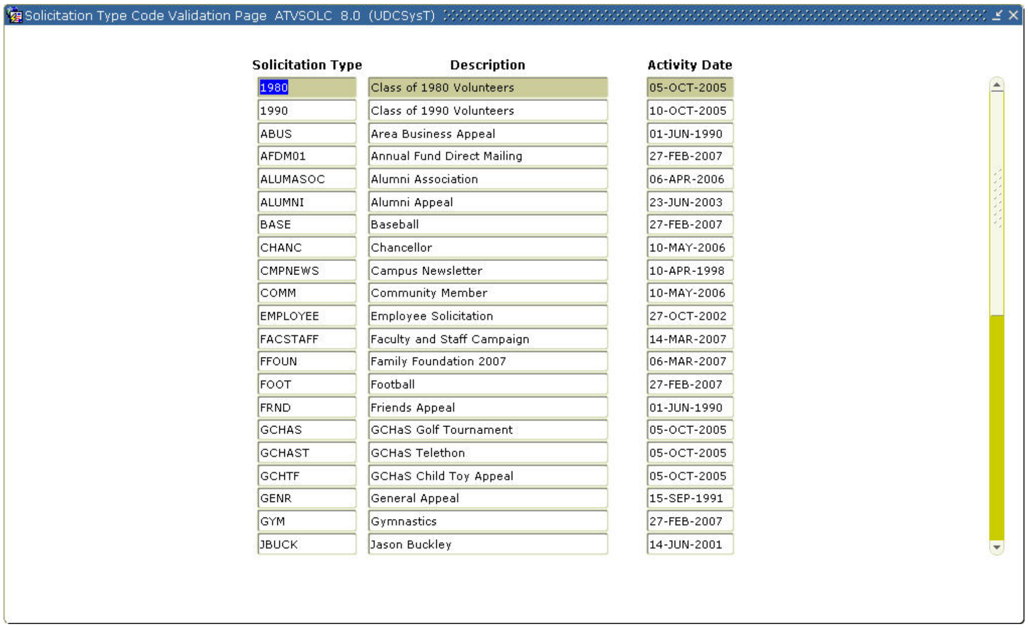


User Identification Control GUAIDEN 8.0 (UDCSysT)

Abbreviation	User ID	Name
ALH	AHOLMES	Anna Louise Holmes
AS	ALUDEMO1	Angelica Smith
ASK	AKEARNEY	Andy Kearney
BC	BSEBASTI	Brenda Chafin
BE	ADISUSR	Brandy Erikson
BF	BEFOSTER	Beth Foster
BG	GREENB	Brian Green
BH	ADISUSR	Bud Holtz
BJ	BJOHNSON	Brent Johnson
BK	HRISUSR	Bobby Knowles
CB	SAISUSR	Celeste Bard
CC	HRUSR4	Cindy Clingman
CE	CHEBY	Chris Eby
CEC	ADISUSR	Charles E. Cramer
CG	CGALLEH2	Cynthia Lynn Gordon
CH	DEMO3	Charlie Henson
CJ	CJONES	Counselor Jones
CLG	CGALLEHE	Cathy Galleher
CM	CMCCORMI	Christine McCormick
CONVR	ALUMNI	Conversion User
CT	HRUSR2	Carrie Tompson

Solicitation Type Code Validation Form (ATVSOLC)

Solicitation Type Code Validation Form (ATVSOLC) lets you define codes and descriptions identifying solicitation techniques for raising money. It is used in Alumni and Friends Self-Service to identify the default solicitation type assigned to all pledges entered via the Web.


Solicitation Type Code Validation Page ATVSOLC 8.0 (UDCSysT)

Solicitation Type	Description	Activity Date
1980	Class of 1980 Volunteers	05-OCT-2005
1990	Class of 1990 Volunteers	10-OCT-2005
ABUS	Area Business Appeal	01-JUN-1990
AFDM01	Annual Fund Direct Mailing	27-FEB-2007
ALUMASOC	Alumni Association	06-APR-2006
ALUMNI	Alumni Appeal	23-JUN-2003
BASE	Baseball	27-FEB-2007
CHANC	Chancellor	10-MAY-2006
CMPNEWS	Campus Newsletter	10-APR-1998
COMM	Community Member	10-MAY-2006
EMPLOYEE	Employee Solicitation	27-OCT-2002
FACSTAFF	Faculty and Staff Campaign	14-MAR-2007
FFOUN	Family Foundation 2007	06-MAR-2007
FOOT	Football	27-FEB-2007
FRND	Friends Appeal	01-JUN-1990
GCHAS	GCHaS Golf Tournament	05-OCT-2005
GCHAST	GCHaS Telethon	05-OCT-2005
GCHTF	GCHaS Child Toy Appeal	05-OCT-2005
GENR	General Appeal	15-SEP-1991
GYM	Gymnastics	27-FEB-2007
JBUCK	Jason Buckley	14-JUN-2001

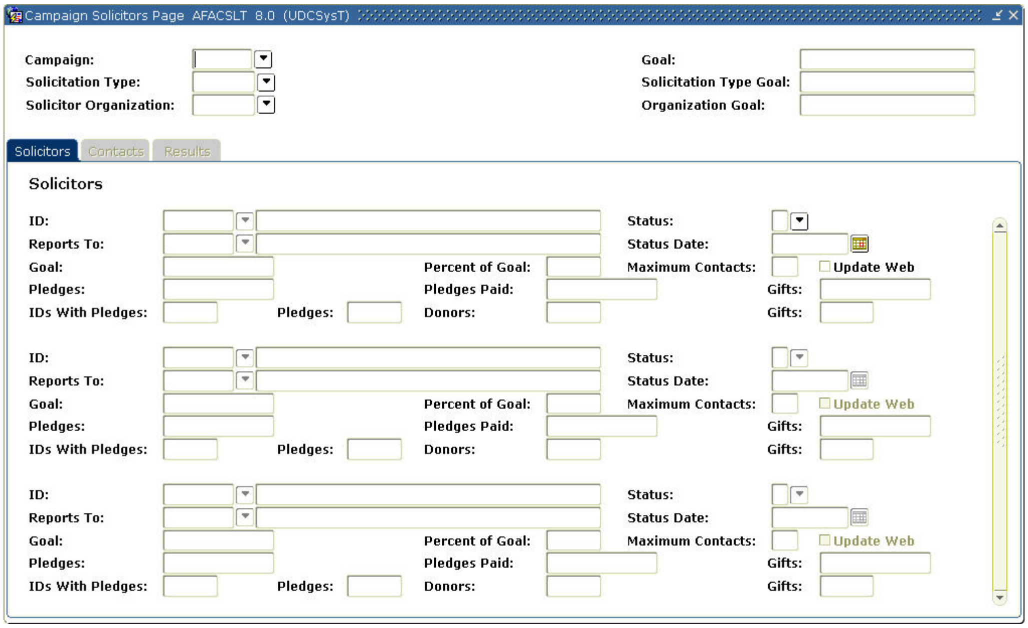
Forms that impact what displays

The following Banner forms impact information that displays in Alumni and Friends Self-Service.

Campaign Solicitors Form (AFACSLT)

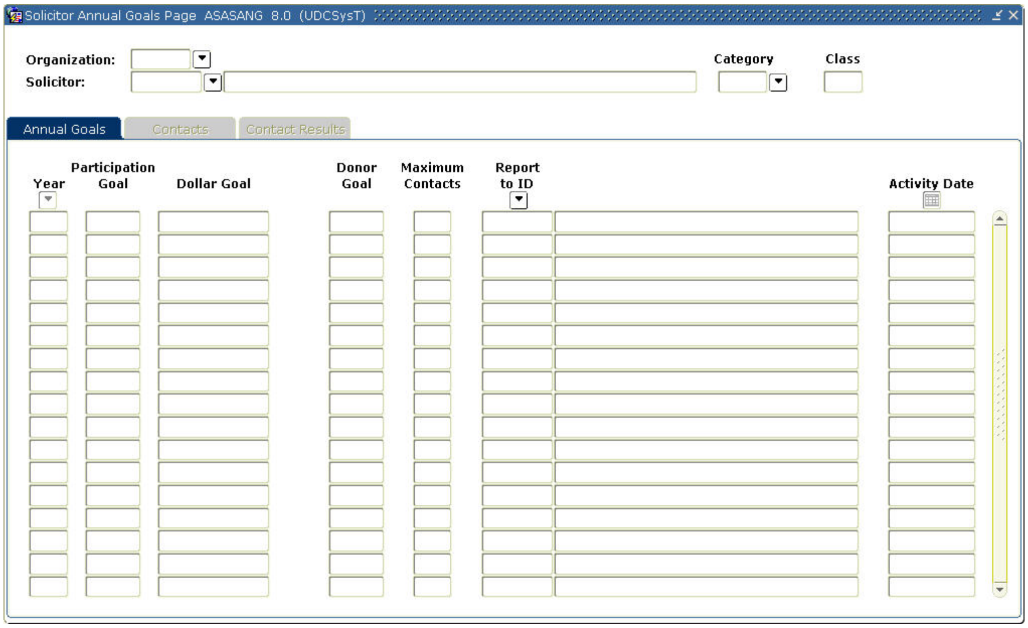
The Campaign Solicitors Form (AFACSLT) is used to track the overall results of solicitors within a solicitor organization when using the Campaign Method of Solicitor Organization.

Check the **Update Web Ind** check box to indicate if this solicitor may enter results for their contacts via the Web.



Solicitor Annual Goals Form (ASASANG)

The Solicitor Annual Goals Form (ASASANG) defines annual goals for a solicitor within a solicitor organization when using the Year Method of Solicitor Organization. The form is also used to assign contacts to a solicitor for a year.



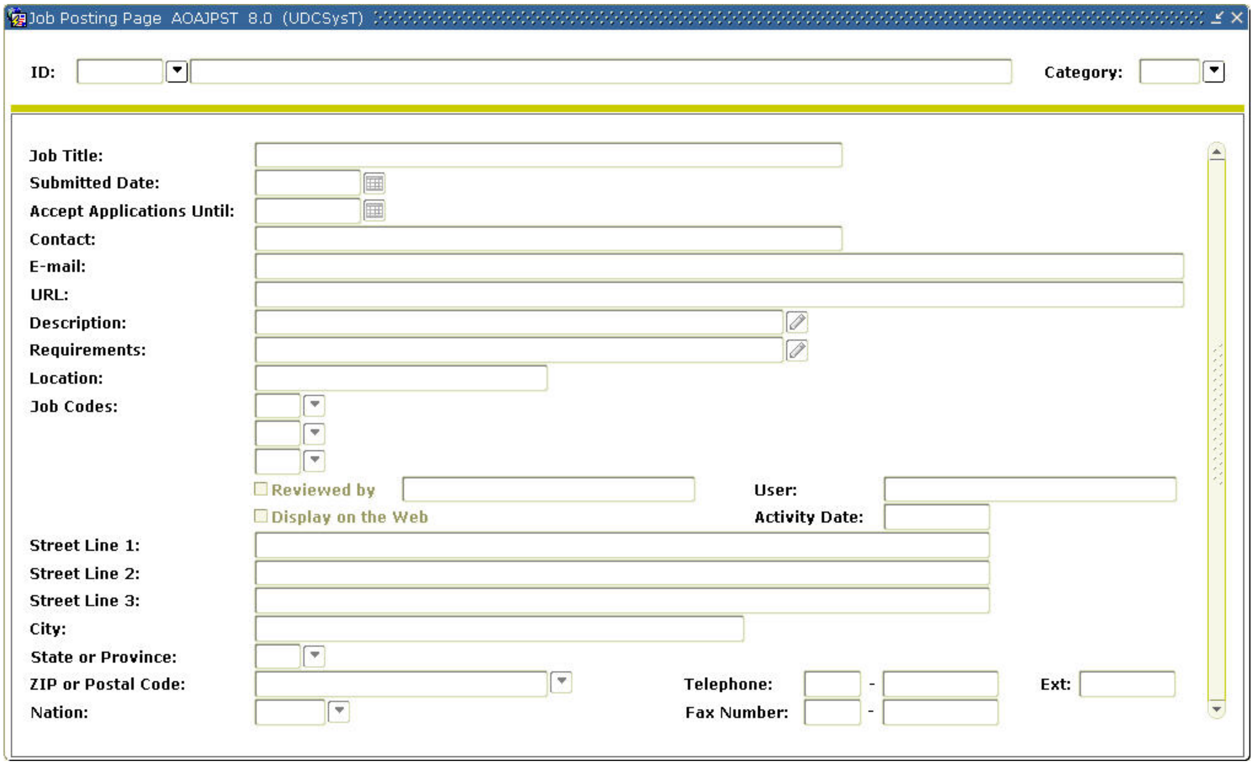
Job Posting Form (AOAJPST)

Job Posting Form (AOAJPST) is used to store job posting information for an existing, valid organization. You can enter data on the form directly or via the Web.

Job posting information is stored on this form including the title and description of the position being posted, the dates within which the job is accepting applications, contact person, email address, a field for an URL address reviewer, job requirements and location.

The information entered displays on the Web if the **Display on the Web** check box is checked. There is also a rule in Advancement DataTailor that sets whether job postings must be reviewed by a staff person before it is displayed on the Web.

Note: Up to 32,000 characters can be used to describe job duties, responsibilities, and requirements in the requirements field.



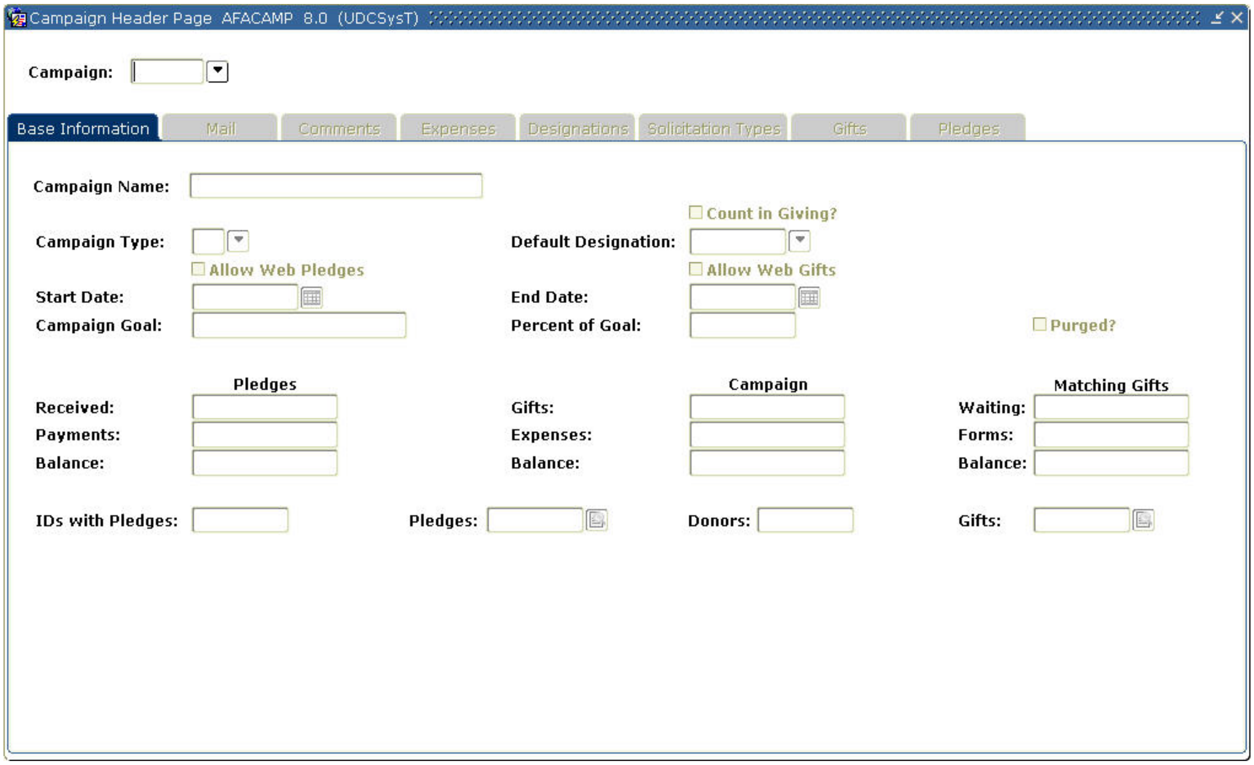
Campaign Header Form (AFACAMP)

Campaign Header Form (AFACAMP) establishes a campaign on the system. This is the initial form for each campaign that is added to the database, and is used to maintain information such as monetary goals and date ranges on each campaign.

Check the **Allow Web Pledges** check box to allow pledges to be made to a specific campaign via the Web.

Check the **Allow Web Gifts** check box to allow gifts to be made to a specific campaign via the Web.

Note: The web indicators set on AFACAMP will only apply if there are no web indicators set on the AFADESG form. These default settings will be overridden by any settings made on the AFADESG form. Web validation looks at the AFADESG form for the Web indicators first and if none are found set there it looks at AFACAMP and ADADESG



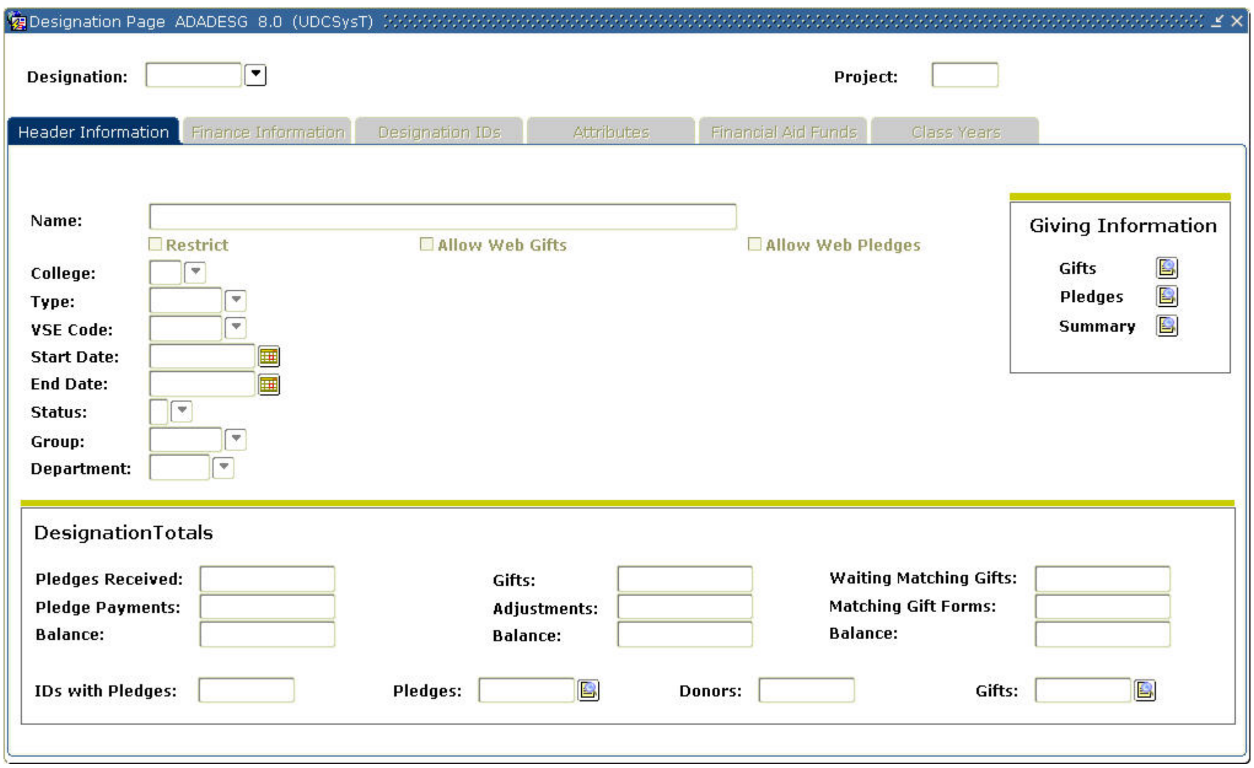
Designation Form (ADADESG)

The Designation Form (ADADESG) establishes a designation on the system. This is the initial form for each designation that is added to the database, and is used to store information about the gift accounts you maintain.

Check the **Allow Web Pledges** check box to allow pledges to be made to a specific designation via the Web.

Check the **Allow Web Gifts** check box to allow gifts to be made to a specific designation via the Web.

Note: The web indicators set on ADADESG will only apply if there are no web indicators set on the AFADESG form. These default settings will be overridden by any settings made on the AFADESG form. Web validation looks at the AFADESG form for the Web indicators first and if none are found set there it looks at AFACAMP and ADADESG

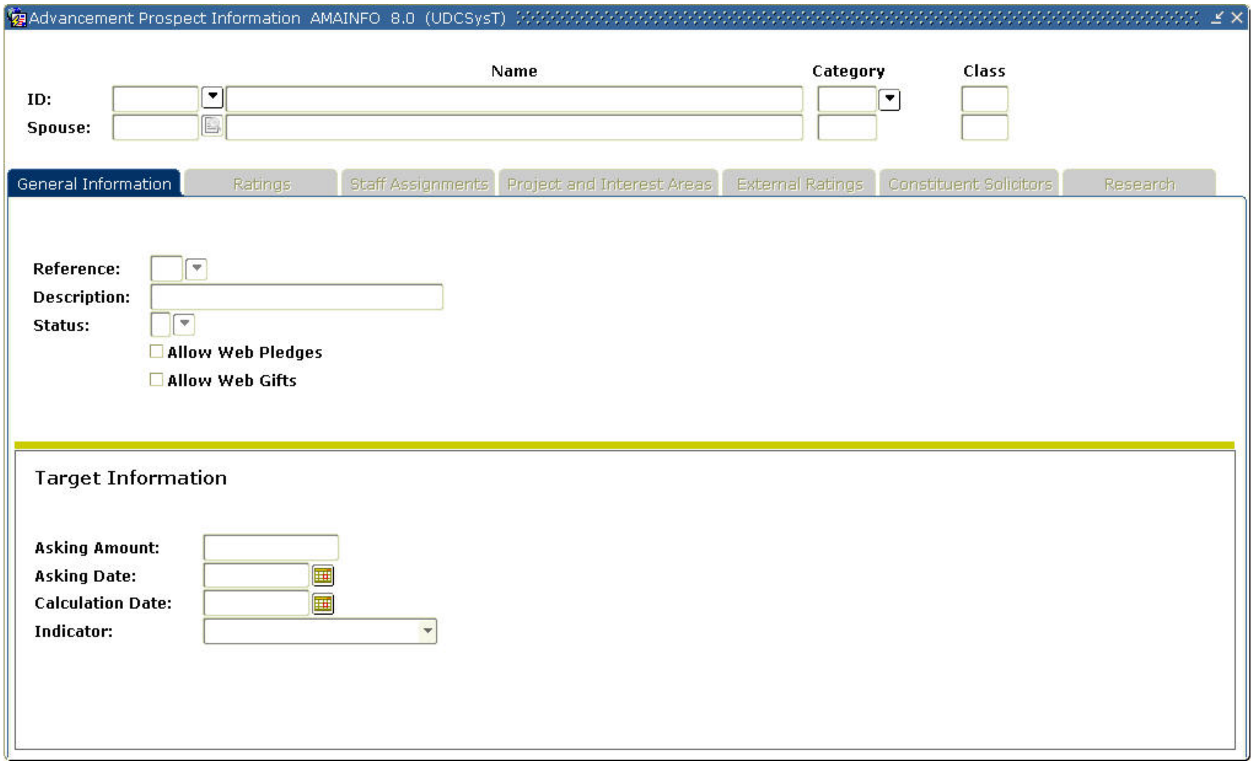


Advancement Prospect Information Form (AMAINFO)

Advancement Prospect Information Form (AMAINFO) identifies a constituent/organization as a prospect. By default, Prospects are automatically excluded from making pledges or gifts via the Web. The following indicators can override this restriction:

The **Allow Web Gifts** check box must be checked to accept gifts via the Web.

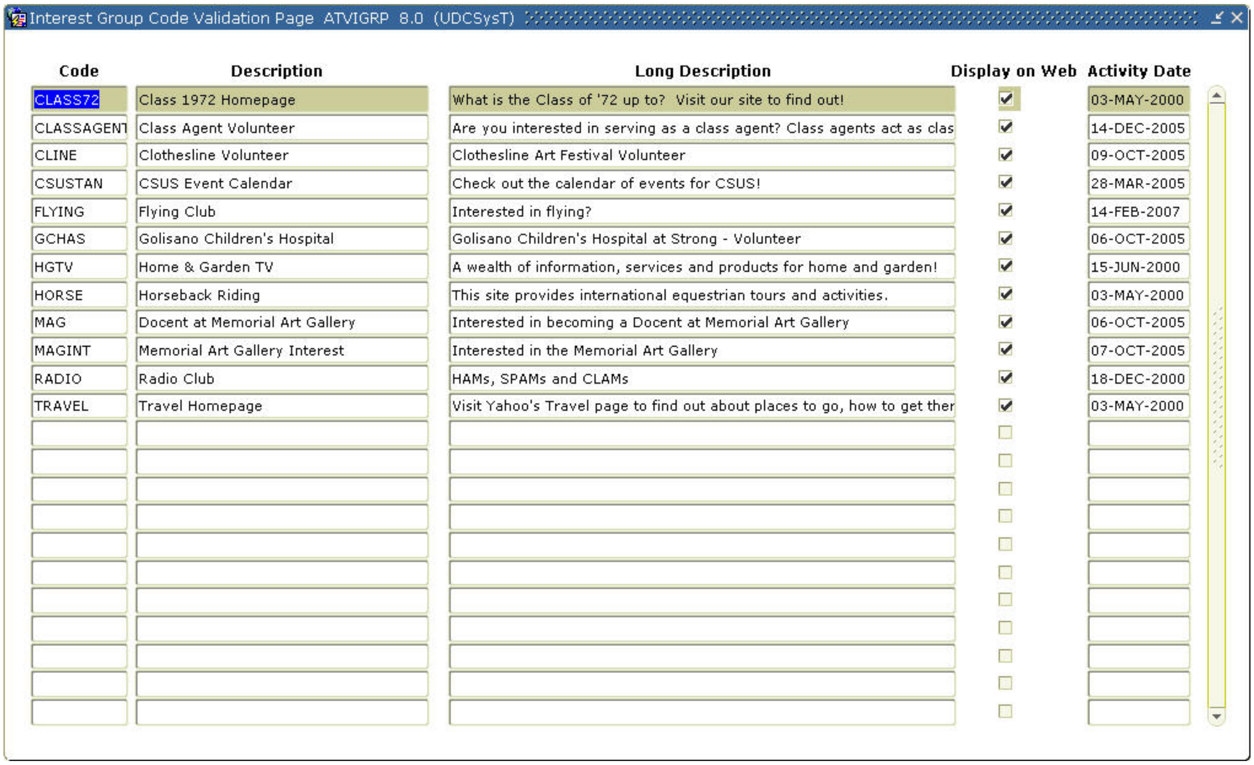
The **Allow Web Pledges** check box must be checked to accept pledges via the Web.



Interest Group Code Validation Form (ATVIGRP)

Interest Group Code Validation Form (ATVIGRP) contains the interest group **Code** field, a long and a short description of the code and the **Activity Date** field.

Check the **Display on Web** check box to allow display on the Web.



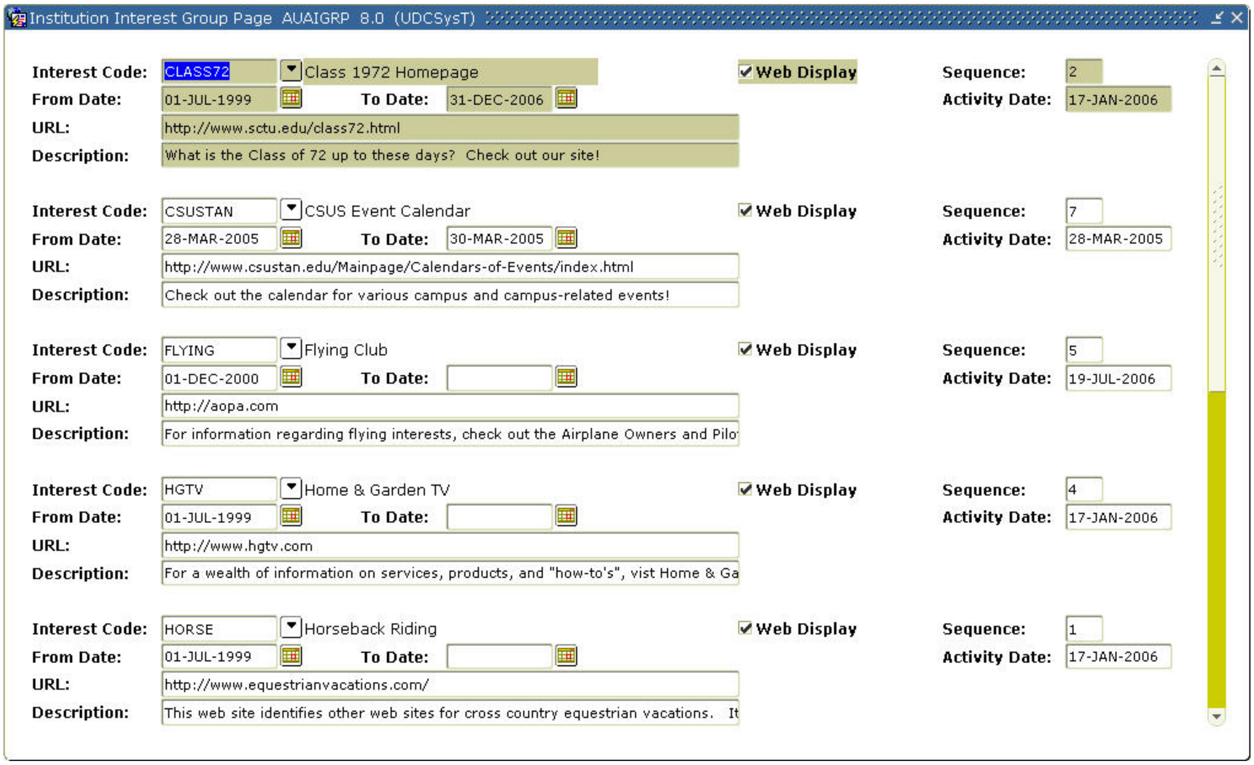
Interest Group Code Validation Page ATVIGRP 8.0 (UDCSysT)

Code	Description	Long Description	Display on Web	Activity Date
CLASS72	Class 1972 Homepage	What is the Class of '72 up to? Visit our site to find out!	✓	03-MAY-2000
CLASSAGENT	Class Agent Volunteer	Are you interested in serving as a class agent? Class agents act as clas	✓	14-DEC-2005
CLINE	Clothesline Volunteer	Clothesline Art Festival Volunteer	✓	09-OCT-2005
CSUSTAN	CSUS Event Calendar	Check out the calendar of events for CSUS!	✓	28-MAR-2005
FLYING	Flying Club	Interested in flying?	✓	14-FEB-2007
GCHAS	Golisano Children's Hospital	Golisano Children's Hospital at Strong - Volunteer	✓	06-OCT-2005
HGTV	Home & Garden TV	A wealth of information, services and products for home and garden!	✓	15-JUN-2000
HORSE	Horseback Riding	This site provides international equestrian tours and activities.	✓	03-MAY-2000
MAG	Docent at Memorial Art Gallery	Interested in becoming a Docent at Memorial Art Gallery	✓	06-OCT-2005
MAGINT	Memorial Art Gallery Interest	Interested in the Memorial Art Gallery	✓	07-OCT-2005
RADIO	Radio Club	HAMs, SPAMs and CLAMs	✓	18-DEC-2000
TRAVEL	Travel Homepage	Visit Yahoo's Travel page to find out about places to go, how to get ther	✓	03-MAY-2000

Interest Group Detail Form (AUAIGRP)

Use the Interest Group Detail Form (AUAIGRP) to enter details that are related to a particular interest such as event titles and dates, and URL addresses for more information.

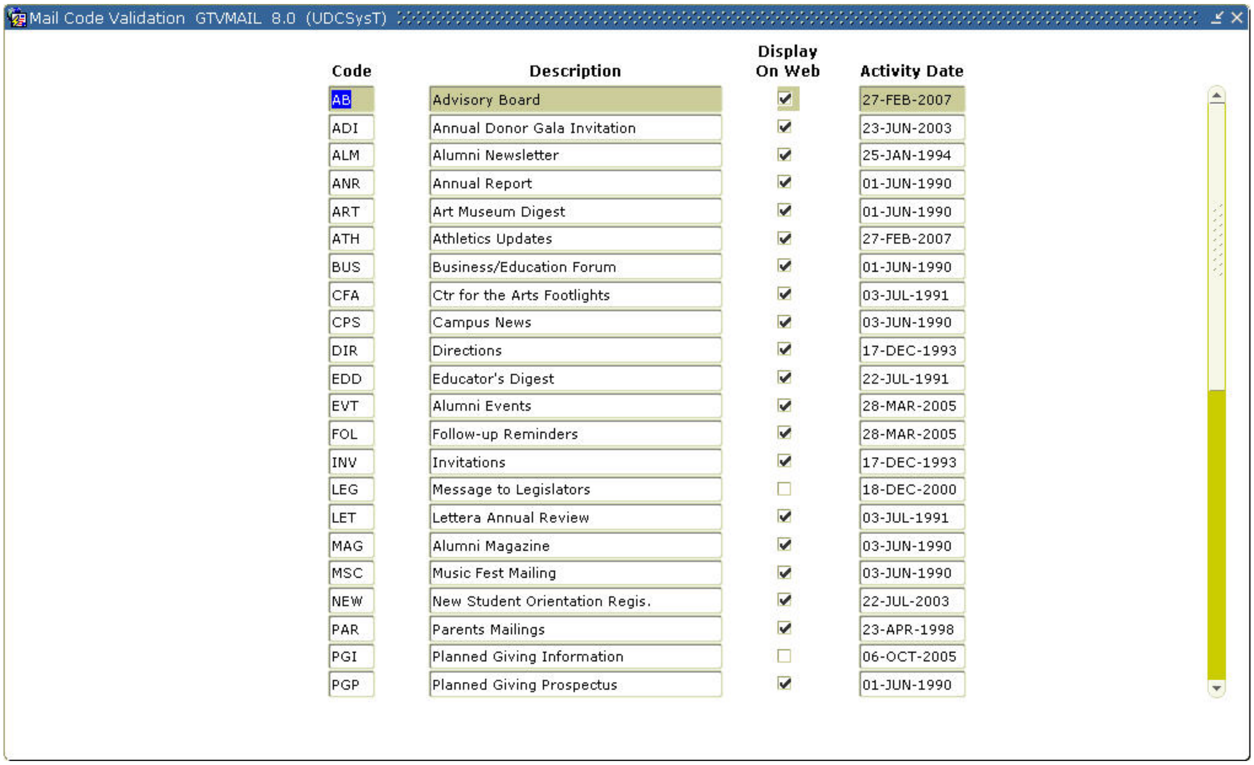
Check the **Web Display** check box to allow display on the Web.



Mail Code Validation Form (GTVMAIL)

Use the Mail Code Validation Form (GTVMAIL) to define codes that describe particular mailings.

Check the **Web Ind** check box to allow the mail code to be displayed on the Web.



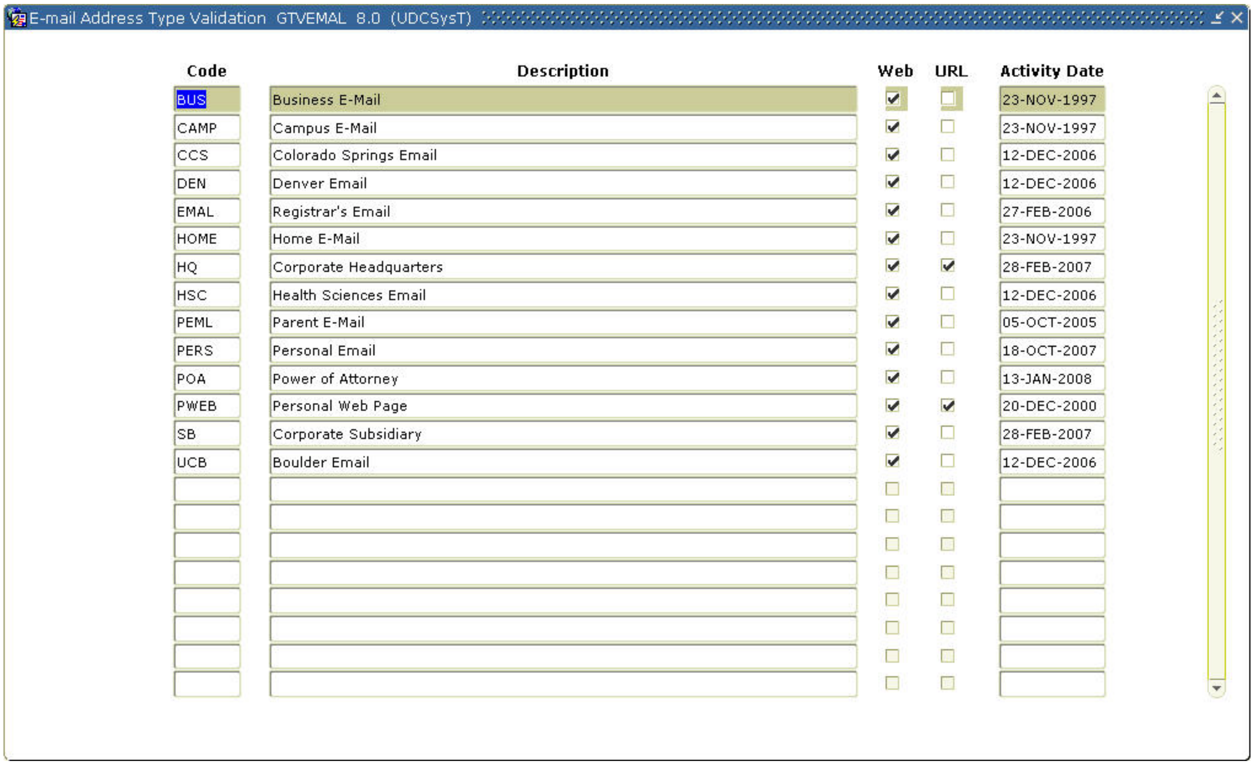
Mail Code Validation GTVMAIL 8.0 (UDCSysT)

Code	Description	Display On Web	Activity Date
AB	Advisory Board	☑	27-FEB-2007
ADI	Annual Donor Gala Invitation	☑	23-JUN-2003
ALM	Alumni Newsletter	☑	25-JAN-1994
ANR	Annual Report	☑	01-JUN-1990
ART	Art Museum Digest	☑	01-JUN-1990
ATH	Athletics Updates	☑	27-FEB-2007
BUS	Business/Education Forum	☑	01-JUN-1990
CFA	Ctr for the Arts Footlights	☑	03-JUL-1991
CPS	Campus News	☑	03-JUN-1990
DIR	Directions	☑	17-DEC-1993
EDD	Educator's Digest	☑	22-JUL-1991
EVT	Alumni Events	☑	28-MAR-2005
FOL	Follow-up Reminders	☑	28-MAR-2005
INV	Invitations	☑	17-DEC-1993
LEG	Message to Legislators	☐	18-DEC-2000
LET	Lettera Annual Review	☑	03-JUL-1991
MAG	Alumni Magazine	☑	03-JUN-1990
MSC	Music Fest Mailing	☑	03-JUN-1990
NEW	New Student Orientation Regis.	☑	22-JUL-2003
PAR	Parents Mailings	☑	23-APR-1998
PGI	Planned Giving Information	☐	06-OCT-2005
PGP	Planned Giving Prospectus	☑	01-JUN-1990

E-mail Address Type Validation Form (GTVEMAL)

Use the E-mail Address Type Validation Form (GTVEMAL) to determine which email addresses will display and/or be able to be updated via the web. If they are shared at your institution, be sure to discuss with your school's policy committee.

Check the **Web Ind** check box to allow the E-mail information with these types to be displayed on the Web.


E-mail Address Type Validation GTVEMAL 8.0 (UDCSysT)

Code	Description	Web	URL	Activity Date
BUS	Business E-Mail	☑	☐	23-NOV-1997
CAMP	Campus E-Mail	☑	☐	23-NOV-1997
CCS	Colorado Springs Email	☑	☐	12-DEC-2006
DEN	Denver Email	☑	☐	12-DEC-2006
EMAL	Registrar's Email	☑	☐	27-FEB-2006
HOME	Home E-Mail	☑	☐	23-NOV-1997
HQ	Corporate Headquarters	☑	☑	28-FEB-2007
HSC	Health Sciences Email	☑	☐	12-DEC-2006
PEML	Parent E-Mail	☑	☐	05-OCT-2005
PERS	Personal Email	☑	☐	18-OCT-2007
POA	Power of Attorney	☑	☐	13-JAN-2008
PWEB	Personal Web Page	☑	☑	20-DEC-2000
SB	Corporate Subsidiary	☑	☐	28-FEB-2007
UCB	Boulder Email	☑	☐	12-DEC-2006

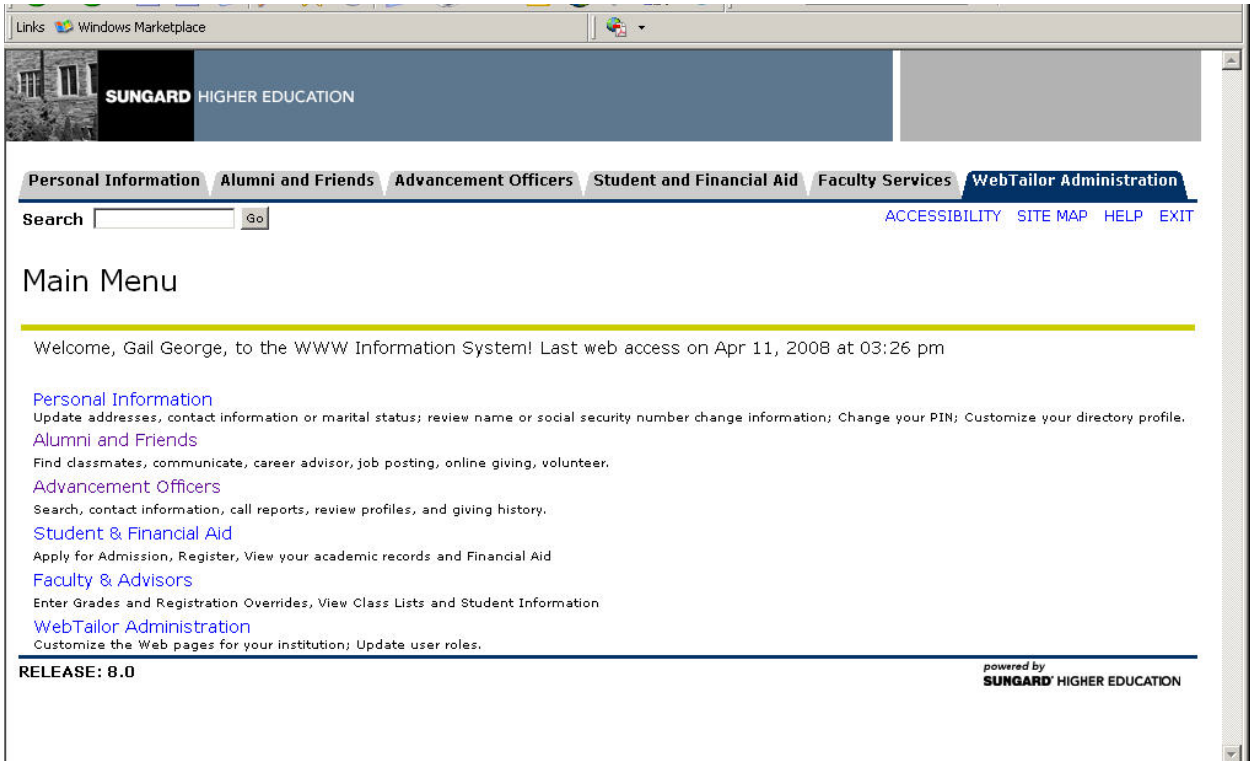
Voluntary Support

Before implementing the Voluntary Support function of Alumni and Friends Self-Service, ensure that the following codes are properly set up in WebTailor:

Customize Alumni and Friends Self-Service Rules page

- Default Solicitation code
- Default Pledge/Gift Vehicle code
- Default Pledge Status code.

View

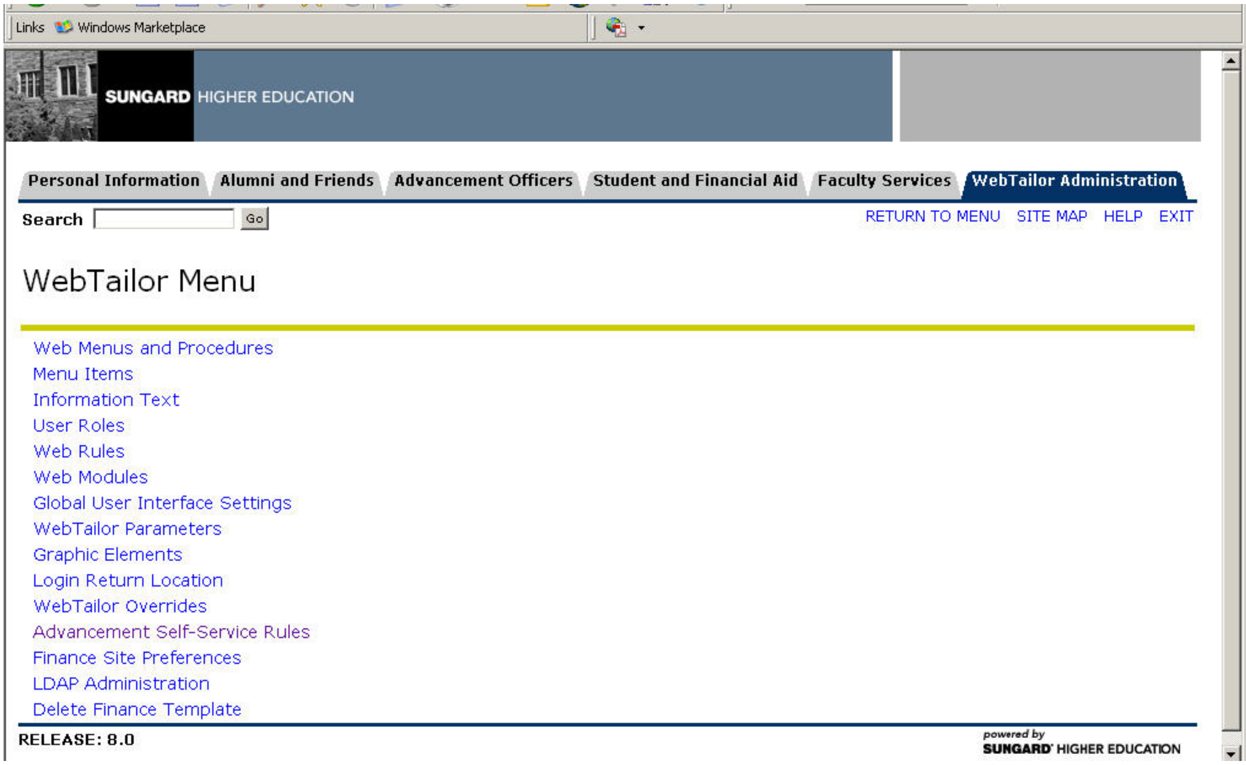


Steps

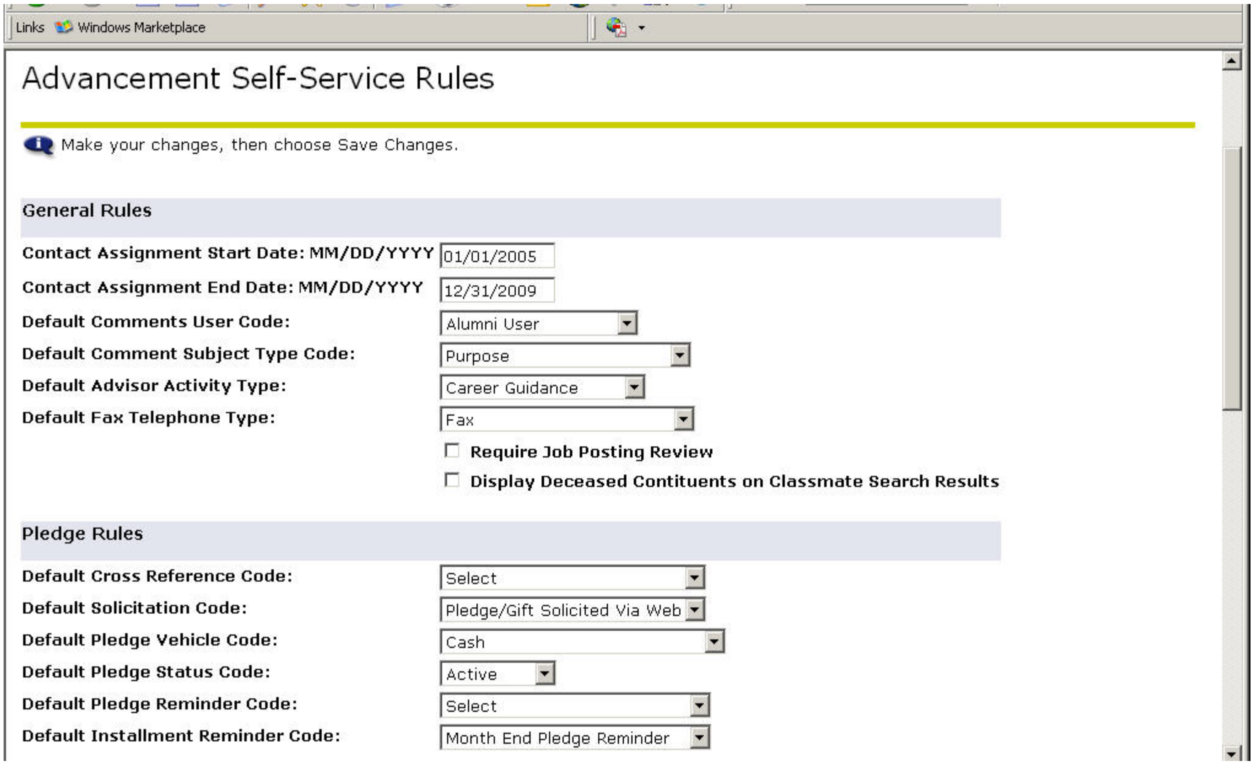
1. Select the WebTailor Administration option from the WWW Information Systems page.

   Note: Only one person should be making these changes, since they will apply to all Web users.

2. Select Advancement Self-Service Rules.



3. Go to the **Default Solicitation Code** field and select a code from the drop-down menu.



4. Select the **Default Pledge** information.

5. Select the **Default Gift** information.

6. Select the Gift options your institution decides to allow.

7. Select the Giving History Displays you want to make available via the Web.

8. Select the **Save Changes** button.

9. The message *Your changes were saved successfully* displays at the top of the screen.

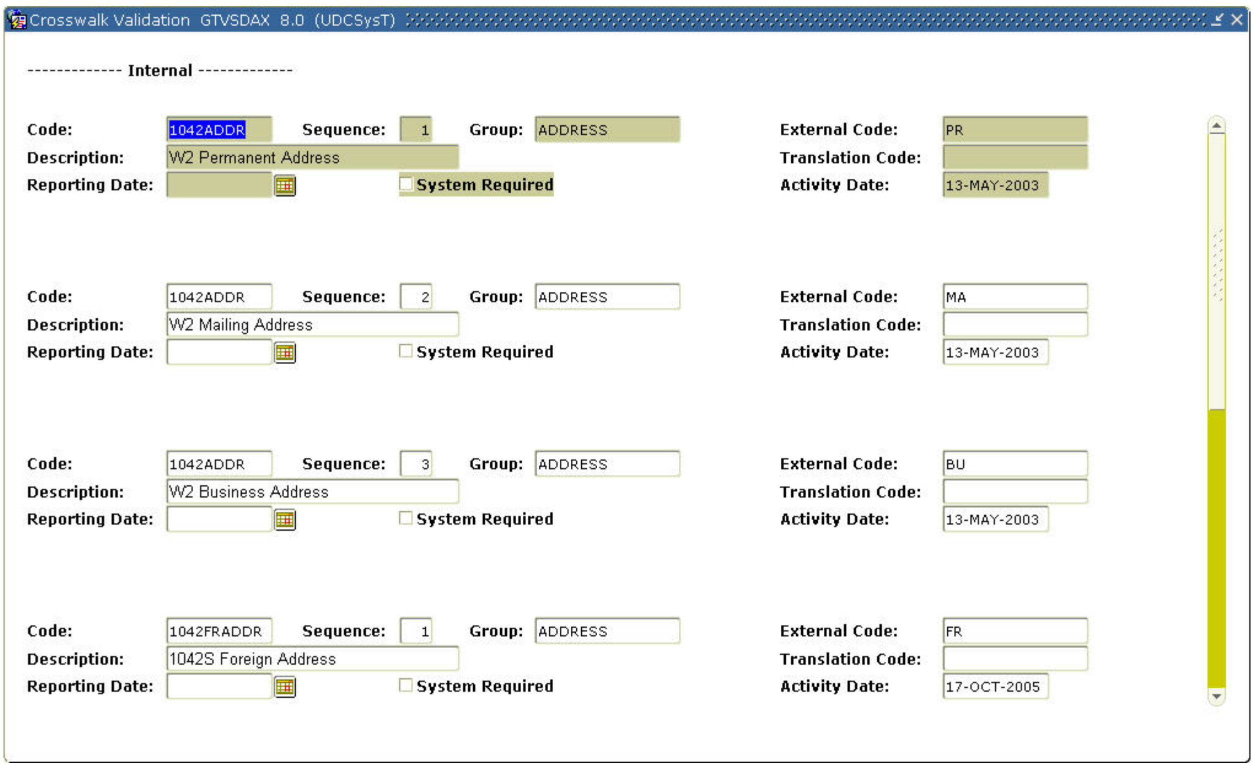
10. Return to the Alumni Services menu.

Setting Up Default Campaign/Designation Combinations

The Campaign/Designation combinations you have indicated earlier on AFACAMP will be the options your donors have to choose from when entering pledges and gifts on the web.

The Crosswalk Validation Form (GTVSDAX) provides the ability for an institution to define the order in which the campaign/designation lists are displayed when creating gifts via the web. The campaigns and designations display first based on the hierarchy entered on GTVSDAX, and then alphabetically for any not included in the GTVSDAX rules, but which have a valid date and web indicators checked on AFADESG.

View



Steps

1. Access the Crosswalk Validation Form (GTVSDAX)
2. In the **Internal Code** field, search for *DSPALUDESG.*
3. Assign the sequence number based on the hierarchy desired for display.
4. In the **External Code** field, enter the value of the campaign and designation. The first 5 digits=campaign and last 10=designation. The designation **must** begin in the sixth position.

IF	THEN
If the campaign is less than 5 digits	enter spaces to make 5 positions
	enter the designation code.

5. In the **Description** field, enter the default designation number
6. Leave the **Translation Code**, **Reporting Date** and **System Required** fields blank.
7. Click the **Insert Record** icon to enter additional combinations that you want to display at the top of the list.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Self Check

Directions

Use the information that you have learned in this workbook to complete this self check activity.

Question 1

The web products allow individuals to view and update addresses; however the institution can determines exactly what addresses may be viewed and/or updated.

True/False

Question 2

What form do you use to reset and update PIN information, disable a PIN, set a PIN expiration date?

a) Third Party Access Audit Form

b) Third Party Access Form

c) Directory Options Rules

d) Interest Group Code Validation

Question 3

The Web User Directory Form stores constituent modifications to their personal directory profile.

True/False

Question 4

Each address type maintained in Banner can have rules established on the Address Update form to identify the access available for each role.

True/False

Question 5

What form lets you define the status codes that are assigned to pledges?

a) Pledge Mass Entry

b) Pledge Form

c) Pledge Status Code Validation

d) None of these

Answer Key

Question 1

The web products allow individuals to view and update addresses; however the institution can determines exactly what addresses may be viewed and/or updated.

True

Question 2

What form do you use to reset and update PIN information, disable a PIN, set a PIN expiration date?

a) Third Party Access Audit Form

b) Third Party Access Form

c) Directory Options Rules

d) Interest Group Code Validation

Question 3

The Web user Directory Form stores constituent modifications to their personal directory profile

True

Question 4

Each address type maintained in Banner can have rules established on the Address Update form to identify the access available for each role.

False. Each address type maintained in Banner can have rules established on the Address Role Privileges Form to identify the access available for each role.

Question 5

What form let you define the status codes that are assigned to pledges?

a) Pledge Mass Entry

b) Pledge Form

c) Pledge Status Code Validation

d) None of these

Day-to-Day Operations

Introduction

Alumni and Friends Self-Service enables your institution to deliver current information and optimal service to constituents, that is, persons who have a defined relationship to the Advancement offices in the Banner system. Examples of constituents include alumni, parents, friends, volunteers, staff, faculty, and trustees. The application gives these individuals access to information in the Banner Advancement System and permits them to update their own records, reducing the amount of data entry required by the institution's staff.

The ability also exists to allow limited giving access to any person wishing to make donations who may not have a Banner ID or who may not know their Banner ID. All details shared via this access are available for review and processing within the Banner Advancement System. Once reviewed, the donor will have access to the Alumni and Friends menu in Self-Service for Alumni and Friends.

Section goal

The goal of this section is to familiarize you with Banner Alumni and Friends Self-Service, identify the functions offered in Banner Alumni and Friends Self-Service, and follow the processes necessary to enter appropriate information into the Banner System via the Web.

Objectives

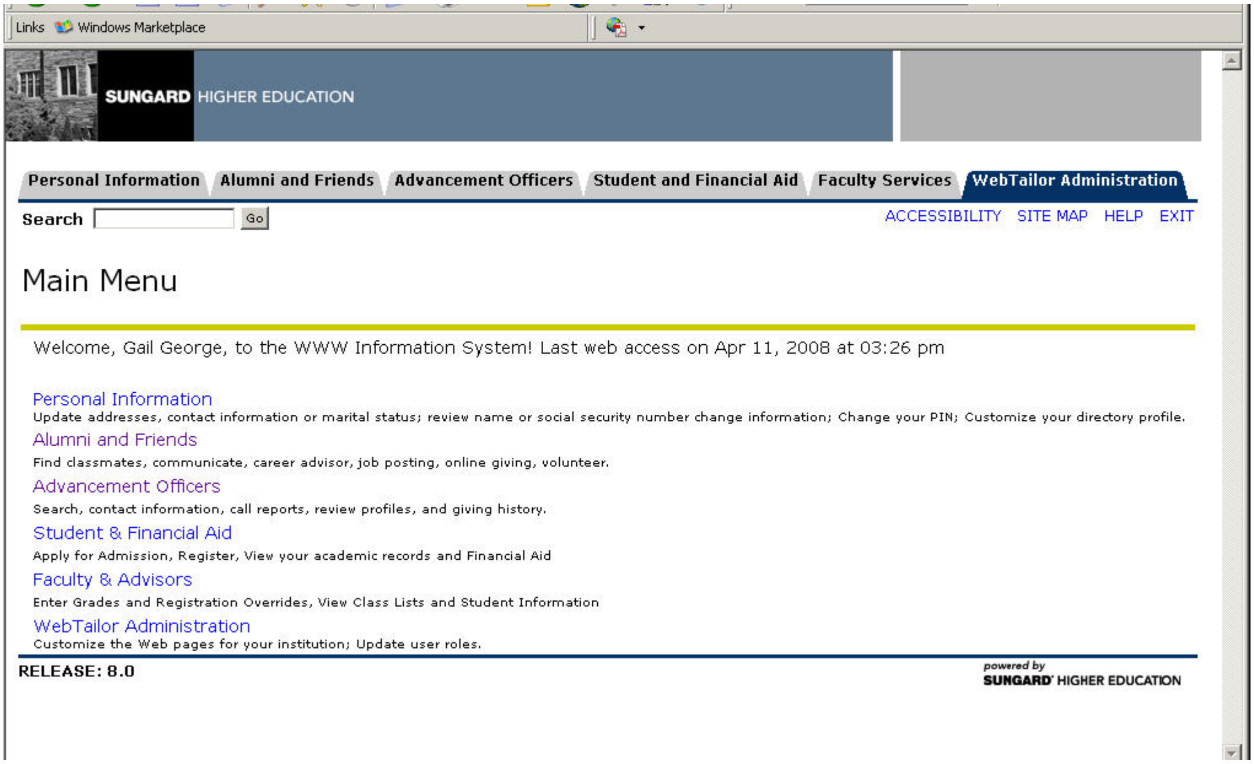
In this section you will learn how to

- communicate with an institution via Banner Alumni and Friends Self-Service
- submit a class note
- maintain a current mailing list
- respond to one or more surveys
- volunteer to help the institution
- create and update an interest profile
- create or search for job postings
- sign up to be a career mentor
- search for career mentors
- pledge support to the institution
- make a credit card donation
- create a new record in the Banner database.

Self-Service Main Menu

A constituent first accesses the Web site through a secured portal, a Login Screen, by entering a User ID and PIN. Once inside the secured area, a constituent selects from a list of menus.

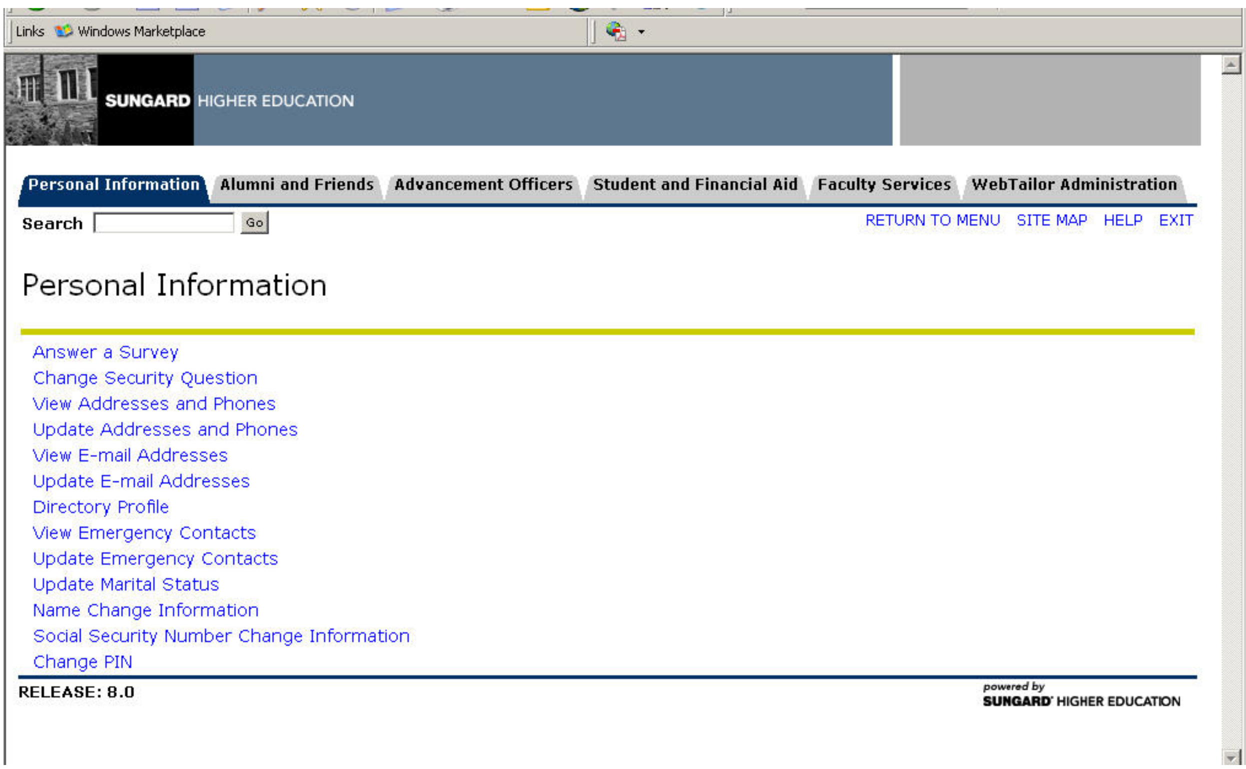
The main menu displays the items a constituent can access based on his or her role. For example, if in addition to the role of alumni a constituent is also a student, he or she has access to Student Self-Service. A student role means a record exists on SGASTDN and an alumni role means a record exists on APACONS.



Personal Information Menu

From the Personal Information menu the constituent can access:

- Changing your PIN
- Viewing or updating your address(es) or phone(s)
- Viewing or updating your email address(es)
- Directory profile
- Updating marital status
- Name change information
- Social Security Number change information
- Answering a survey



Time Out Feature

There is a system-level time-out security feature that indicates when there is no constituent activity in Alumni and Friends Self-Service and that requires a constituent to login to regain access. The constituent has added security by closing the Web browser before leaving the computer, so that no one can access the information before the system time-out.

Sending an E-mail

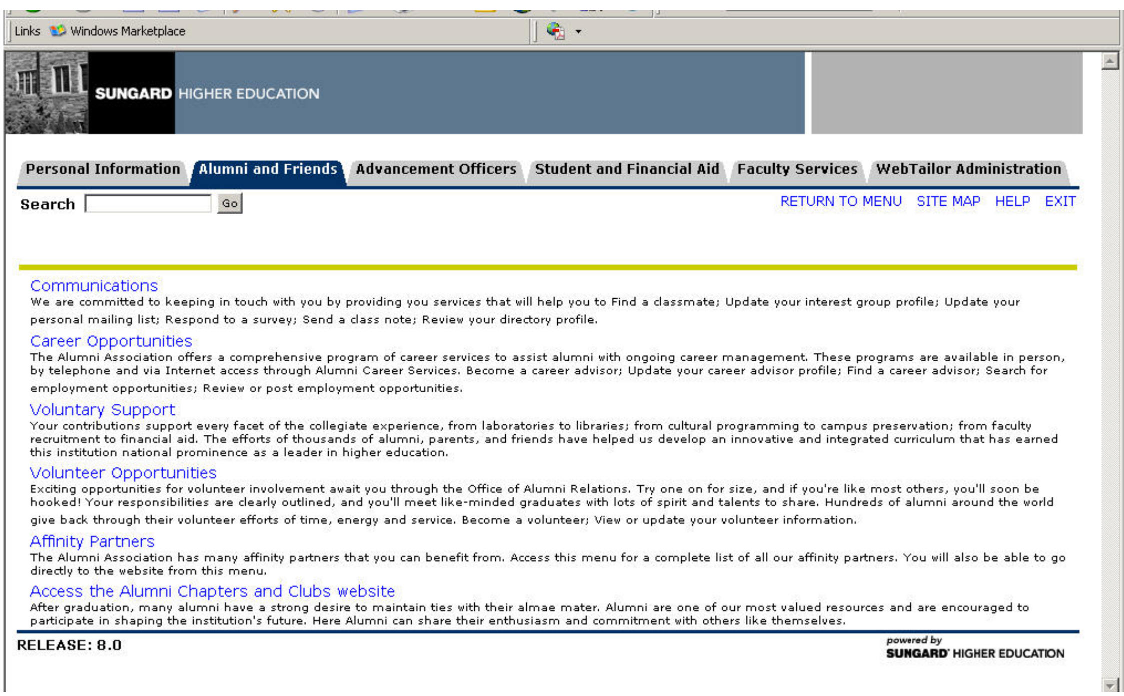
The ability to send e-mail from a Web page is dependent on the institution's environment (Web browser set up).

Accessing Alumni and Friends Self-Service

In today's world, many of your constituents are comfortable with accessing information via the Web. Alumni and Friends Self-Service provides a convenient mechanism to use so that the institution and constituents can easily communicate. For example, keeping the database current is often a difficult challenge. Surveys provide a cost-effective and timely venue for the capture of new information, but mailing surveys to your constituents is costly and potentially time-consuming. Alumni and Friends Self-Service allows you to survey your constituents easily and with little cost. You can survey a target audience by using a population selection or have a general survey for all constituents to answer.

These are just some of the options available for the Advancement staff that engages constituents. Alumni and Friends Self-Service provides:

- a low-cost communication tool between institution and constituents or between constituents.
- an effective way of gathering information changes from constituents.
- a mechanism for constituents to access and update their own records. These changes made via the Web will automatically update the database, thus reducing the need for staff to make those changes.
- a development tool for securing pledges and gifts and for tracking responses from volunteer solicitors.



Using the Communications Menu

The Communications menu of Alumni and Friends Self-Service contains functions that provide communications between alumni and the institution.

Via the Communications menu of Alumni and Friends Self-Service, the institution can provide access to the following information:

- Constituents can create an interest profile by choosing from a list of interests defined by the institution. The institution keeps them informed about those areas of interest.

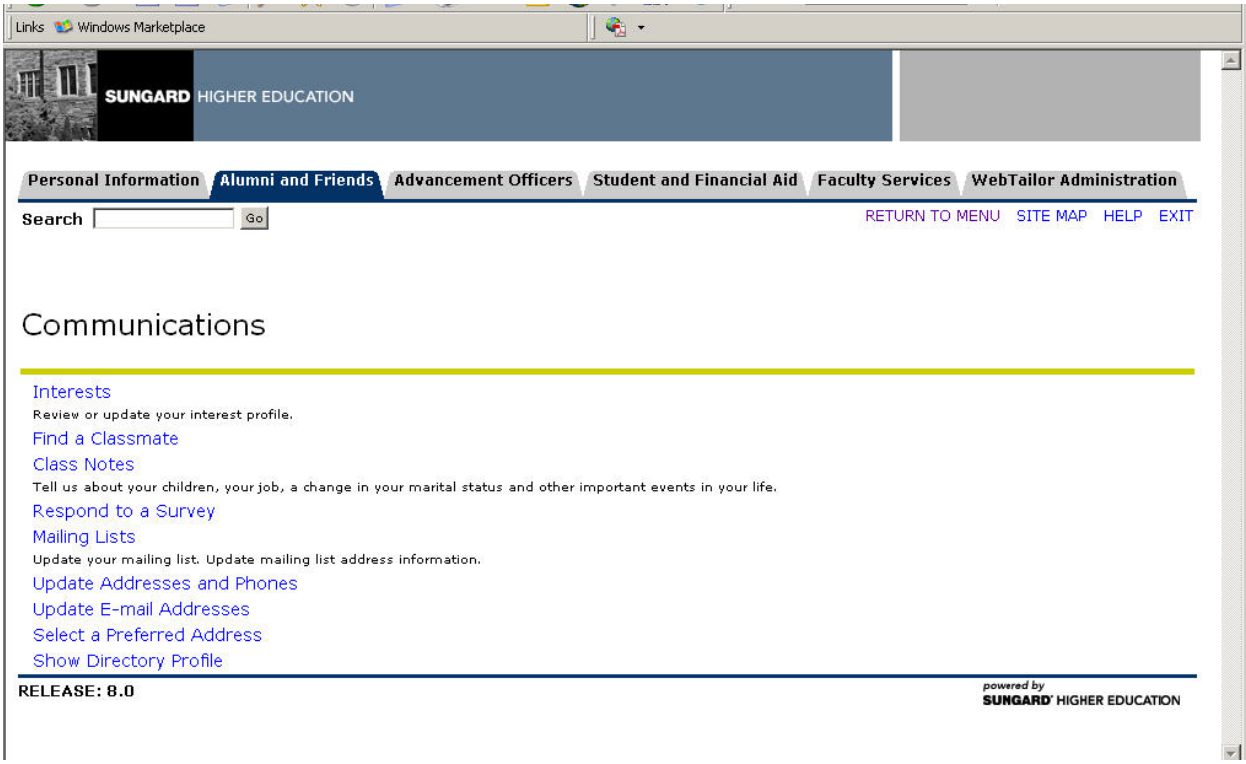
- Constituents can send a class note to the institution. The information is in freeform text. Indicators in the database control what is published in class notes and the institution can indicate the date it was included. This class note information will update the constituent comment form (APACOMT) in Banner.

- Constituents can communicate suggestions to the institution regarding the Web site through email links.

- Constituents can add or remove themselves from mailing lists and can indicate what address the mailing goes to. The institution controls what mailings can be added or removed.

- Constituents can search for classmates. The Directory Options Rule Form and the Individual Directory Profile Form determine information displayed for the classmates.

View


Links Windows Marketplace
SUNGARD HIGHER EDUCATION
Personal Information
Alumni and Friends
Advancement Officers
Student and Financial Aid
Faculty Services
WebTailor Administration
Search
Go
RETURN TO MENU
SITE MAP
HELP
EXIT
Communications
Interests
Review or update your interest profile.
Find a Classmate
Class Notes
Tell us about your children, your job, a change in your marital status and other important events in your life.
Respond to a Survey
Mailing Lists
Update your mailing list. Update mailing list address information.
Update Addresses and Phones
Update E-mail Addresses
Select a Preferred Address
Show Directory Profile
RELEASE: 8.0
powered by SUNGARD HIGHER EDUCATION

Communications – Show Directory Profile

Directory Profile

This page allows the constituent to include or exclude selected information in the directory for display on the Web.

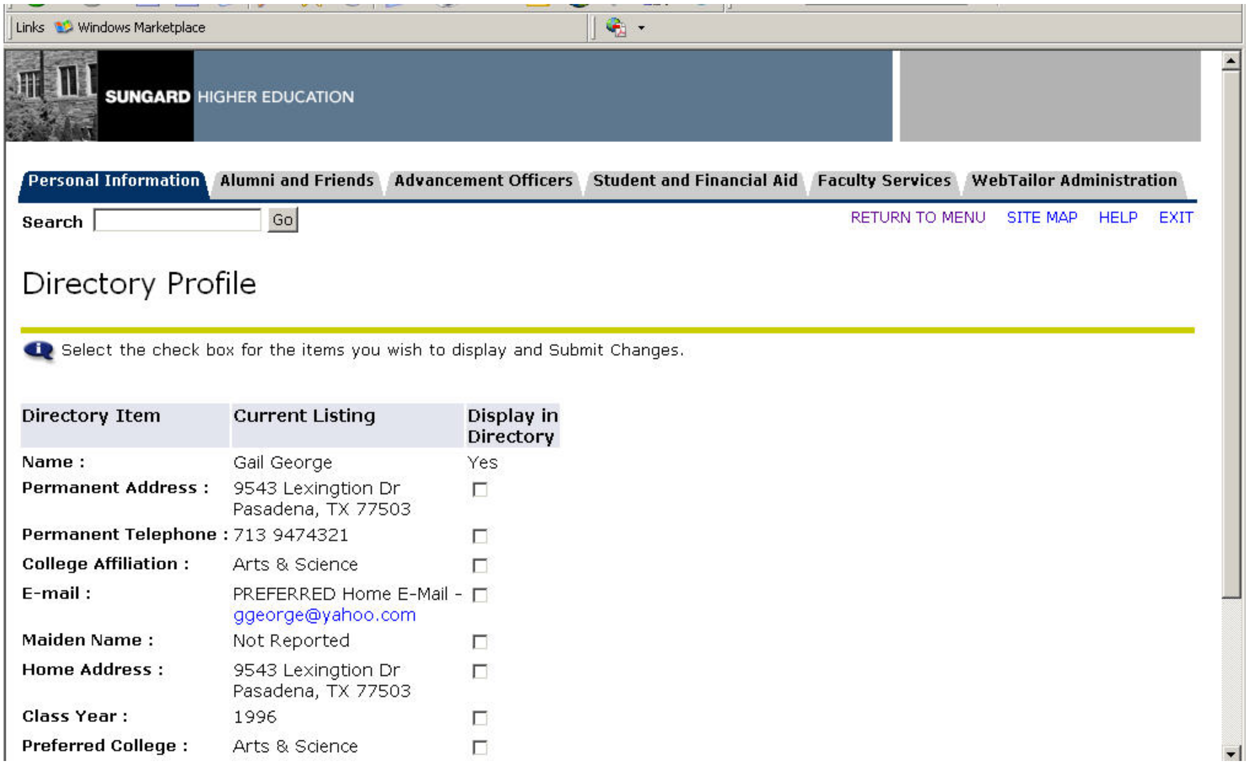
Constituents can update this information via the Web.

The institution defines default settings for what profile information displays on the Web using the Directory Options Rule Form (GOADIRO).

The institution can allow constituents to choose from the following list of items to display on the Web:

- Home address and phone
- Campus address and phone (for students and employees)
- Employer
- Business address and phone
- E-mail address
- Fax number
- Web page
- Expected graduation year (for students)
- College affiliation (for students)
- Class year
- Preferred college

View



Steps

1. From the Communications Menu of Alumni and Friends Self-Service, select Show Directory Profile.
2. The Directory Profile page displays your current information.
3. You may choose any of the items you would like to display or remove from your directory profile by selecting or deselecting the **Display in Directory** check box
4. Select the **Submit Changes** button.
5. The Personal Information menu displays the message Your *changes were saved successfully.*

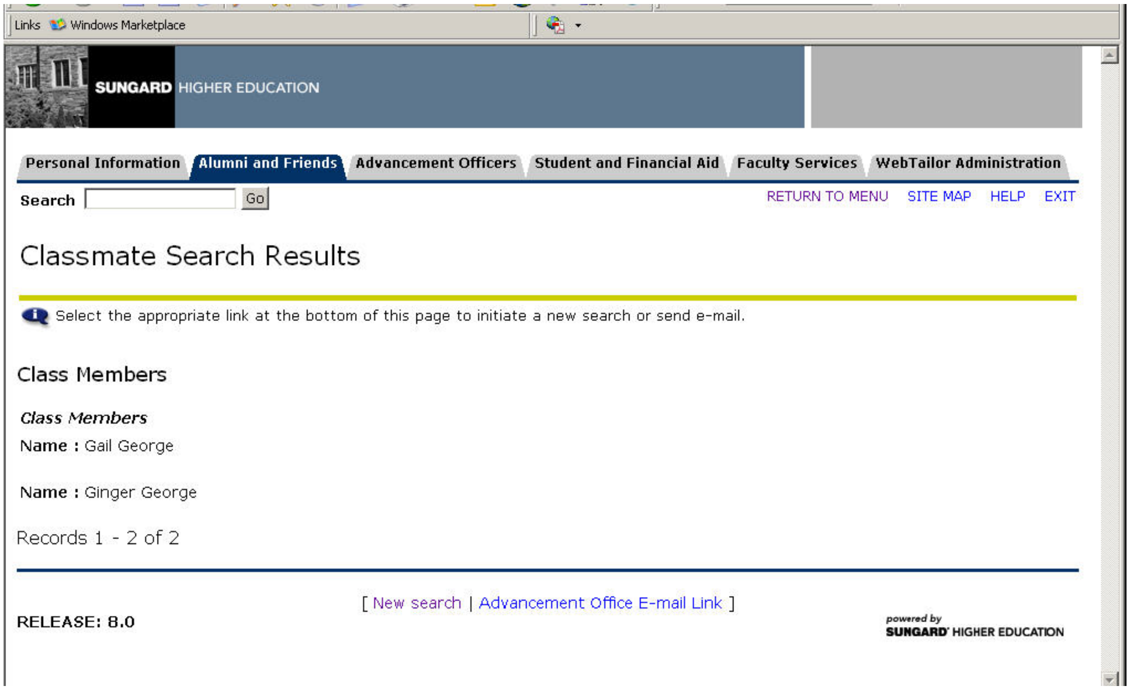
Display indicators

Verify that the ‘display in Web’ indicators in Banner impact the information displayed on the Web.

1. From the Main Menu, select Personal Information.
2. Select the Directory profile link.

   The Directory Profile page displays your current information.

3. Verify that the **Directory Items** you changed by selecting or deselecting the **Display in Directory** check box have been applied.
4. To further verify the profile change, do a search for yourself on the **Find a Classmate** option of the **Communication** menu. The search results should display the information using the profile you selected.



5. To make a change on the individual's record in Banner, access the Advancement Identification Form (APAIDEN).
6. Click the E-mail tab.
7. In the **ID** field, enter the correct ID.

8. Go to the **Display on Web** checkbox and remove the check so that the value cannot be viewed on the Web.

   Note: To make an institutional change, the display on web indicator must be removed on GTVEMAL.

9. Click the **Save** icon.

10. Click the **Exit** icon.

11. Return to the Alumni and Friends Self-Service Communication menu and Show Directory Profile and select the View E-mail addresses option.

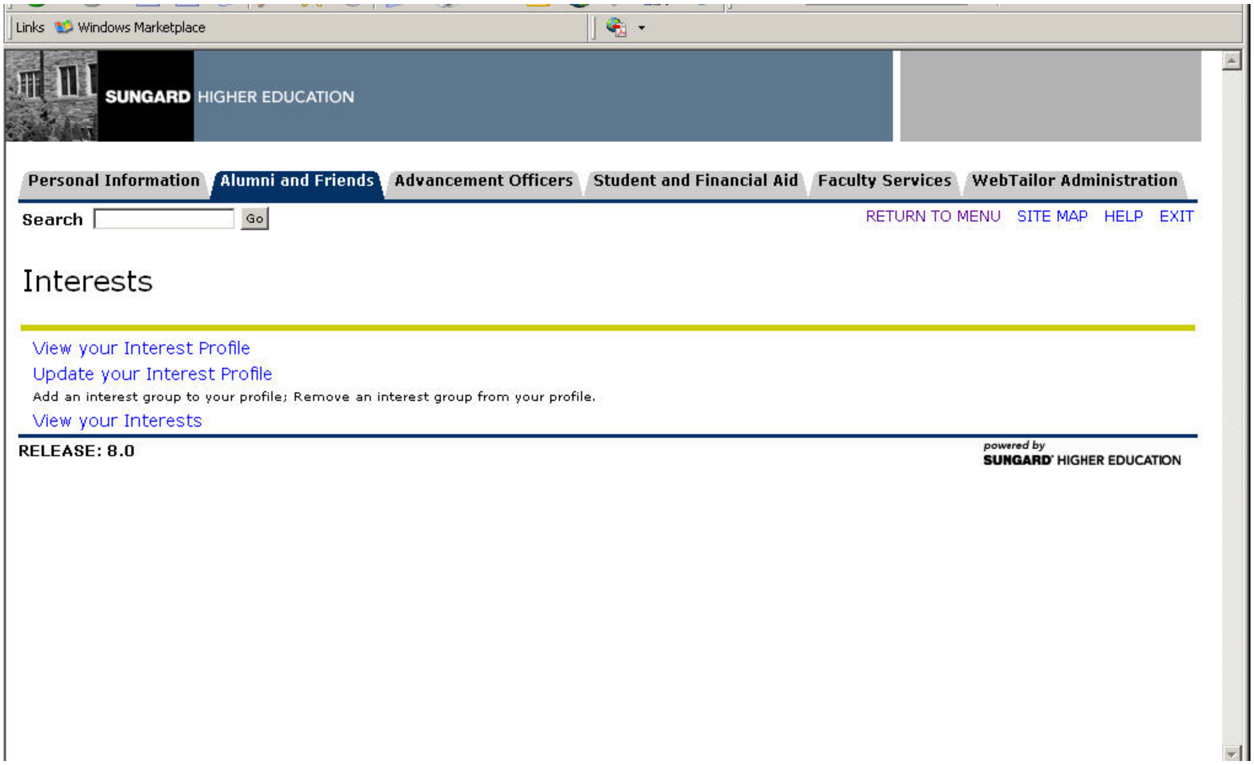
12. You should see the message *There are no e-mail addresses available for you to view*. The change you made in Banner is reflected in the Web record.

Communications – Interests

When a constituent accesses the Interests page on the Web, the following options are available:

- View Interest Profile: This option displays the interest profile including any changes made by either the constituent or the institution.
- Update Interest Profile: Use this page to add or remove an interest group.
- View areas of interest that have changed since last visit: This option is also accessible from the Communications menu.

View



What happens

Each selection navigates to its respective page or menu. Each page has hypertext that navigates to pages allowing constituents to add or remove interests from their profile. Forms in Banner define the information content and availability for the Web.

Constituents can select from interests stored in the Interest Group Validation Form (ATVIGRP), which is maintained by the Advancement staff of the institution. For example, if a constituent were interested in Broadway plays and this were an interest that the institution wanted to track; he or she could select a listing called *BROADWAY* from the list of interests available on the Web. The Advancement staff could then use this to evaluate how many persons are interested in Broadway plays and thereby determine if an event should be planned around a play or if an alumni trip should be scheduled to New York.

A URL address takes the constituent to a Web site to see more information about the named interest. In addition, note the navigation options to Add To Your Profile or Remove From Your Profile that update the profile. The URLs associated with each interest are entered and maintained in Banner on AUAIGRP.

Supporting Forms

Interest Group Validation Form (ATVIGRP)

- Interest codes and definitions are defined on ATVIGRP.
- Check the **Display on Web** check box to allow the data to display on the Web.
- Define new interest groups that constituents can sign up for on the Web.

Interest Group Detail Form (AUAIGRP)

- Use AUAIGRP to set up interest detail for the interest group including a URL the constituent can use to access information websites.
- Check the **Display on Web** check box to allow the data to display on the Web.
- Select valid codes from the Interest Group Code Validation Form (ATVIGRP).
- Information entered on this form displays for those constituents who have selected a defined interest in their profile.
- Constituents can view active events in their interest groups from the Web, such as a new Broadway show or other interest entered by the institution and selected by the constituent.
- Banner uses the last activity date that a constituent logged in and compares it with the last update of the items in the constituent's interest profile.

Constituent Interest Group Form (APAIGRP)

- Interest profile information for a constituent is stored on the Constituent Interest Group Form (APAIGRP).
- Constituent Interests can be updated by the institution on this form or by the Constituent via Alumni and Friends Self-Service. This form is updated directly with any interests added or removed via the Internet.
- Check the **Display on Web** check box to allow the data to display on the Web. (This check box defaults based on the codes in ATVIGRP but can be overwritten for an individual).

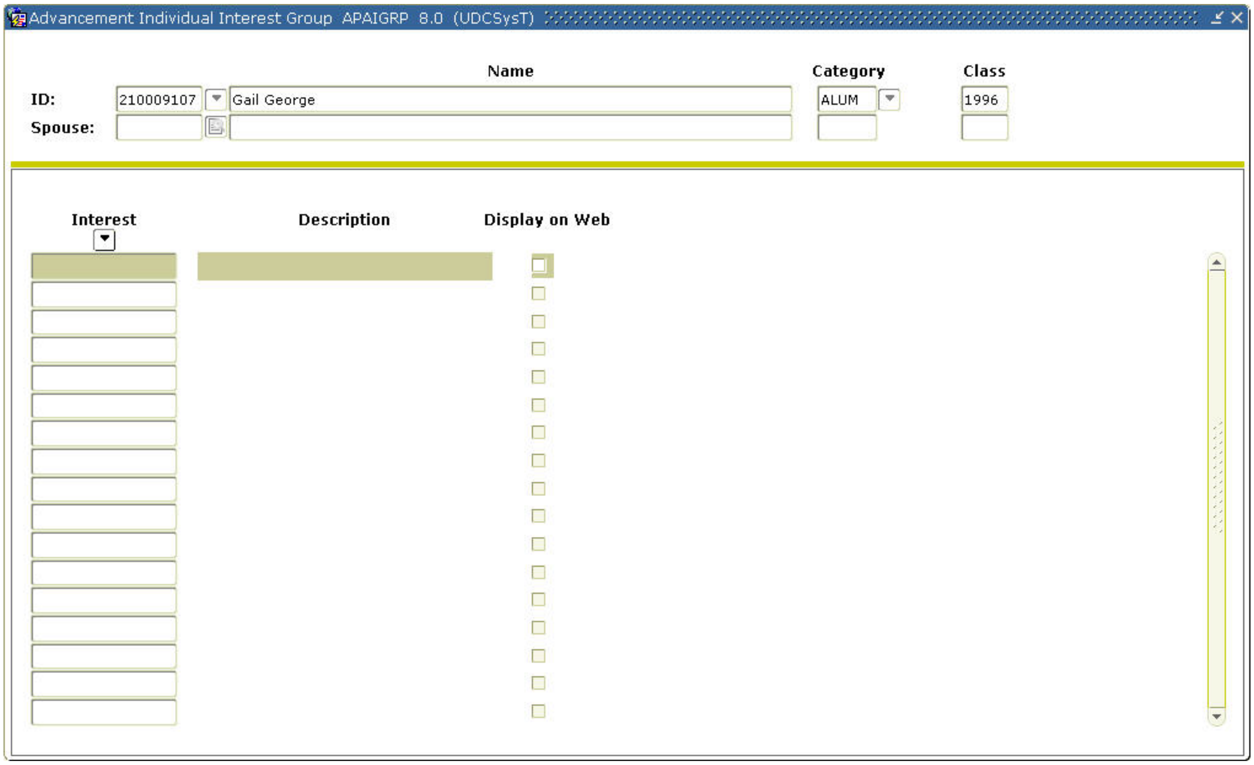
Steps

1. Select the Interests link from the Communications menu.
2. Select the View Your Interest Profile link.
3. Interests you have selected appear in the Interest Groups chart.
4. Review your interest profile that displays on the Web.
5. Select the Add to your profile link beneath the chart.

   [Add to your profile | Remove from your profile]

6. Select the **Select an Interest Group to add** arrow.
7. Select an interest from the list.
8. Select the **Add to Profile** button.
9. Select the View Your Interest Profile link.
10. Verify that the system has added this new interest to your profile on the Web.

11. In Banner, access the Constituent Interest Group Form (APAIGRP).



12. Enter the ID number in the **ID** field, or perform the search function to access the appropriate record.

13. Ensure that the record has been updated to include the new interest.

14. Click the **Exit** icon.

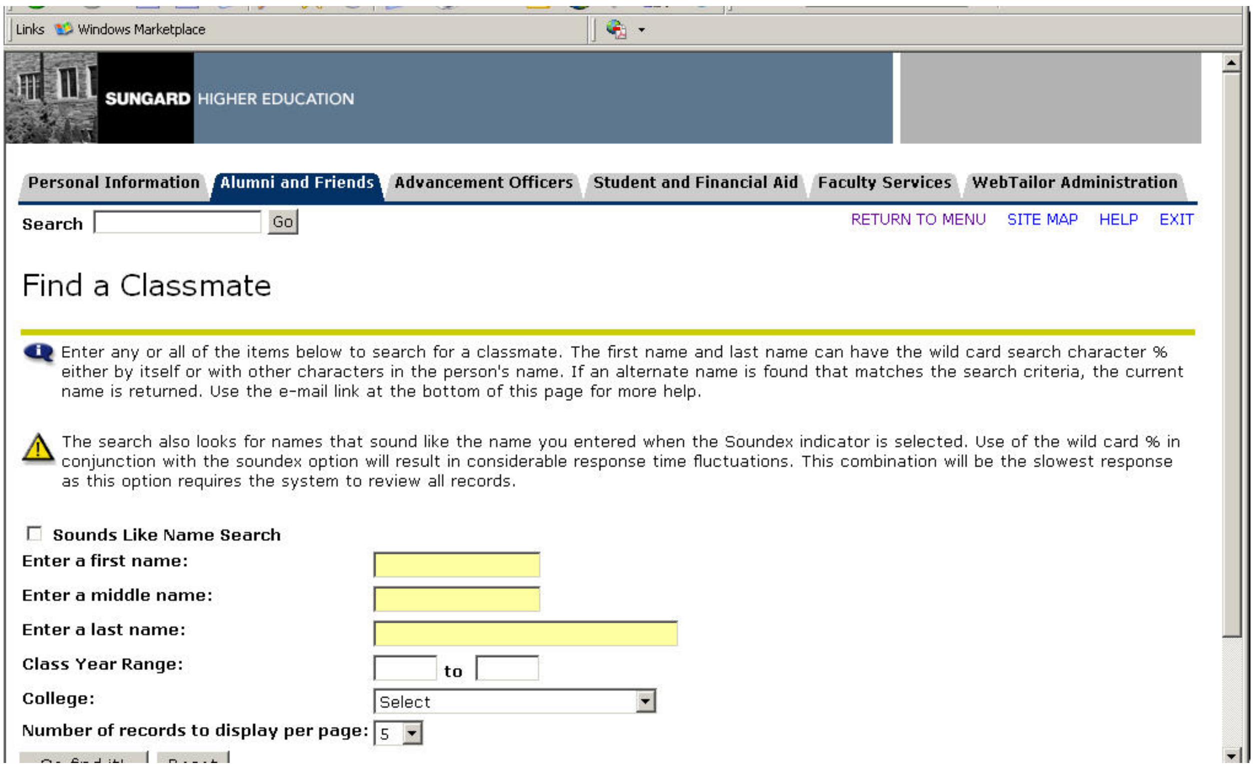
Communications – Find a Classmate

To search for information on a classmate, a constituent must select the Find a Classmate option from the Communication menu. The information that appears on this page has been set up by the institution or is data that the classmate approved for display on the Web.

Because the information found in this section is of a personal nature, it requires some policy decisions to be made by the Advancement staff. The Directory Options Rule Form can control what information displays on the Web for constituents. Additionally, constituents may be allowed to update their own profile via Alumni and Friends Self-Service. If a constituent does update their own profile, the update is stored in Banner and affects the information that displays via Alumni and Friends Self-Service.

There are instructions for finding a classmate on the Find a Classmate page. After a successful search, Search Results display.

View



Steps

1. From the Communications Menu select Find A Classmate.

2. Enter the name of the person you are looking for in the **First Name, Last Name, and Middle Initial** fields. You have the option of using wild card characters (%) if you are not sure of exact names.

3. In the **Select number of records to display at one time** field, select a number from the drop-down menu

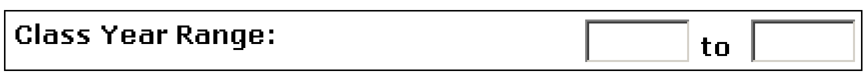
4. Select the **Go find it!** Button.

5. View the data on the Search Results page.

6. Return to the Find a Classmate page via the New Search Link found at the bottom of the web page.

[New search | Advancement Office E-mail Link]

7. In the **Class year Range** field, enter the years that you which to search.

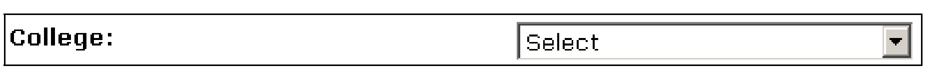


8. Select the **Go find it!** button.

9. View the data on the Search Results page via the New Search Link found at the bottom of the web page.

10. Return to the Find a Classmate page.

11. In the **College** field, select a college from the drop-down menu



12. Select the **Go find it!** button.

13. View the data on the Search Results page.

    Note: The information returned is limited to that person's Alumni profile.

    Note: Each constituent may change their profile to include or exclude items that are displayed in Find A Classmate. The default profile is maintained on GOADIRO; however, one of the options available to the constituent is to change the default profile using *Show Directory Profile*. If you have marked a person's record as Confidential in Banner, then information will not display for that person.

Communications – Class Notes

The Class Notes Web page contains the following list of options that provide connections to the Alumni office and allow you to enter information about you and your family. The person can indicate whether or not the information provided can be published by the institution.

- Let me tell you about my children
- Let me tell you about my job
- Let me tell you about a new degree

These first three options simply provide an e-mail link to the institution's Alumni Office.

"Let me tell you general information" provides a comment box in which to enter information as well as an 'OK to Publish' checkbox, and a 'Send Info' button

This information updates the Constituent Comment Form APACOMT. A user and a subject for these comments must be established via the Alumni and Friends Self-Service Rules page of WebTailor

"Let me tell you where I live" provides a link to update an existing address or insert a new address by selecting an address type from the drop-down menu and clicking on the insert button. A link is also available to connect you to the United States Postal Service for a change of address information and forms.

"Let me update you on my marital status" updates the Banner marital status field found on APAIDEN

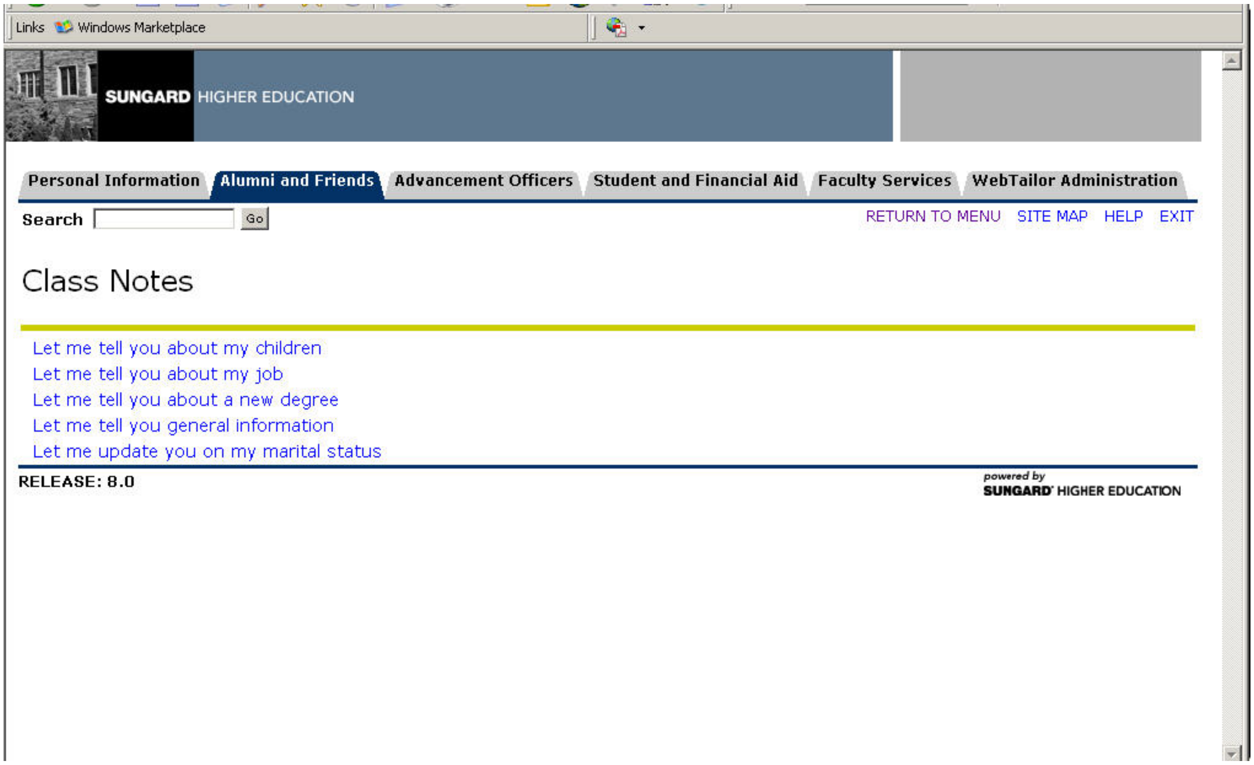
Notes:

- The institution can monitor address change activity using the Address Review and Verification Form (GOAADDR).
- Currently there are no Banner updates for child, employment and degree information. You must develop a procedure for transferring this information from e-mail into Banner.

Steps

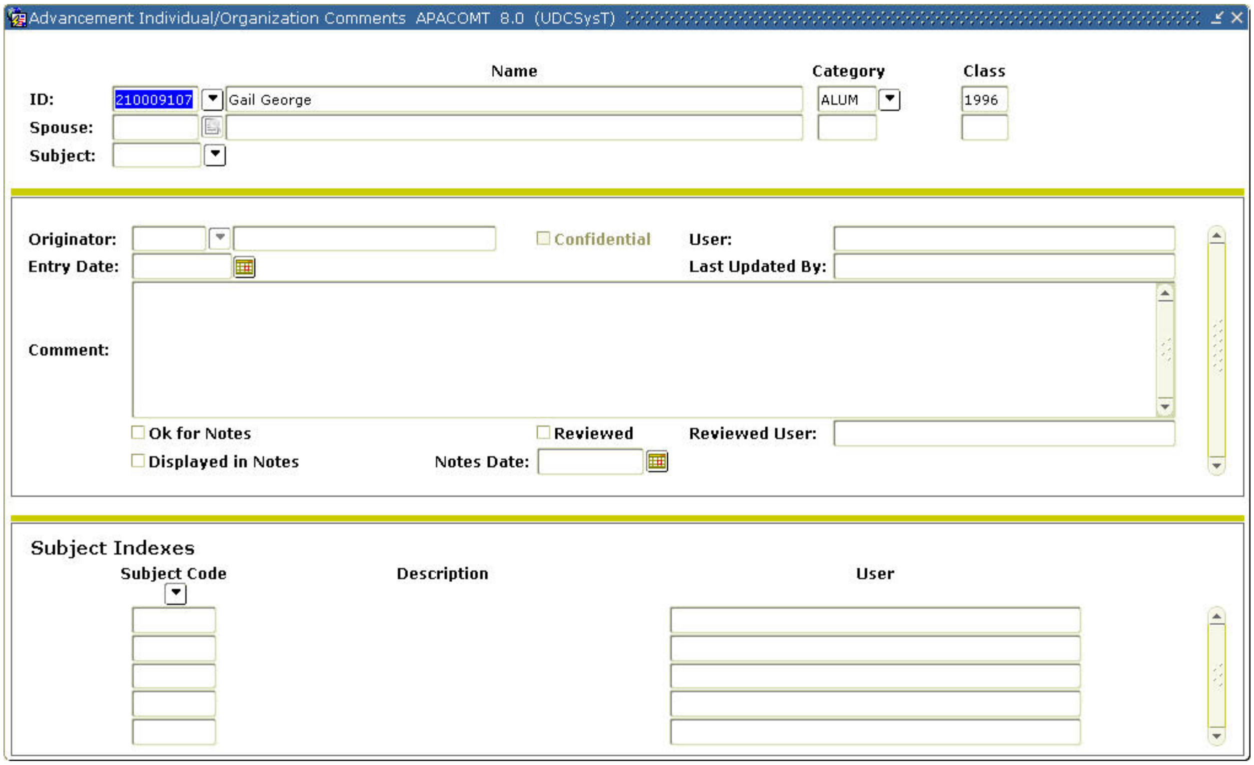
Follow these steps to submit some general information via Alumni and Friends Self-Service. Verify that the appropriate Banner forms have been updated.

1. Login to the Alumni and Friends Self-Service.
2. Select the Communications menu.
3. Select the Class Notes option.
4. Select the *Let me tell you general information* option.



5. Enter a comment in the **Comment** box.
6. Select the **OK to Publish** button.
7. Select the **Send Info** button.

8. Access the Constituent/Organization Comment Form (APACOMT).



9. The **Comment** box would be populated with the message you just entered in the **Comment** box on the Web.

10. Perform a **Next Block** function.

11. Notice the Subject Index has been entered. This value is defaulted based on the code established in the Advancement DataTailor rules.

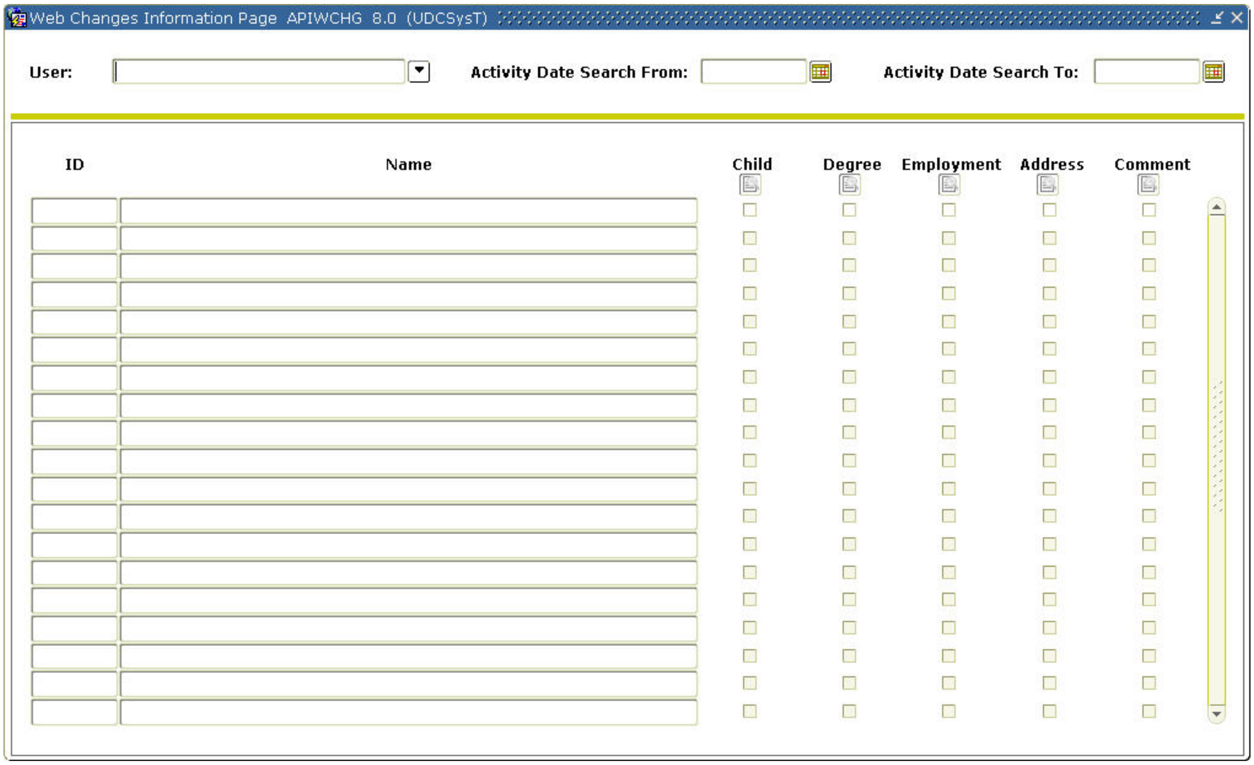
12. Click the **Exit** icon.

Web Changes Information Form (APIWCHG)

The Web Changes Information Form (APIWCHG) indicates whether the following information was updated via the Web.

- Employment (future use)
- Child (future use)
- Degree (future use)
- Address Comments

View



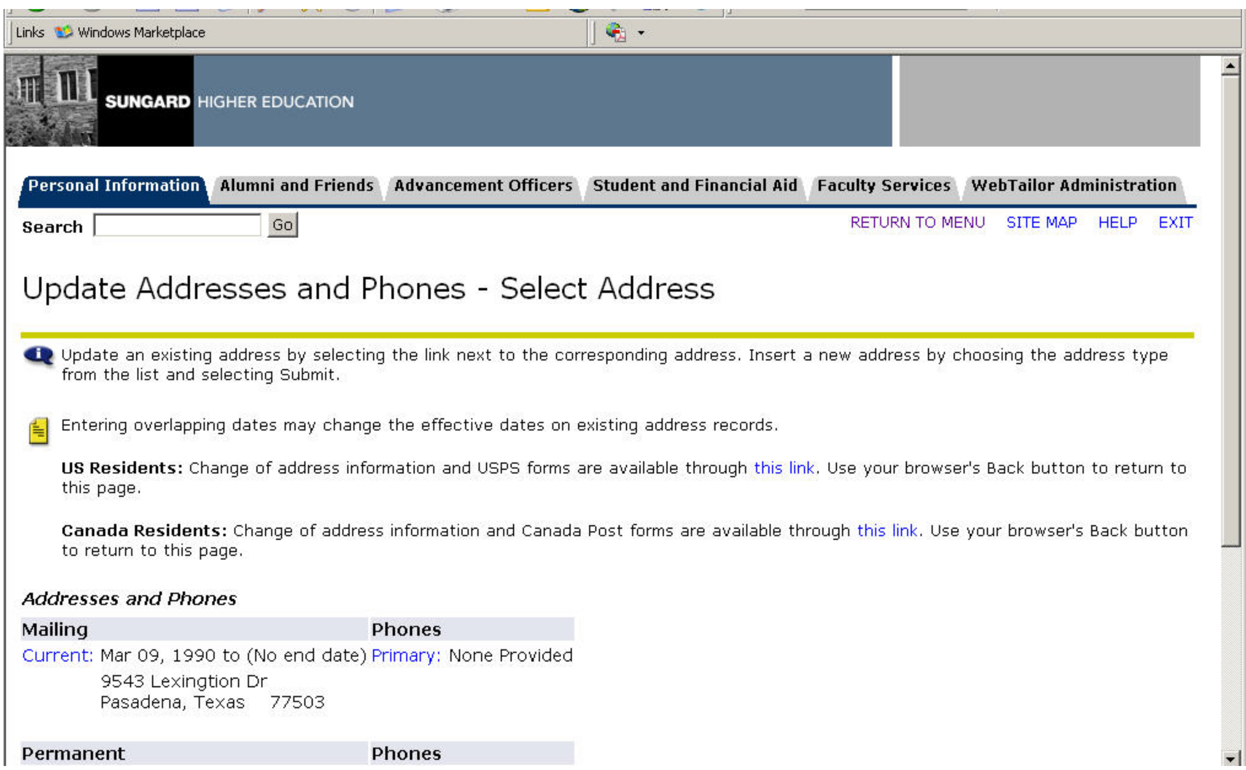
Communications – Update Addresses and Phones

Update Address Information

Update address information via the Web and verify the update in Banner.

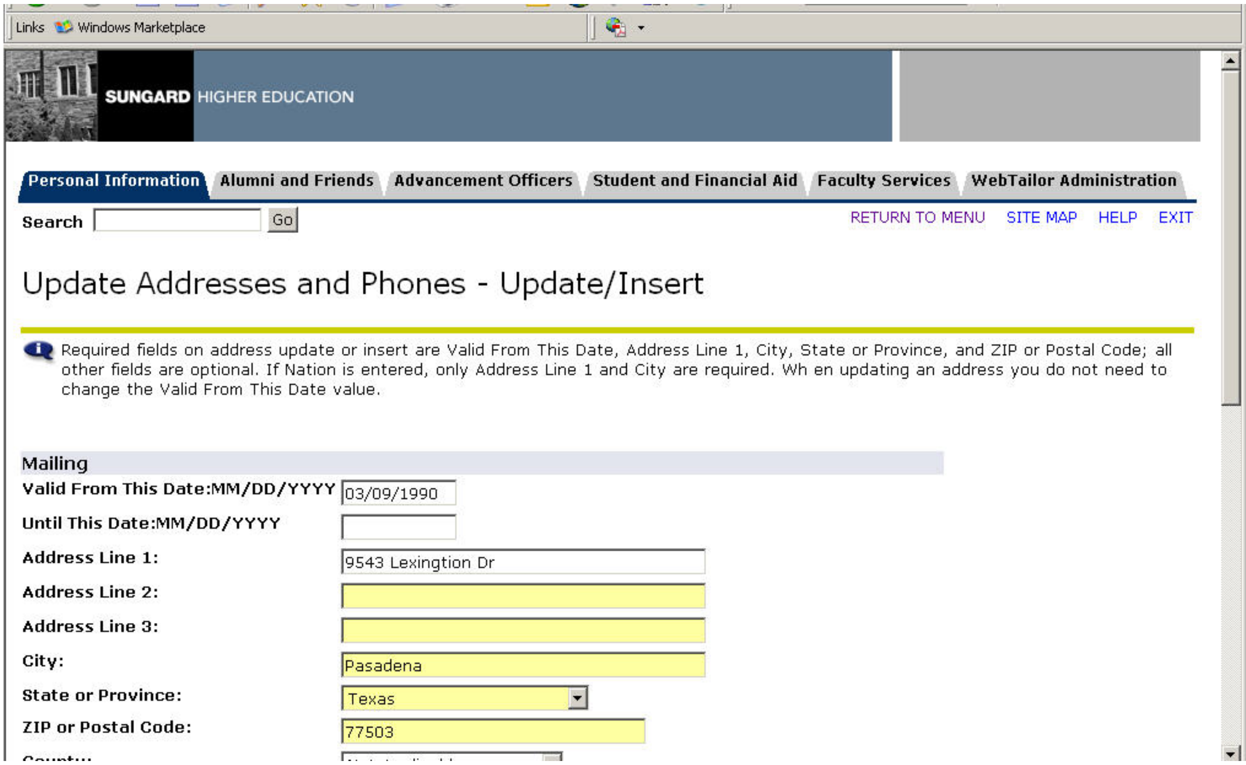
1. Login to the Alumni and Friends Self-Service.
2. Select the Communications menu.
3. Select the Update Addresses and Phones option.

   Note: The system takes you to the Update Address(es) and Phone(s) page. It is the same page as seen on the Main Menu page.



4. To change your mailing address, click on the link 'Current' next to the address you want to change.

5. The Update/Insert Address page is displayed.



6. Enter the last date this address is in effect in the **Until This Date** field.

7. Select the **Delete this Address** option.

8. Select the **Submit** option.

9. You will be returned to the **Update Address(es) and Phone(s)** page where you will see that the address you just marked to **Delete** is no longer on your list of addresses. Select the type of Address to reenter from the drop down list provided with **Type of Address to Insert**. Select the **Submit** button.

10. A blank **Update Addresses and Phone** page will be displayed indicating the type of address you selected to insert.

11. Enter the effective date in the **Valid From** field.

12. Leave the **Until** field null.

13. Enter a street address in **Address Line 1**.

14. Enter a city in the **City** field.

15. Enter a state/province in the **State/Province** field.

16. Enter a ZIP code in the **ZIP/Postal Code** field

    Note: The requirement is that if a city and state is entered, then a zip is required (US address requirements). If a city and nation value is entered, the zip is not required (International requirements).

17. Enter an **Area Code**, **Phone Number**, and **Ext**.

    Note: Any phone details can be populated and saved. In self-service, there are no minimal requirements. The available fields to enter include area code, phone number, extension, and international access codes.

18. Select the **Submit** option

19. You will be returned to the **Update Address(es) and Phone(s)** window where the address you have just inserted will now be displayed. At this point you have successfully changed your address. The update you see here will also be available in Banner. You may choose the **View Addresses and Phone** link at the bottom of this window or **Return to the Menu** link.

20. In Banner, access the Advancement Identification Form (APAIDEN).

21. Enter an ID in the ID field.

22. Perform a **Next Block** Function.

23. Click the Address tab.

24. The system displays the updated addresses for the constituent by code. Notice that the previous address has been marked inactive.

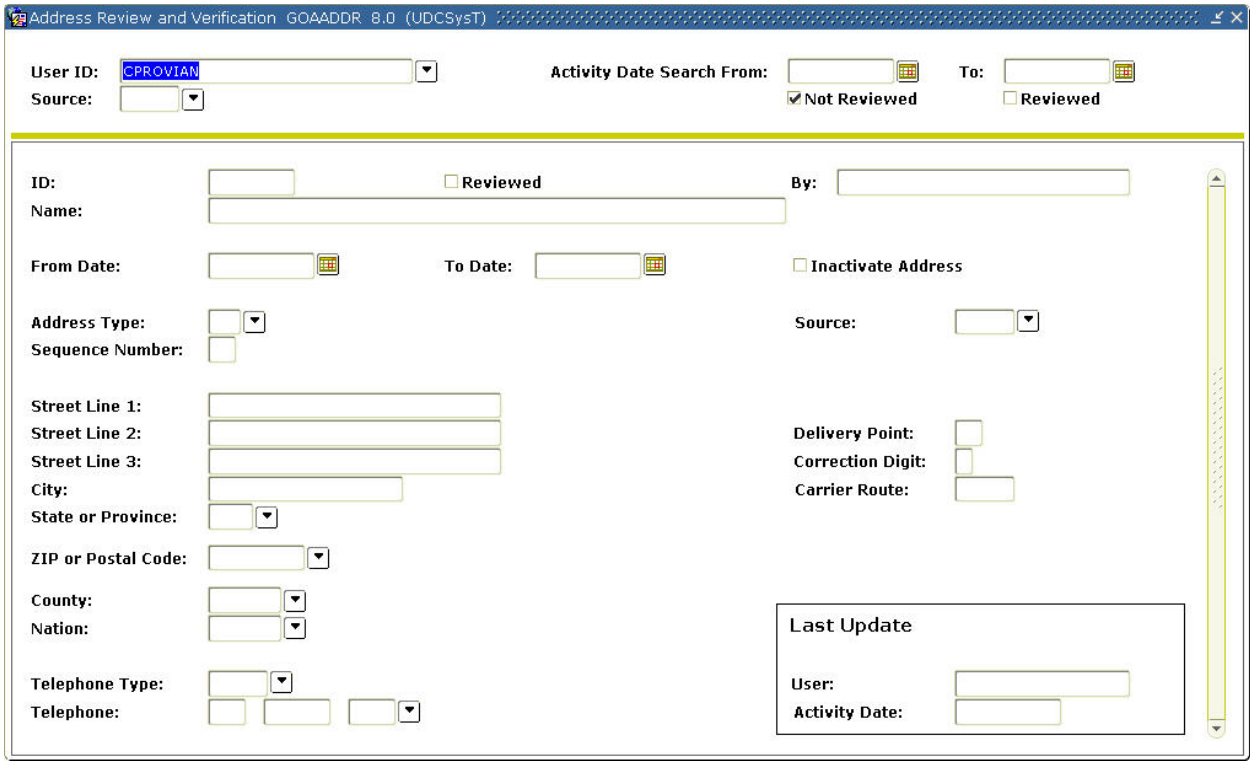
25. Click the **Save** icon.

26. Click the **Exit** icon.

Address Review and Verification Form (GOAADDR)

Address Review and Verification Form (GOAADDR) allows an institution to review and verify address information entered over the Web or via any Banner form.

View



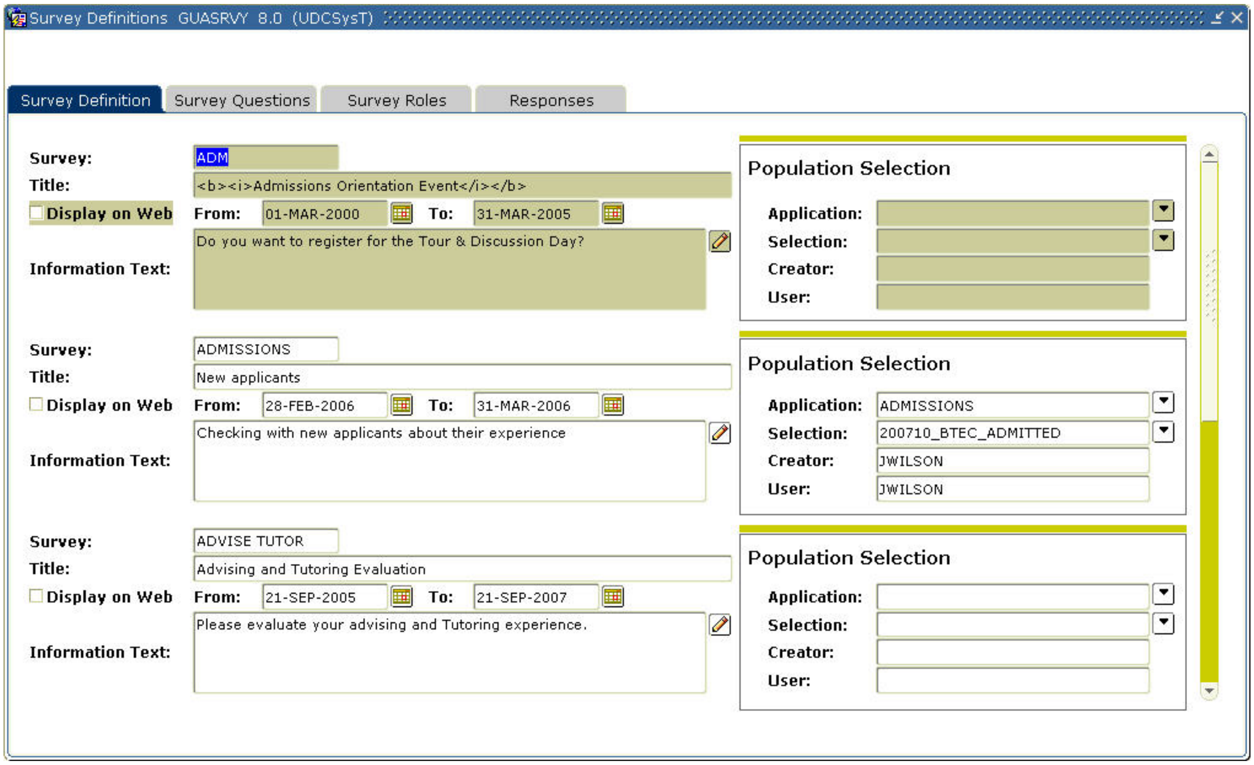
Communications - Creating a Survey

The Survey Definition Form (GUASRVY) is used to define the following information for a survey:

- Whether the survey appears on the Web
- Date range when the survey appears on the Web
- Description that appears on the Web
- Questions and valid responses in the survey
- Web products and populations that can access the survey

Use the main window to describe the survey and (optionally) to identify a population of Banner IDs that can respond to the survey.

View



Steps

1. Access the Survey Definition Form (GUASRVY).

2. Enter the name of the survey in the **Survey** field. The maximum length is 15 characters.

3. Enter a description of the survey that appears if the survey is displayed on the Web In the **Title** field. You can query on this field.

4. The **Display on web** checkbox indicates whether the survey should appear on the Web.

   - *checked* Display on the Web (*Y* is stored in the database).
   - *unchecked* Do not display on the Web (*N* is stored in the database).

5. If selected, the survey can be also viewed or removed from the Web when it is being constructed or modified.

6. The **From** field shows the Beginning date when the survey is displayed on the Web. The format is DD-MON-YYYY.

7. The **To** field indicates the ending date when the survey is displayed on the Web. The format is DD-MON-YYYY.

8. The **Information Text** field is a Freeform description that can be entered and appears if the survey is displayed on the Web.

9. Enter the functional area associated with a population of Banner IDs in the **Application** field.

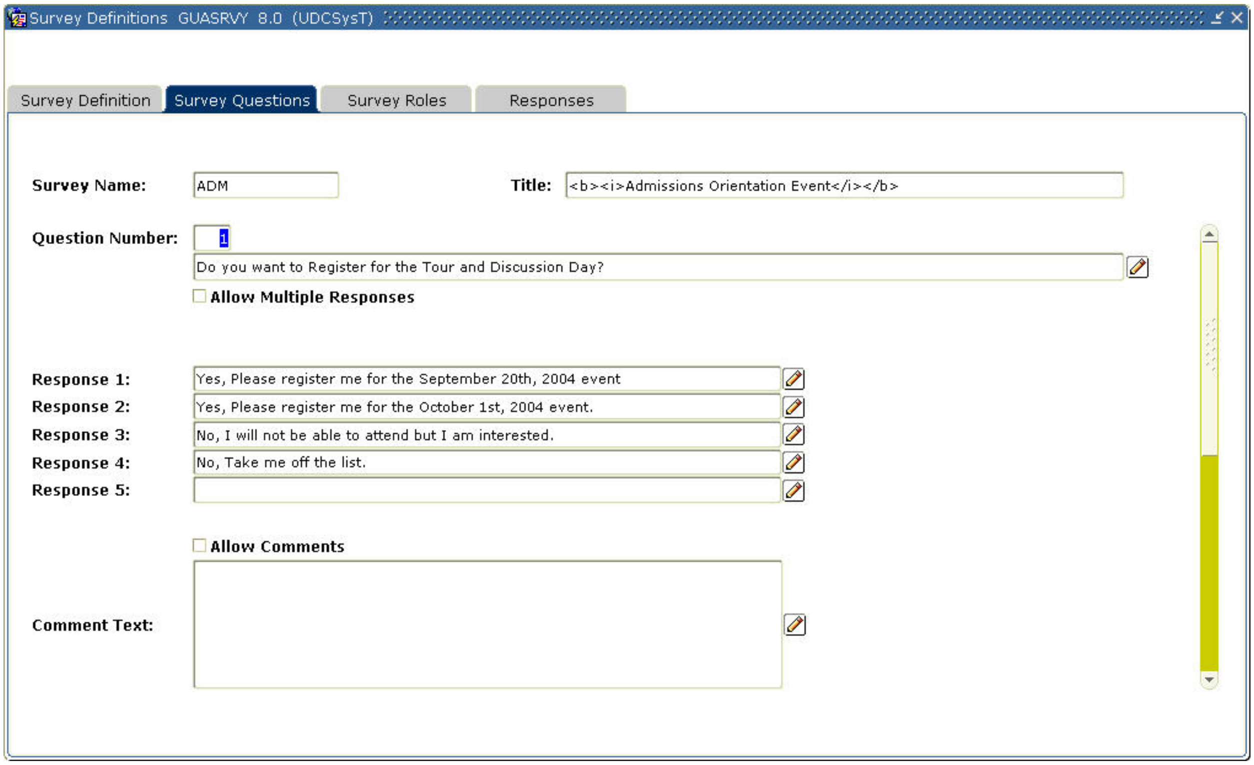
10. Enter the Code that identifies a set of rules used to select a population of Banner IDs in the **Selection** field.

11. Enter Oracle ID of the user who created the rules used to select a population of Banner IDs in the **Creator** field.

12. Enter the Oracle ID of the user who ran the Population Selection Extract Process (GLBDATA) to select the population of Banner IDs in the **User** field.

    Note: The **Application**, **Selection**, **Creator**, and **User** fields identify a population of Banner IDs that can respond to the survey. If a population is defined with these fields, only those IDs in the population can access the survey.

13. Click the **Survey Questions** tab.



14. Use this window to define the questions and valid responses in the survey.

15. In the **Survey** field, the Name of the survey is displayed.

16. In the **Title** field, the Description of the survey is displayed.

17. Enter a sequential number that identifies each question in the survey in the **Question #** field. Use the scroll bar to scroll through the questions in the survey. The maximum number of questions is 999.

18. Enter the freeform text of each question in the survey in the **Question** field.

    Note: If the question is too long to display in this field, select Edit to display the complete question in the Editor window.

19. **Allow Multiple Responses Check box** indicates whether a user can give more than one response to the question. Checked indicates multiple responses are allowed (*Y* is stored in the database). Unchecked indicates only one response is allowed (*N* is stored in the database)

20. Enter text that appears on the Web to describe each possible response to the question in the **Response** field. Note: A question can have up to five responses.

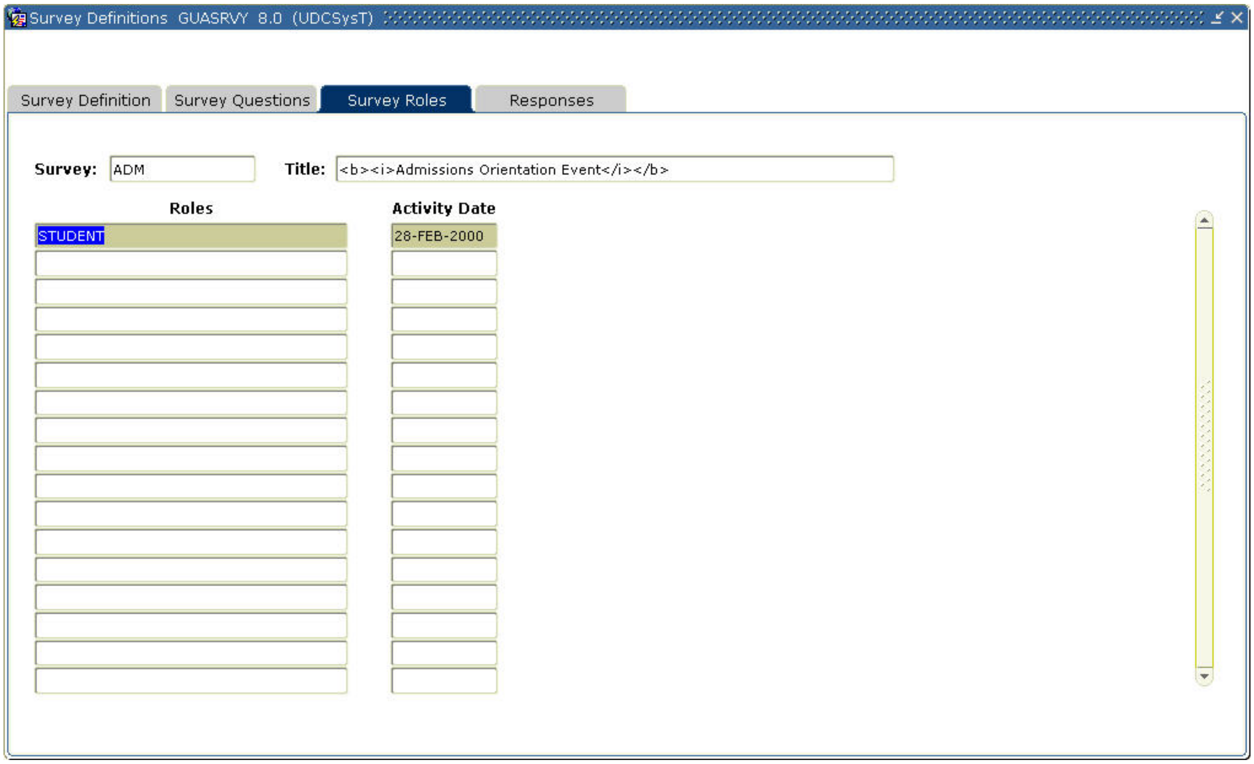
21. The **Allow Comments** checkbox indicates whether comments can be entered as a response.

checked Comments are allowed (*Y* is stored in the database).

unchecked Comments are not allowed (*N* is stored in the database).

22. Enter the text that appears on the Web before the comment box in the **Comment Text** field, if comments can be entered as a response.

23. Click the **Survey Roles** tab. Use this window to define the Web products where the survey can appear.



24. In the **Survey** field, the name of the survey is displayed.

25. In the **Title** field, a description of the survey is displayed.

26. In the **Roles** field, enter the Web product where the survey can appear. Valid values are *ALUMNI*, *EMPLOYEE*, *FACULTY*, and *STUDENT*.

27. The **Activity Date** indicates the date when the role was entered or last changed. Display-only.

28. Return to Self-Service and respond to this survey.

Communications – Respond to a Survey

Clicking on the Respond to a Survey option on the Communications menu takes you to the Current Surveys page. Here you are given the option to respond or not to the survey(s) listed.

Click on the survey title(s) in hypertext if you choose to participate in the survey(s). Info text on the page has instructions for accessing a survey. Info text on each survey page has instructions for completing the survey.

The responses for the survey are stored in Banner tables. Population selection or web roles may identify a target audience for survey response.

If you should elect not to respond to the survey, click the "**I do not wish to respond**" button on the survey page. The "**I do not wish to respond**" button applies to the entire survey, not to the individual question. Clicking this button deletes the survey selection from the constituent's list of surveys.

To scroll from one question to the next, click the **Next Question** button.

If you want to leave the survey before it is complete, and return to complete it later, click the **Finish Later** button.

Clicking the **Survey Complete** button submits the survey results to the institution's database, and the survey selection is deleted from the constituent's list of surveys.

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

- The constituent clicks **Survey Complete**.
- The constituent clicks **I do not wish to respond**.
- The date allowing the survey to appear on the Web expires.

The institution uses Banner to define the survey and the questions associated with the survey. The following are options in defining the survey:

The type of question

- More than one response allowed (check boxes).
- Only one response allowed (radio group).
- Comments only.
- Additional comments allowed.

The order of the questions.

The valid responses.

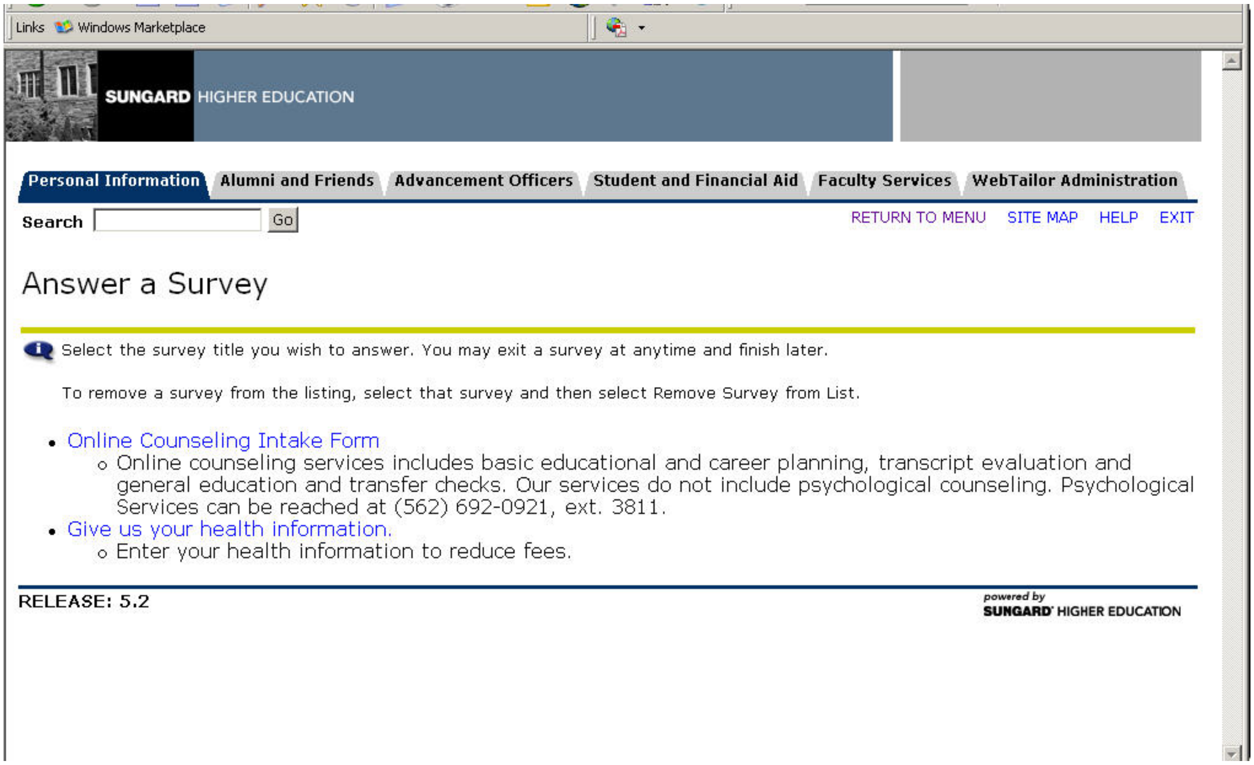
Audience

- Based on Web Role.
- Based on Population Selection.

As part of the General module information functionality, all pertinent surveys are available when the alumnus logs in.

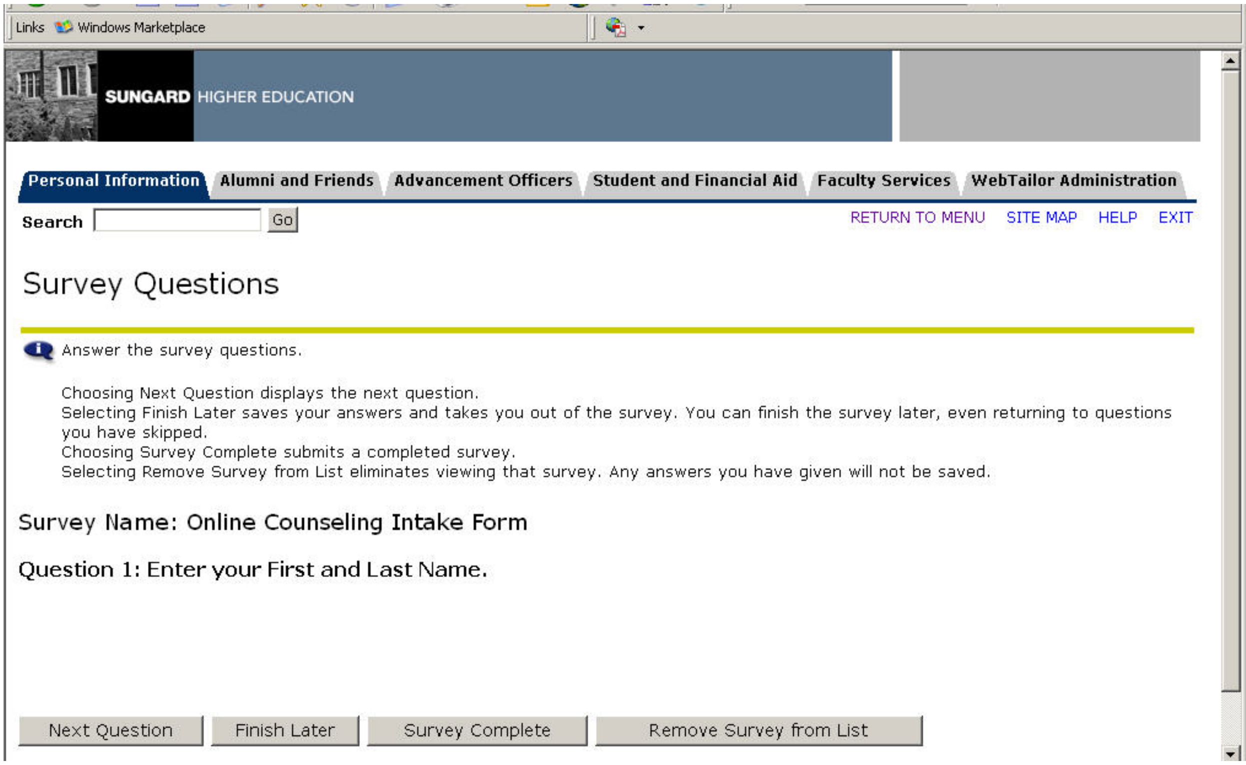
Steps

1. Open Alumni and Friends Self-Service
2. Select the Communications menu.
3. Select Respond to a Survey. Result: The Current Surveys page displays all surveys that are pending for you.



4. Select a survey title.

5. Follow the instructions for the particular survey that you selected.



6. Before finishing the survey, you may select the **Finish Later** button if you would prefer to return to it later.

7. The system displays the message *Thank you for beginning the survey, please remember to return and finish the survey*.

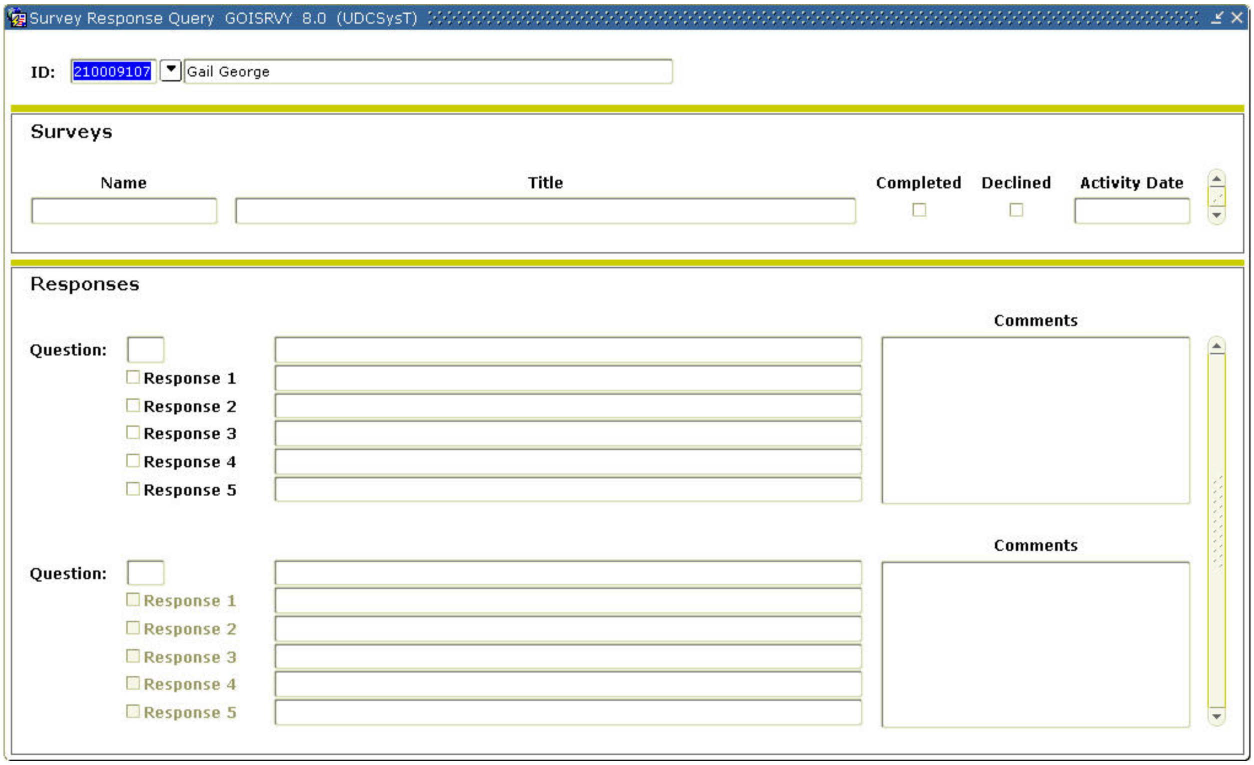
8. Return to the survey and complete it.

9. Select the **Survey Complete** button.

10. The system displays the message *Thank you for completing the survey*.

11. The survey now is gone from your survey list.

12. In Banner, access the Survey Response Query Form (GOISRVY).

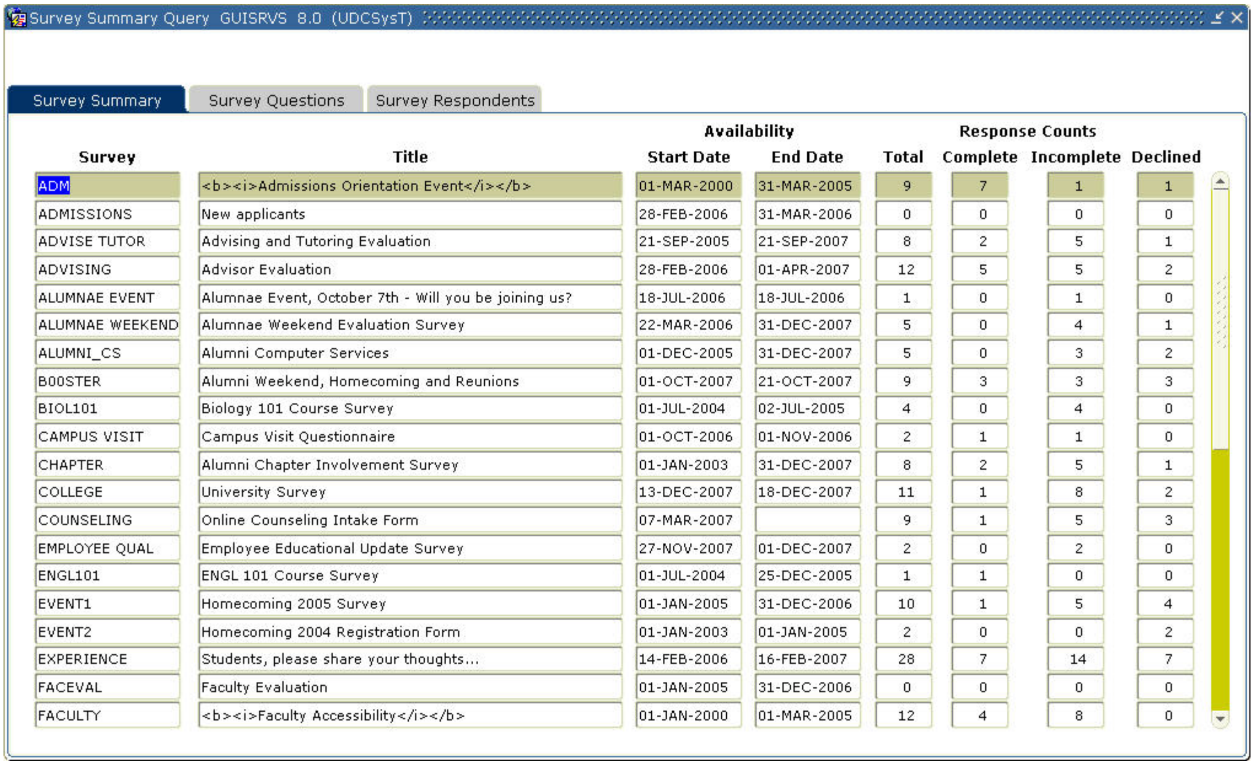


13. The ID of the Web user who responded to the surveys will default in the **ID** field.

14. Perform a Next Block function until you reach the Responses block to view the results of this survey, by question.

15. Click the **Exit** icon.

16. Access the Survey Summary Query Form (GUISRVS).



Survey Summary Query GUISRVS 8.0 (UDCSysT)

Survey Summary | Survey Questions | Survey Respondents

Survey	Title	Availability Start Date	Availability End Date	Total	Response Counts Complete	Response Counts Incomplete	Response Counts Declined
ADM	<i>Admissions Orientation Event</i>	01-MAR-2000	31-MAR-2005	9	7	1	1
ADMISSIONS	New applicants	28-FEB-2006	31-MAR-2006	0	0	0	0
ADVISE TUTOR	Advising and Tutoring Evaluation	21-SEP-2005	21-SEP-2007	8	2	5	1
ADVISING	Advisor Evaluation	28-FEB-2006	01-APR-2007	12	5	5	2
ALUMNAE EVENT	Alumnae Event, October 7th - Will you be joining us?	18-JUL-2006	18-JUL-2006	1	0	1	0
ALUMNAE WEEKEND	Alumnae Weekend Evaluation Survey	22-MAR-2006	31-DEC-2007	5	0	4	1
ALUMNI_CS	Alumni Computer Services	01-DEC-2005	31-DEC-2007	5	0	3	2
BOOSTER	Alumni Weekend, Homecoming and Reunions	01-OCT-2007	21-OCT-2007	9	3	3	3
BIOL101	Biology 101 Course Survey	01-JUL-2004	02-JUL-2005	4	0	4	0
CAMPUS VISIT	Campus Visit Questionnaire	01-OCT-2006	01-NOV-2006	2	1	1	0
CHAPTER	Alumni Chapter Involvement Survey	01-JAN-2003	31-DEC-2007	8	2	5	1
COLLEGE	University Survey	13-DEC-2007	18-DEC-2007	11	1	8	2
COUNSELING	Online Counseling Intake Form	07-MAR-2007		9	1	5	3
EMPLOYEE QUAL	Employee Educational Update Survey	27-NOV-2007	01-DEC-2007	2	0	2	0
ENGL101	ENGL 101 Course Survey	01-JUL-2004	25-DEC-2005	1	1	0	0
EVENT1	Homecoming 2005 Survey	01-JAN-2005	31-DEC-2006	10	1	5	4
EVENT2	Homecoming 2004 Registration Form	01-JAN-2003	01-JAN-2005	2	0	0	2
EXPERIENCE	Students, please share your thoughts...	14-FEB-2006	16-FEB-2007	28	7	14	7
FACEVAL	Faculty Evaluation	01-JAN-2005	31-DEC-2006	0	0	0	0
FACULTY	<i>Faculty Accessibility</i>	01-JAN-2000	01-MAR-2005	12	4	8	0

17. View the comprehensive survey results.

18. Click the **Exit** icon.

Communications – Mailing Lists

The Mailing List option of the Communication menu provides the functionality for constituents to review which mailings they are receiving, to add new mailings to their record or to remove mailings from their record. This information is pulled from and stored in the Banner form APAMAIL.

From the Mailing Lists page, the system offers two choices

- view mailing lists
- update mailing lists

When you select *View Mailing Lists*, a screen appears with a chart listing the current list of publications you subscribe to, along with the address type and effective date for each. Beneath the chart, there are three links to allow you to amend your list. They are the same functions that you find if you select the Update Mailing List option on the menu. These links are

- add a mailing to your list
- remove a mailing from your list
- change a mailing address or effective date.

If you want to add a new mailing to your list, select the Add a mailing to your list option and the Add a Mailing screen displays. The system stores all the mailing lists available. The constituent can also select a different address type for each mailing. When the mailing list is updated, the system navigates back to the Alumni Mailing Lists Menu page.

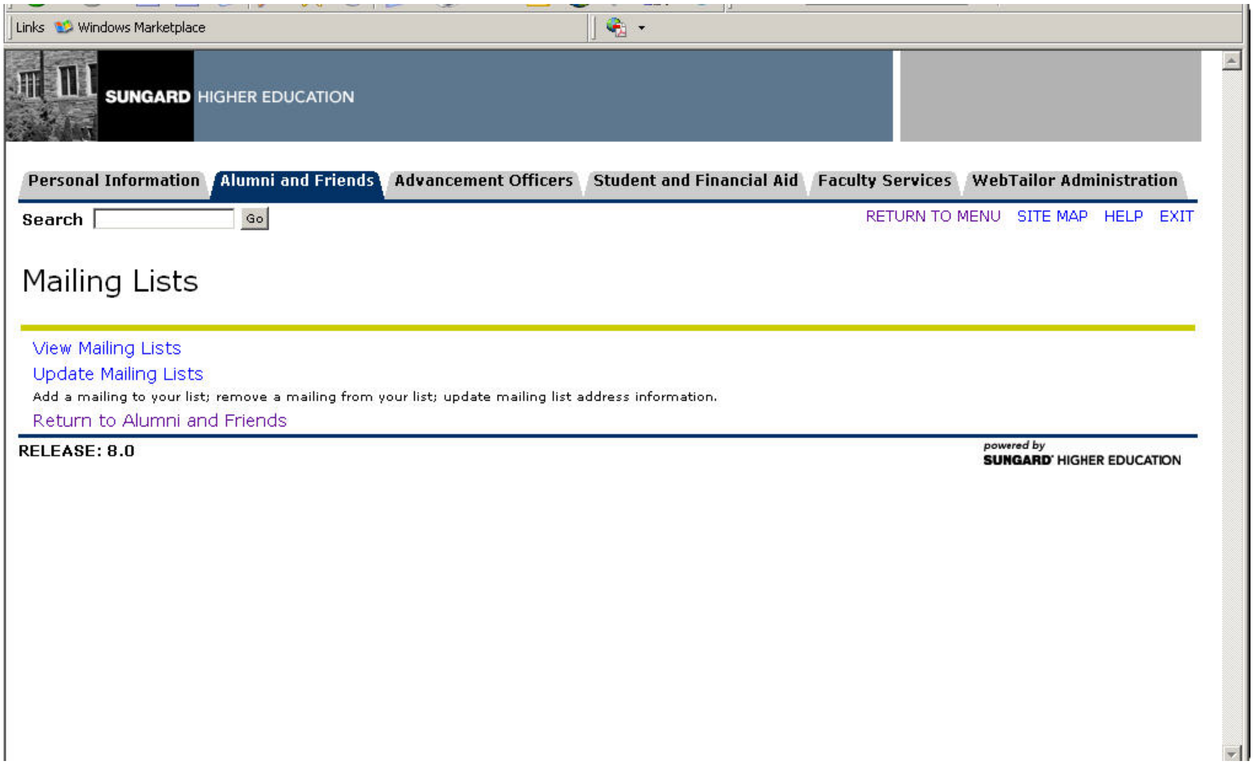
To remove a mailing from your list, select the one you want removed. When you click the **Remove from Mailing List** button the item is removed, the system navigates back to the Alumni Mailing Lists Menu page, and the message *Your mailing list has been successfully changed* displays.

If you want to redirect mail to a different address (by address type) or to change the date on which the mailing list is effective, you first select the Select a Mailing option. It contains a drop-down menu of the mailing lists on which you are currently included. Make your selection, and then click the **Change address or effective date** button. The system then navigates to the Change a Mailing page. The first field, **Change the mailing entry**, is populated by the choice you made from the list on the previous screen. Now select the mailing address from the drop-down menu of addresses on the **Select a new address for mailing** field. Click **Update**. The mailing list is updated and the system navigates back to the Alumni Mailing Lists menu page.

Steps

19. Within Alumni and Friends Self-Service, select Communications.

20. Select Mailing Lists.



21. Select *View Mailing Lists*.

22. Review your mailing list that appears on the chart.

23. Select the Add a mailing to your list link.

24. Click the arrow on the**Mailing to add** field.

25. Choose a new mailing from the list to add to your record.

26. Click the arrow on the **Address for the mailing** field.

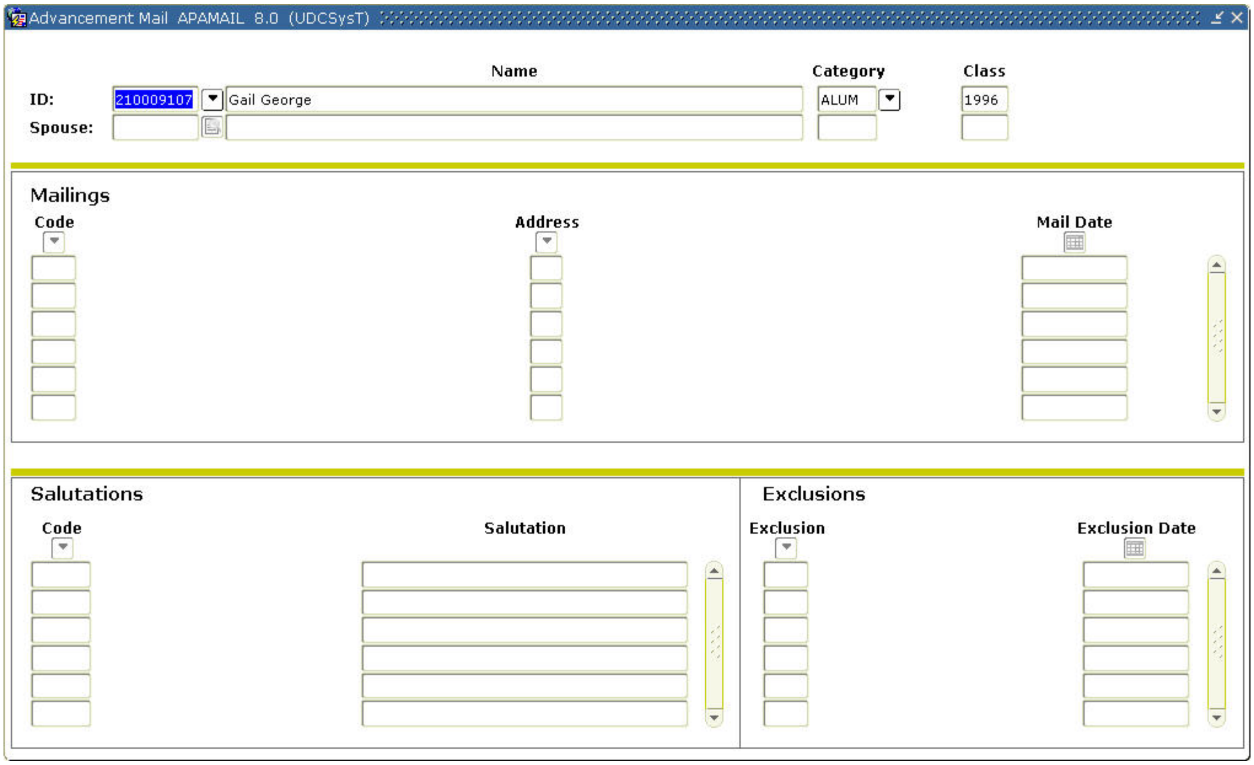
27. Choose an address type from the list for the new mailing.

28. Enter a date in the **Date for the mailing to begin** field.

29. Select the **Add to Mailing List** button.

30. The message *Your mailing list has been successfully changed* displays on the Mailing Lists menu screen.

31. In Banner, access the Advancement Mail Form (APAMAIL).



32. Enter the same ID you used on the Web in the **ID** field.

33. Perform a **Next Block** function.

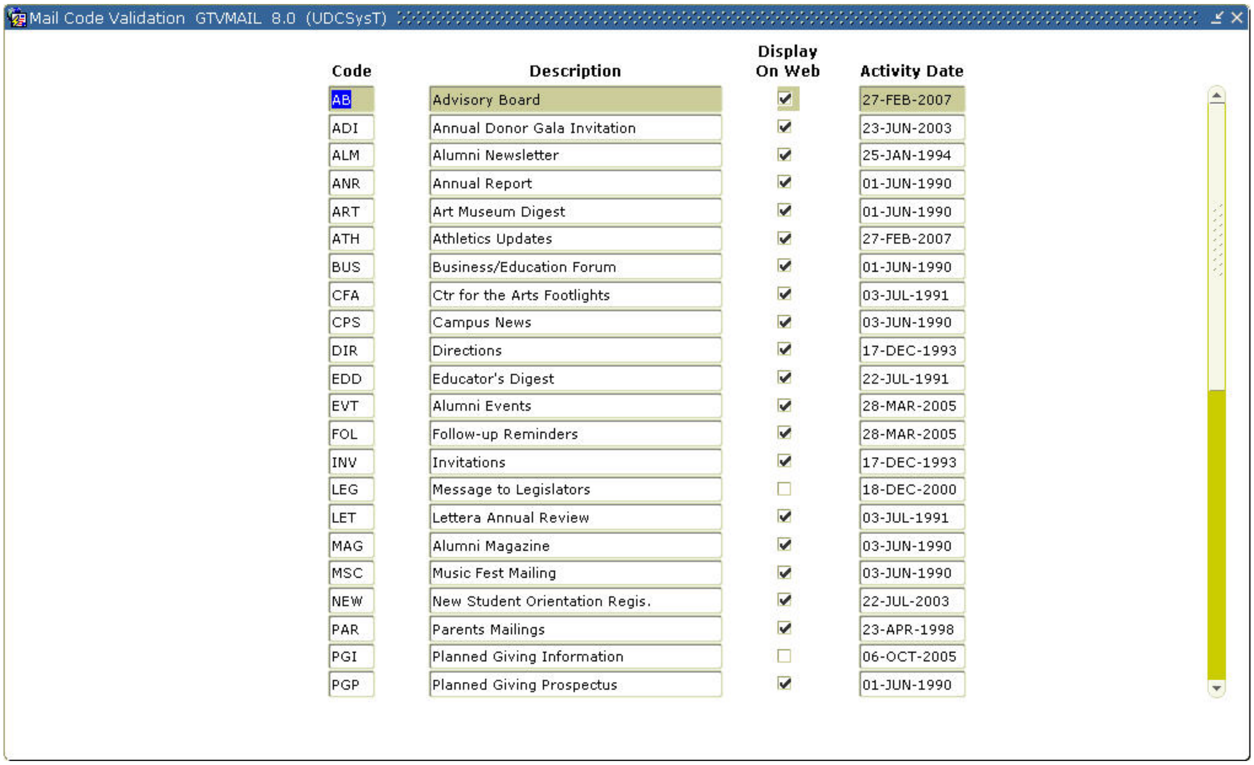
34. The new mailing you added on the Web appears in the **Mail, Address, and Date** fields.

35. Click the **Exit** function.

Mail Code Validation Form (GTVMAIL)

The Mail Code Validation Form (GTVMAIL) is used to create a new mailing code in Banner to display on the Internet.

View


Mail Code Validation GTVMAIL 8.0 (UDCSysT)

Code	Description	Display On Web	Activity Date
AB	Advisory Board	☑	27-FEB-2007
ADI	Annual Donor Gala Invitation	☑	23-JUN-2003
ALM	Alumni Newsletter	☑	25-JAN-1994
ANR	Annual Report	☑	01-JUN-1990
ART	Art Museum Digest	☑	01-JUN-1990
ATH	Athletics Updates	☑	27-FEB-2007
BUS	Business/Education Forum	☑	01-JUN-1990
CFA	Ctr for the Arts Footlights	☑	03-JUL-1991
CPS	Campus News	☑	03-JUN-1990
DIR	Directions	☑	17-DEC-1993
EDD	Educator's Digest	☑	22-JUL-1991
EVT	Alumni Events	☑	28-MAR-2005
FOL	Follow-up Reminders	☑	28-MAR-2005
INV	Invitations	☑	17-DEC-1993
LEG	Message to Legislators	☐	18-DEC-2000
LET	Lettera Annual Review	☑	03-JUL-1991
MAG	Alumni Magazine	☑	03-JUN-1990
MSC	Music Fest Mailing	☑	03-JUN-1990
NEW	New Student Orientation Regis.	☑	22-JUL-2003
PAR	Parents Mailings	☑	23-APR-1998
PGI	Planned Giving Information	☐	06-OCT-2005
PGP	Planned Giving Prospectus	☑	01-JUN-1990

Steps

1. In Banner, access the Mail Code Validation Form (GTVMAIL).
2. Perform an **Insert Record** function.
3. Enter a code in the **Code** field. *Example*: SCH
4. Enter a free form text description in the **Description** field.

   Example: Aumni Schedule of Events
5. Select the **Web Ind** checkbox.
6. Click the **Save** icon.

7. Click the **Exit** icon.

8. Return to the Alumni and Friends Self-Service Mailing Lists page.

9. Select Update Mailing Lists.

10. Select the Add a mailing to your list option.

11. Click the down arrow on the **Select a mailing to add** field.

12. Review the list for the mailing code you just entered in GTVMAIL.

13. When you locate the code you added on the list, select it.

14. In the drop-down menu at the **Select an address for the mailing** field, select an address type.

15. In the drop-down menu at the **Enter the date for the mailing to begin field**, enter an effective date.

16. Select the **Add to Mailing List** button.

17. The Mailing List page displays with the message *Your mailing list has been successfully changed*.

18. In Banner, access the Advancement Mail Form (APAMAIL).

19. Enter the same ID you used on the Web in the **ID** field.

20. Perform a **Next Block** function

21. The new mailing you added on the Web appears in the **Mail, Address, and Date** fields.

22. Click the **Exit** icon.

Career Opportunities - Job Opportunities

The Career Opportunities menu allows the constituent access to the following features relating to

- job opportunities
- search for employment opportunities
- review opportunities you posted
- post employment opportunities

Before implementing the Career Opportunities function of Alumni and Friends Self-Service, the institution must ensure that the Advancement Self-Service Rules page is properly set up. Use the **Require Job Posting Review** checkbox to indicate whether to show job postings on the Web without being reviewed by the institution first on the Job Posting Form (AOAJPST).

Employment opportunity activity

The Web provides constituents with career information from employers who offer job opportunities. This includes matching gift companies or any organization on the system.

When looking up information, constituents can search by

- SIC
- city and state of the company
- job category of the position

Constituents, who are employees of an Organization, as identified on their Employment History (APAEHIS), can view or update the following information about the job opportunity offered by their 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 categories (for example, executive, professional, part-time)
- job requirements (free-format text) Note: Up to 32,000 characters can be entered in this field to describe job duties, responsibilities, and requirements.

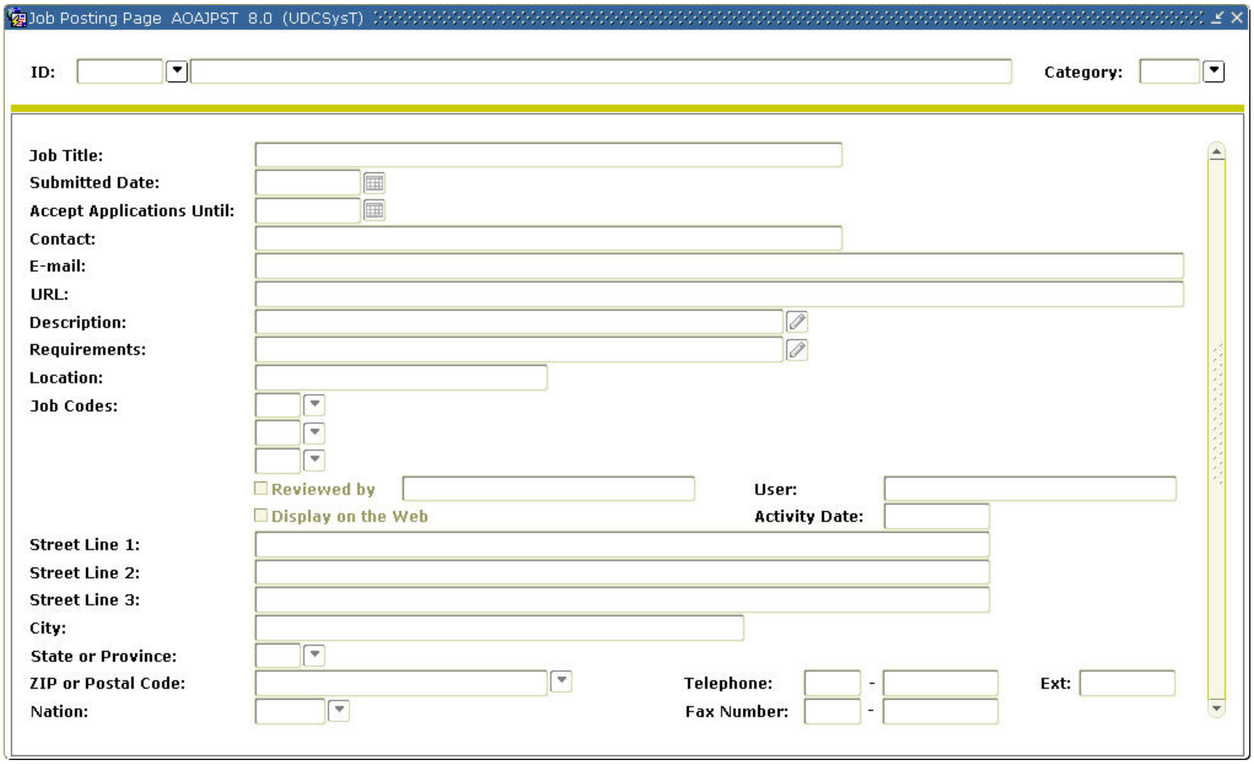
Job opportunities for companies are stored in the Job Posting Repeating Table (AORJPST). The information includes

- an address for the Contact
- 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)

Constituents can search for job opportunities via a search engine, or view all listings that have not passed the **Accepting Applications Until** date. Constituents 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 Advancement Self-Service Rules page allows the institution to select whether it will require job posting review (audit) or not.

View



Steps

Follow these steps to enter an employment opportunity in Banner and verify that it has been posted to the Web.

Note: Adding a posting via the web provides the same functionality.

1. In Banner, access the Job Postings Form (AOAJPST).
2. Enter the ID number of the company that has a job opening in the ID field.
3. Perform a **Next Block** function.
4. Enter the required data for this job opportunity, including application dates, job title, contact person, job description, etc.
5. Click the **Reviewed By** checkbox.
6. Click the **Save** icon.
7. Click the **Exit** icon.
8. Return to Alumni and Friends Self-Service.

9. Select Career Opportunities.

10. Choose the menu item *Search for Employment Opportunities.*

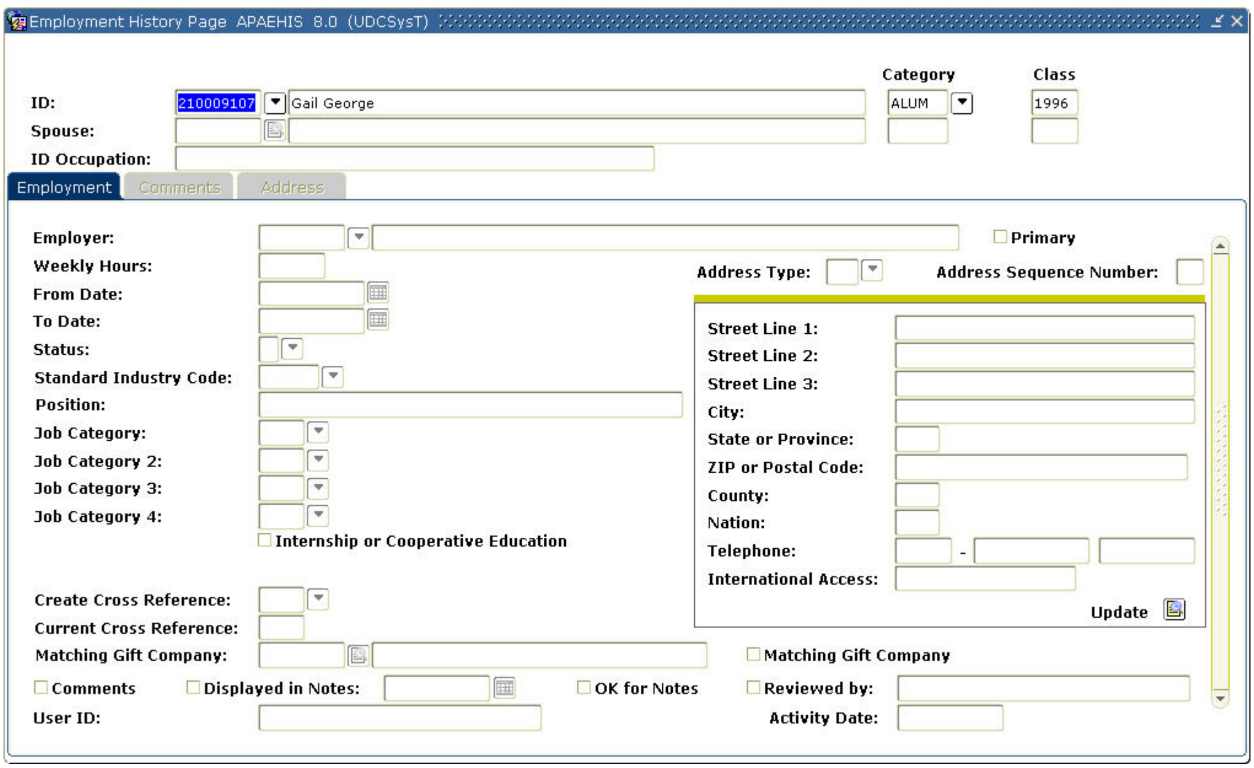
11. Enter search criteria that include your company name.

12. Verify that the opportunity you entered in Banner is posted on the Web.

Employment History Form (APAEHIS)

Use the Employment History Form (APAEHIS) to post an employment opportunity on the Web and verify that it is available for searching on the Web and that Banner has been updated.

View



Steps

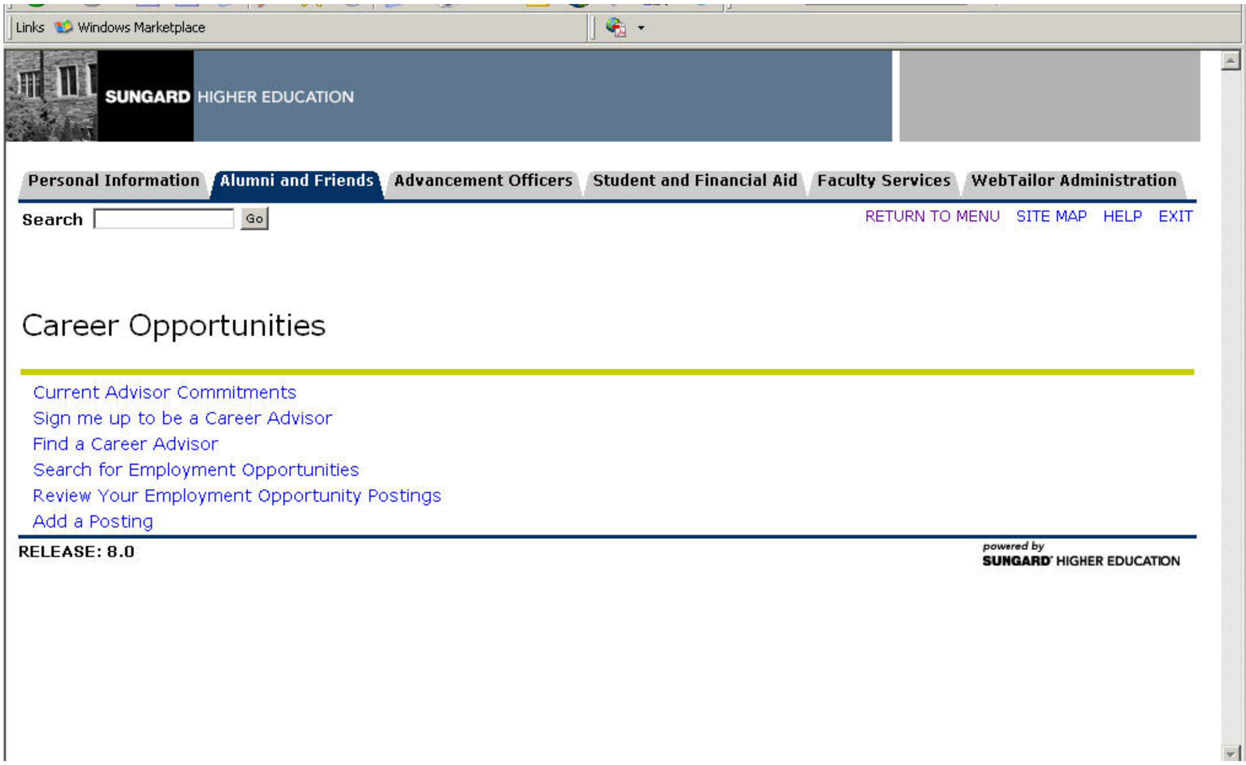
1. In Banner, access the Employment History Form (APAEHIS).
2. Enter your User ID In the **ID** field.
3. Perform a **Next Block** function.
4. Verify that you are employed at a valid organization.
5. Select the Cross Reference option from the **Options** menu.
6. Verify that you have a cross-reference.
7. Return to Alumni and Friends Self-Service/Alumni Services/Career Opportunities and choose the Post Employment Opportunities menu item.
8. Notice that your employer name appears in the drop down box.
9. Enter the information for the job opening.
10. Click the **Save** icon.
11. Click the **Exit** icon.
12. In Banner, access the Organization Job Posting Form (AOAJPST).
13. Verify that the opportunity that you entered via the Web appears on this page.
14. Note that the **Reviewed** indicator is not checked.
15. Select the **Reviewed** checkbox.
16. Click the **Save** icon.
17. Click the **Exit** icon.

Employment opportunities search

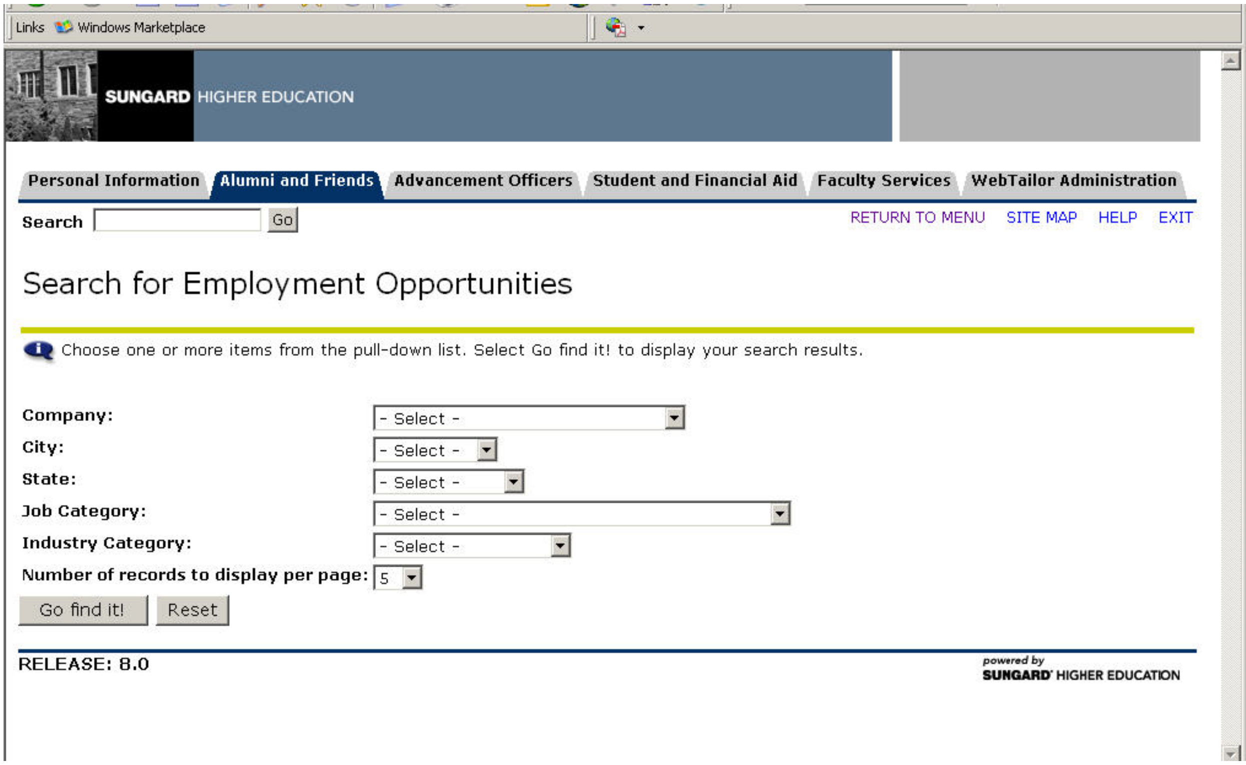
Search for all employment opportunities that have been posted

Steps

1. From the Alumni and Friends Main Menu, select the Career Opportunities link.
2. Select the **Search for Employment Opportunities** link.



3. Enter search criteria to find all those job opportunities entered



4. When the results show, verify that the jobs that you have posted appear on the Web.

Career Opportunities - Career Advising

The Career Opportunities menu allows the constituent access to the following features relating to Career Advising

- Am I already an Advisor? (View current advisor commitments.)
- Sign me up to be a Career Advisor.
- Find a Career Advisor.

Using the Career Advising options of Alumni and Friends Self-Service, constituents can check their own record to see if they have agreed to become an advisor, sign up to become an advisor, or obtain a list of career advisors using the following criteria

- a specific class year
- graduate degree
- major
- type of Advisor
- occupation
- industry category
- city or state of primary employer

The search produces an online report from which you can select the number of records to display at one time. The following information about an advisor appears on the report

- 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

When constituents decide to volunteer as career advisors, they choose from activity codes that represent career advisor roles. The year code for the activity can be the current year or any year for the next ten (10) years.

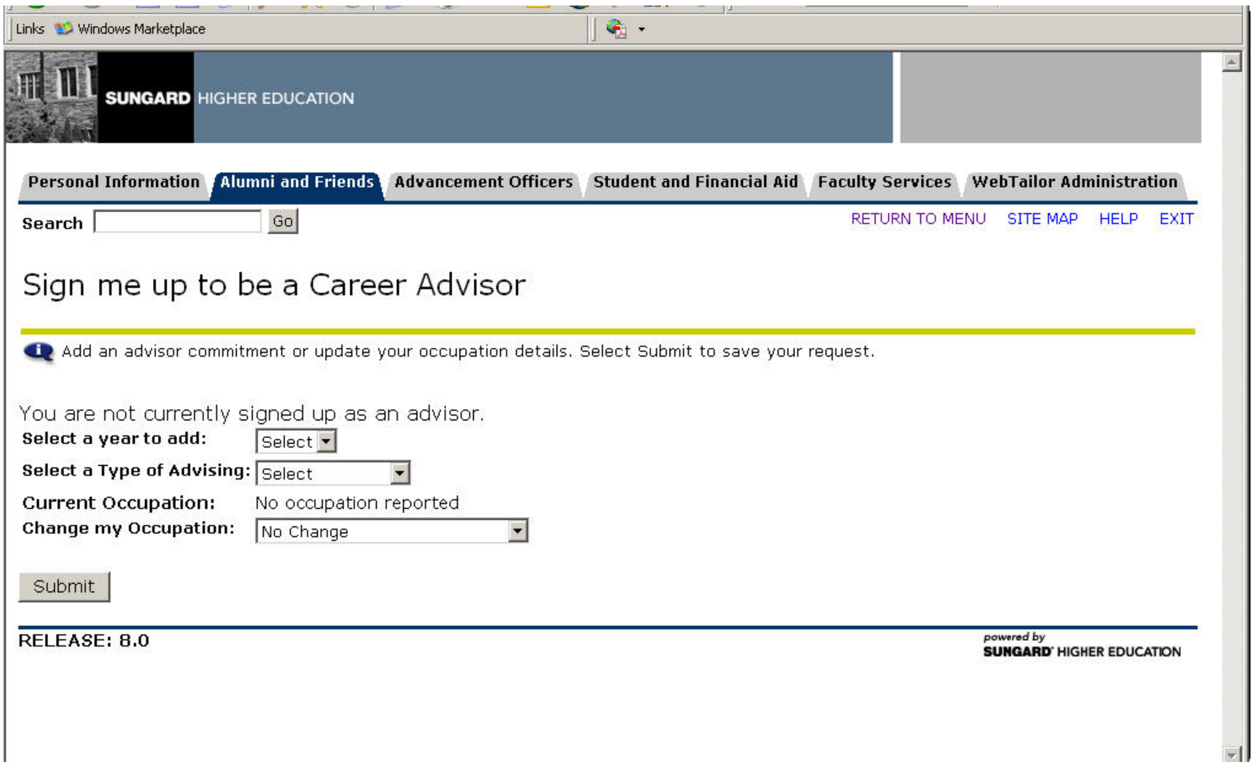
A constituent can sign up to be an advisor, even without an employment record; however, if the SIC, city, or state is entered as search criteria and either no employment record exists or no primary employer was identified, the advisor will not be returned.

Steps

Follow these steps to sign up to be a career advisor and verify that Banner has been updated with this new activity.

1. From the Career Opportunities menu select the **Sign me up to be a Career Advisor** link.

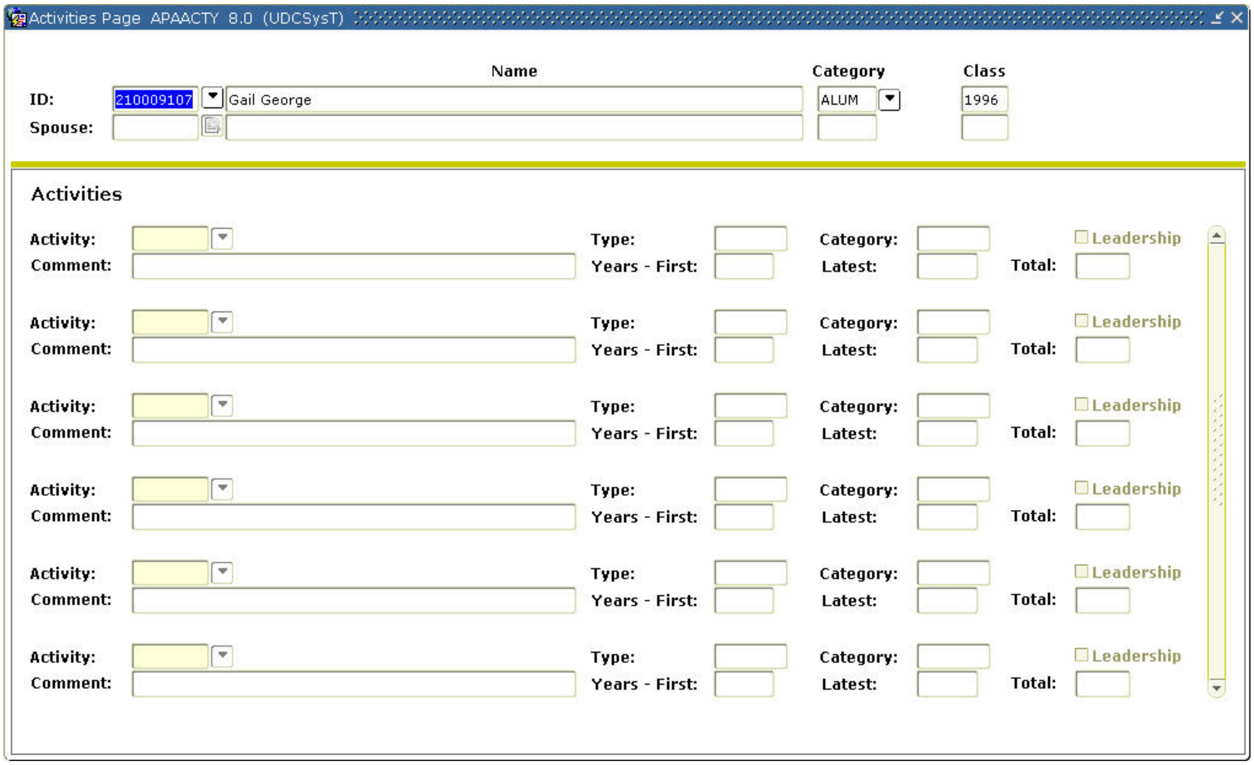
2. The information text should indicate any assignment that you already committed to; if you are not an advisor, then it will indicate that you are not currently signed up for advising.



3. Select year and type of advising from the drop-down menus.

4. Submit your information.

5. In Banner, access the Activities Form (APAACTY).



6. Enter your ID number In the **ID** field or perform a name search for your record.

7. Perform a **Next Block** function.

8. Verify that the activity with type of *CAREER ADVISOR* and the current year appear.

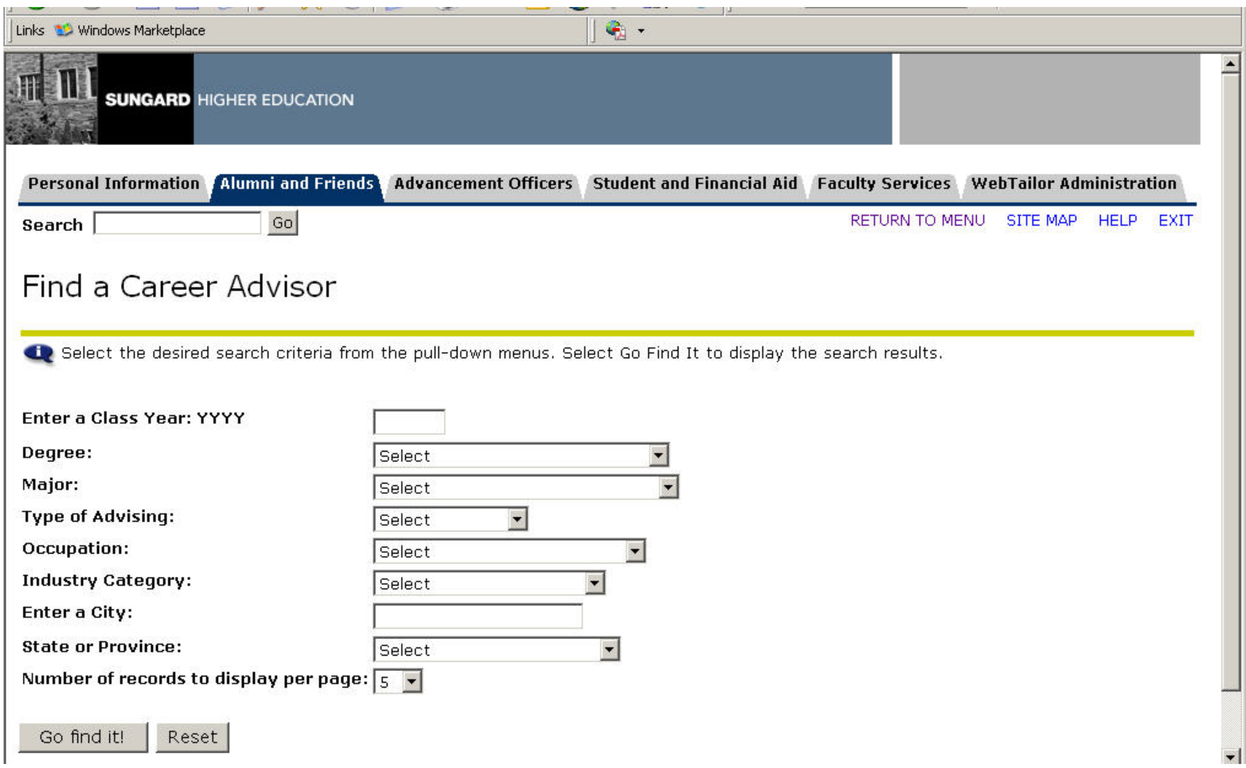
9. Click the **Exit** function.

Career advisor search

The Career Advisor Search provides the ability to search and locate a career advisor.

Steps

1. From Alumni and Friends Self-Service, select the Find A Career Advisor option.
2. Enter your search criteria and click the **Go Find It** button.



3. A list of results based on what you entered will appear

   Note: Details displayed are based on the profile settings.

4. Return to the Career Advising main menu.

Voluntary Support

When a constituent selects the Voluntary Support option from the Alumni Services menu page, the Voluntary Support page displays the following options

- View gift history.
- Make a Pledge.
- Make a Donation.

The View Gift History page displays a summary of pledges and gifts made Further details can be viewed by clicking on the links.

When you select the Make a pledge option, the page displayed enables you to set up and enter pledge details including the dollar amount, the campaign/designation, and the option to split credit for the pledge with your spouse. The installment details include the duration of the pledge payments, the frequency of the installments, the payment start date, and a section for comments.

Pledges made via Alumni and Friends Self-Service updates the Review External Web Pledges Form (AGAWPLG). Pledges must then be reviewed and accepted by an Advancement staff member before the pledge information updates any other Banner forms or tables.

Gifts and payments made via the Web are processed by a payment gateway that your school must have activated prior to allowing this option in Alumni and Friends Self-Service. Training for this set up is outside the scope of this workbook and is a task for your school's technical staff.

Credit card is the only form of payment that is allowed via the Web at this time.

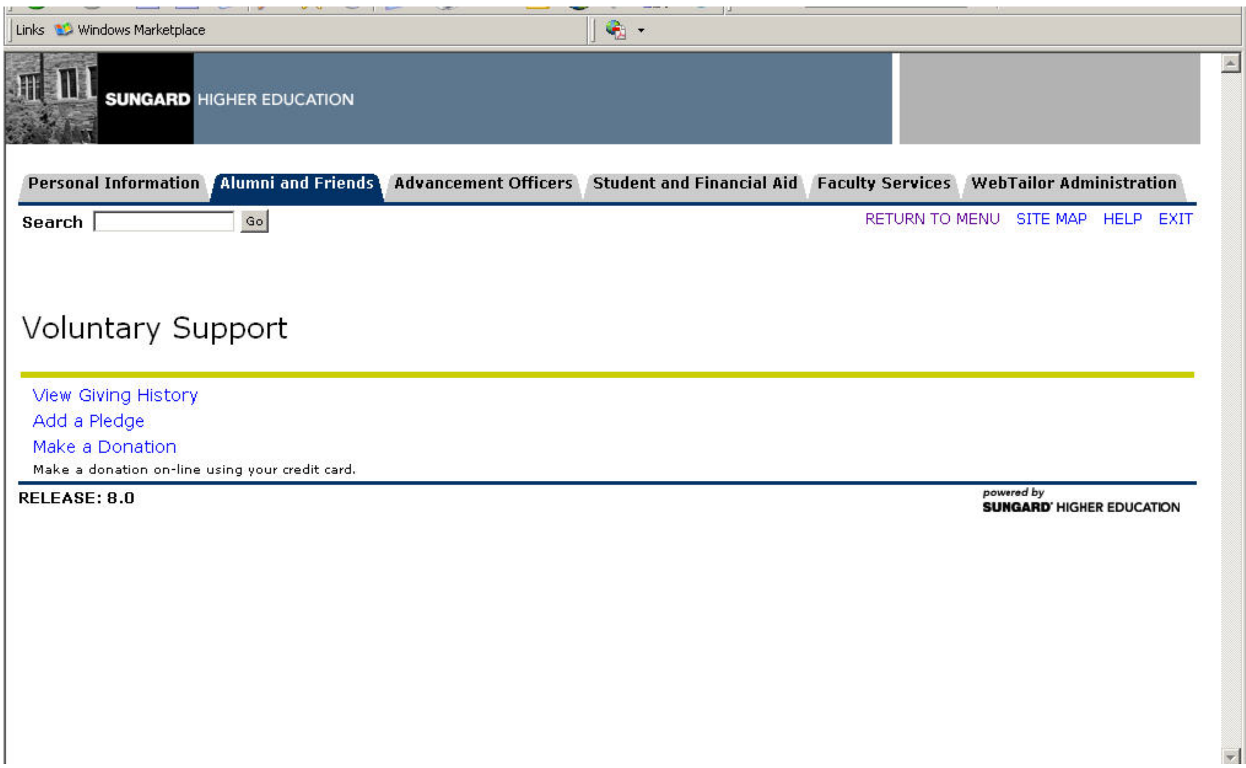
View giving history

View your pledge and gift history on the Web.

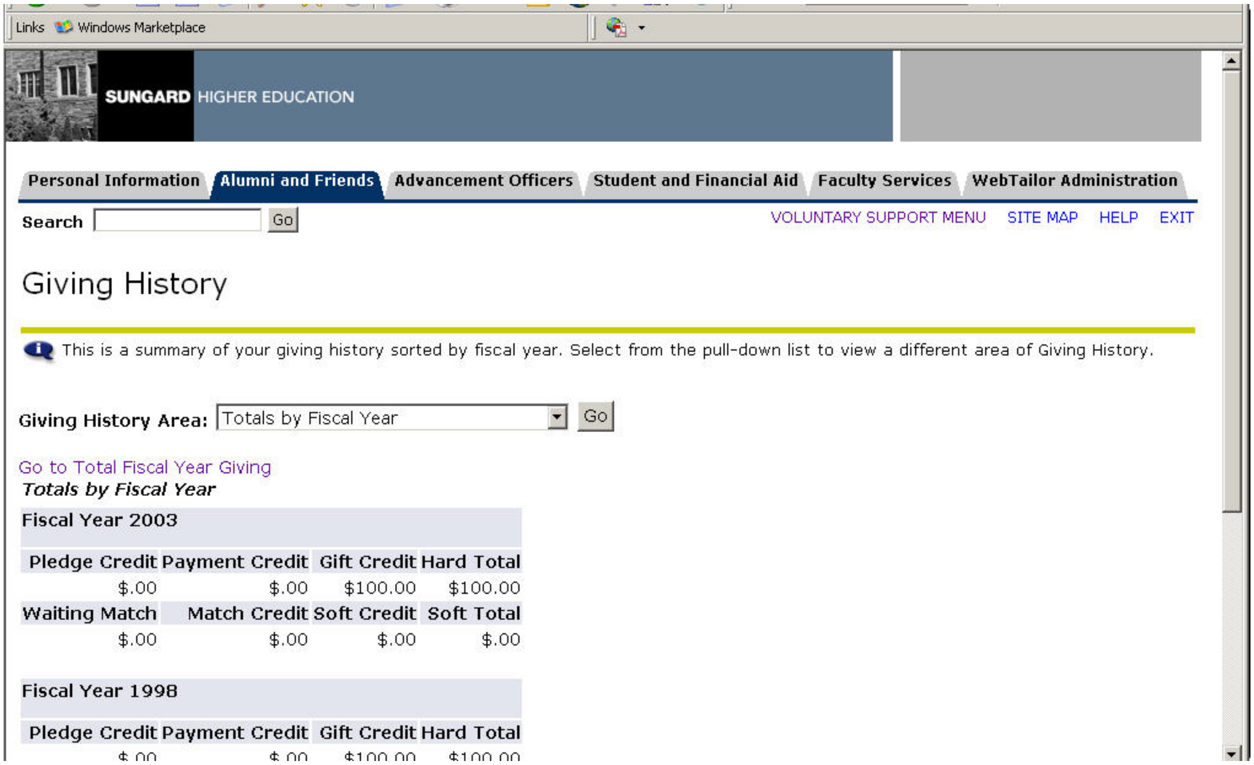
Steps

Follow these steps to complete the process.

1. Select the Voluntary Support option from the Alumni and Friends Main Menu.
2. Select the View Giving History link.



3. The default display of giving will appear. Note: Totals by Fiscal Year is the default.



4. From the drop down menu you may choose other giving history displays. Choose **All Existing Pledges**

5. The Date, Amount, Balance, Campaign, and Designation for each pledge displays on this page.

6. Return to the Voluntary Support menu.

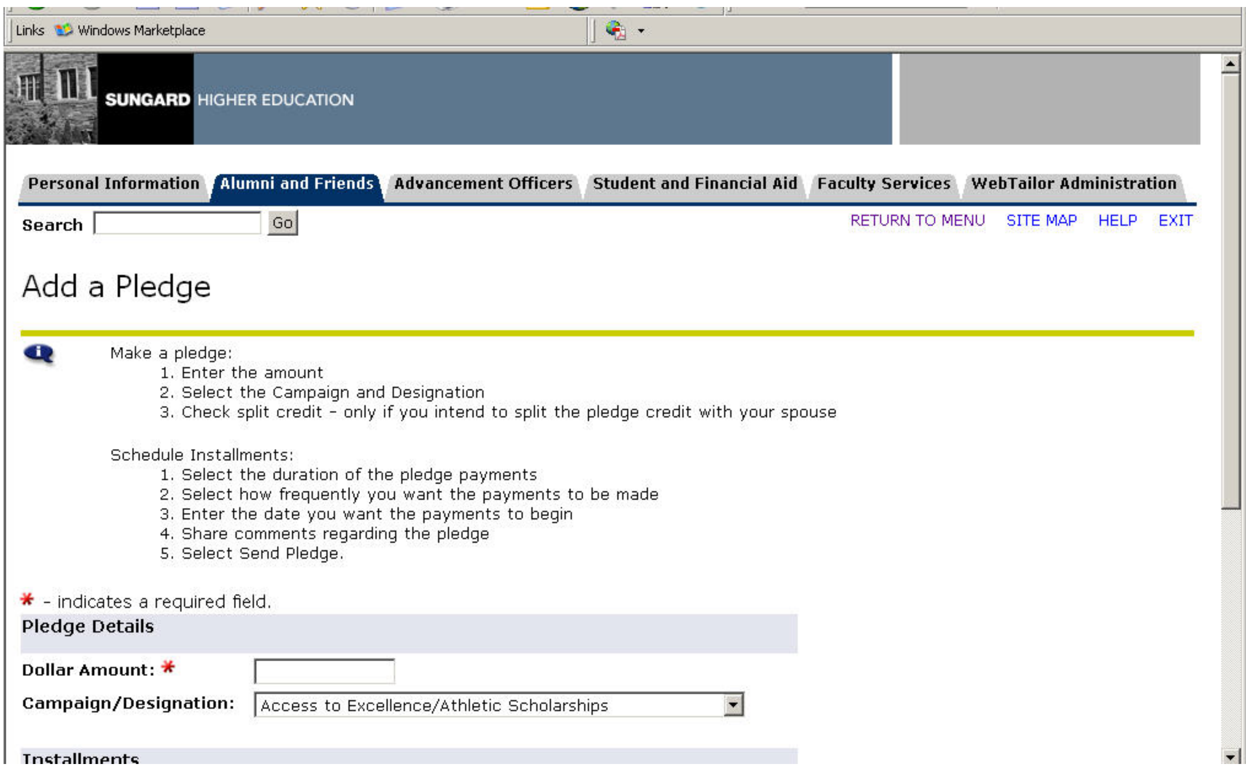
Add a Pledge

Make a new pledge via Alumni and Friends Self-Service and then verify that this information has updated Banner.

Steps

Follow these steps to complete the process.

1. Click the **Add a Pledge** option.
2. Enter a dollar amount in the **Amount** field.

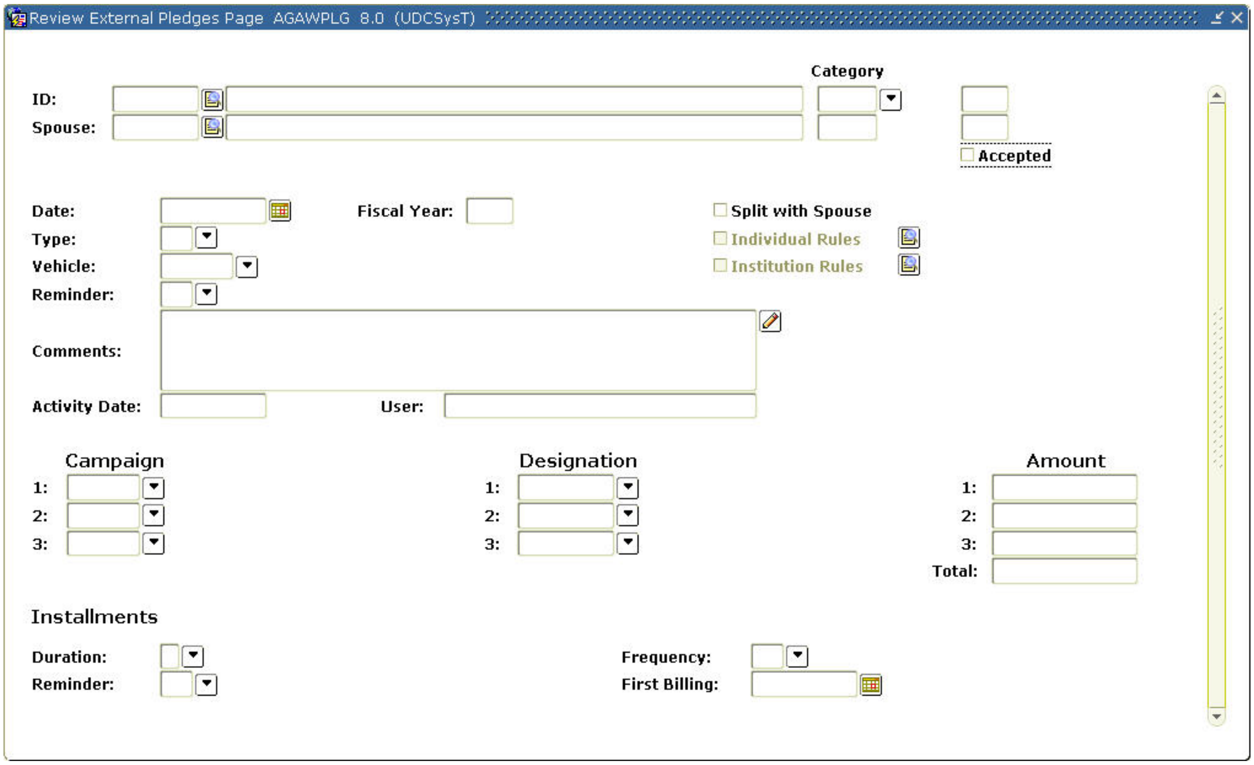


3. Select a Campaign/Designation from the drop-down menu at the **Campaign/Designation** field.
4. Under Installments, select a value from the drop-down menu for the **Duration** field.
5. Select a value for the **Frequency** field from the drop-down menu.
6. In the **Start Date** field, enter a start date in the MM/DD/YYYY format.
7. Enter free-text comments in the **Comment** box.

8. Select the **Send Pledge** button.

9. Return to the Voluntary Support menu.

10. Access Banner and access the Review External Pledges Form (AGAWPLG).



11. Review the pledge just entered. Be sure and enter the **Pledge Type** that pertains to this pledge. Make any other adjustments that need to be made.

12. Accept the pledge you just made on the Web.

13. Click the **Save** icon.

14. Create Banner pledges by choosing the Create Pledges option.

15. A message will appear stating **New Pledges have been created from Accepted Pledges.** Any pledges that had been marked as **Accepted** will now be set up on the donor's record and will be removed from the **AGAWPLG** list.

16. Click the **Exit** icon.

17. In Banner, access the Pledge List Form (AGCPLDG). Verify that the pledge you just 'pushed' to the donor's record displays.

18. Return to Alumni and Friends Self-Service.

19. Open the Voluntary Support screen.

20. Select View Pledge History.

21. Review the pledge data on this page.

22. Click on the **Balance Amount** to view detailed information for this pledge, including a breakout of payment amounts and due dates.

23. Return to the Alumni Services menu when you have reviewed the pledge information.

Make a gift or pledge payment

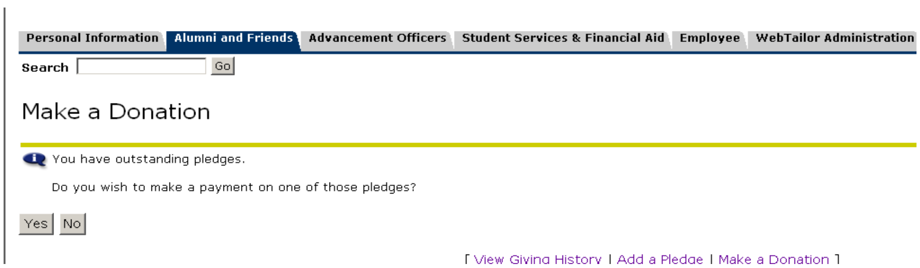
From the Make a Donation link you have the option of making a new gift or making a payment on an existing pledge.

Your school has a variety of options concerning validation of credit cards and when the charge is submitted to the credit card merchant through the payment gateway. These choices will affect the information the donor must enter. You should become familiar with the procedures that your school has developed.

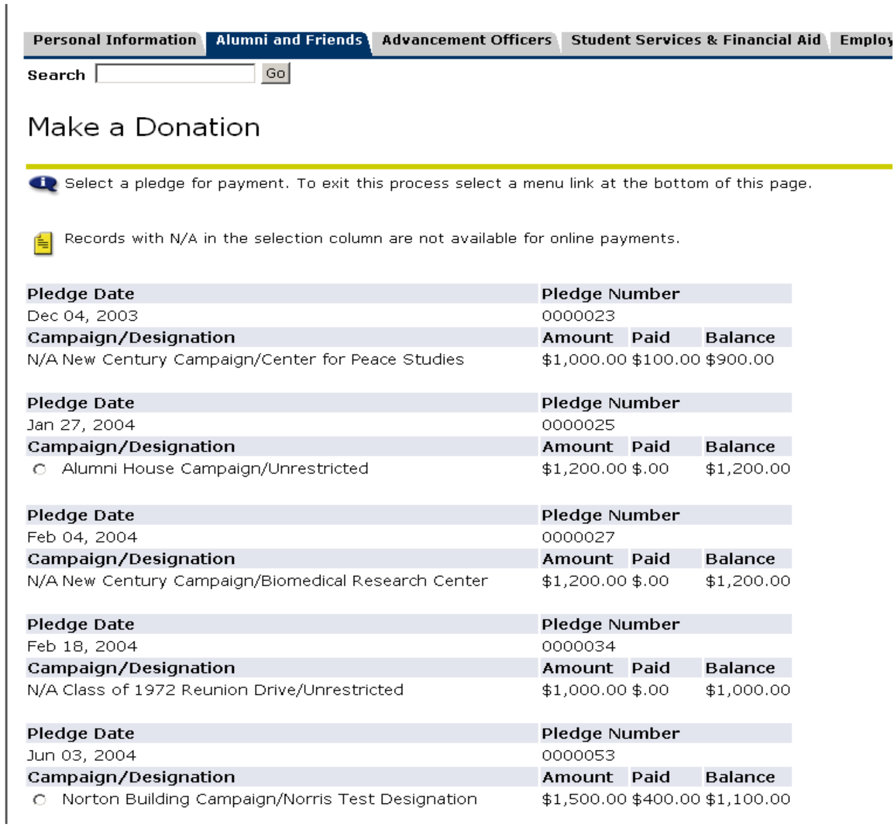
Steps

1. Click the Make a Donation option from the Voluntary Support Menu.

   Note: If you have outstanding pledges already set up in BANNER you will receive this message:

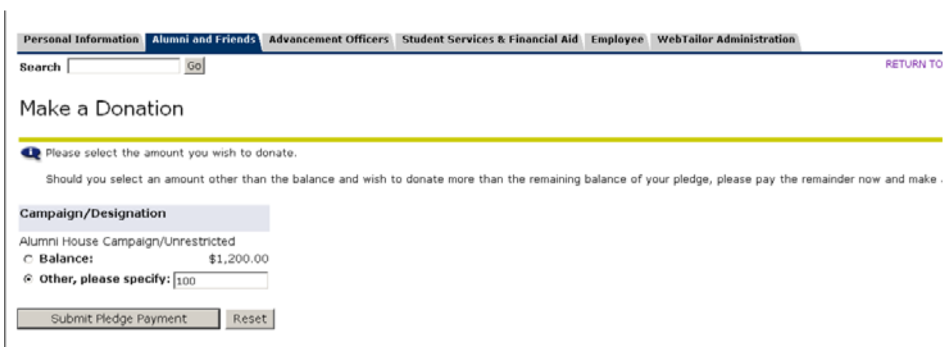


2. Choosing **Yes** will bring up a list of your pledges that have an outstanding balance. As the note explains, records with N/A are not available for online processing (you have not enabled the campaign/designation combination for web processing in Banner or the start and end dates on the combination have passed.)

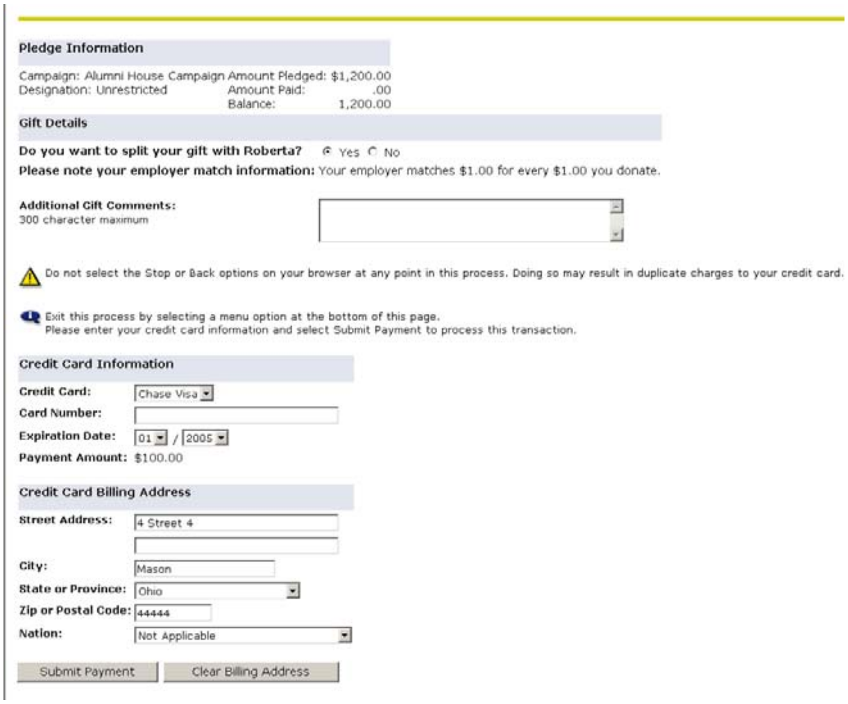


3. Select the pledge you would like to make a payment on and click the **Continue** button.

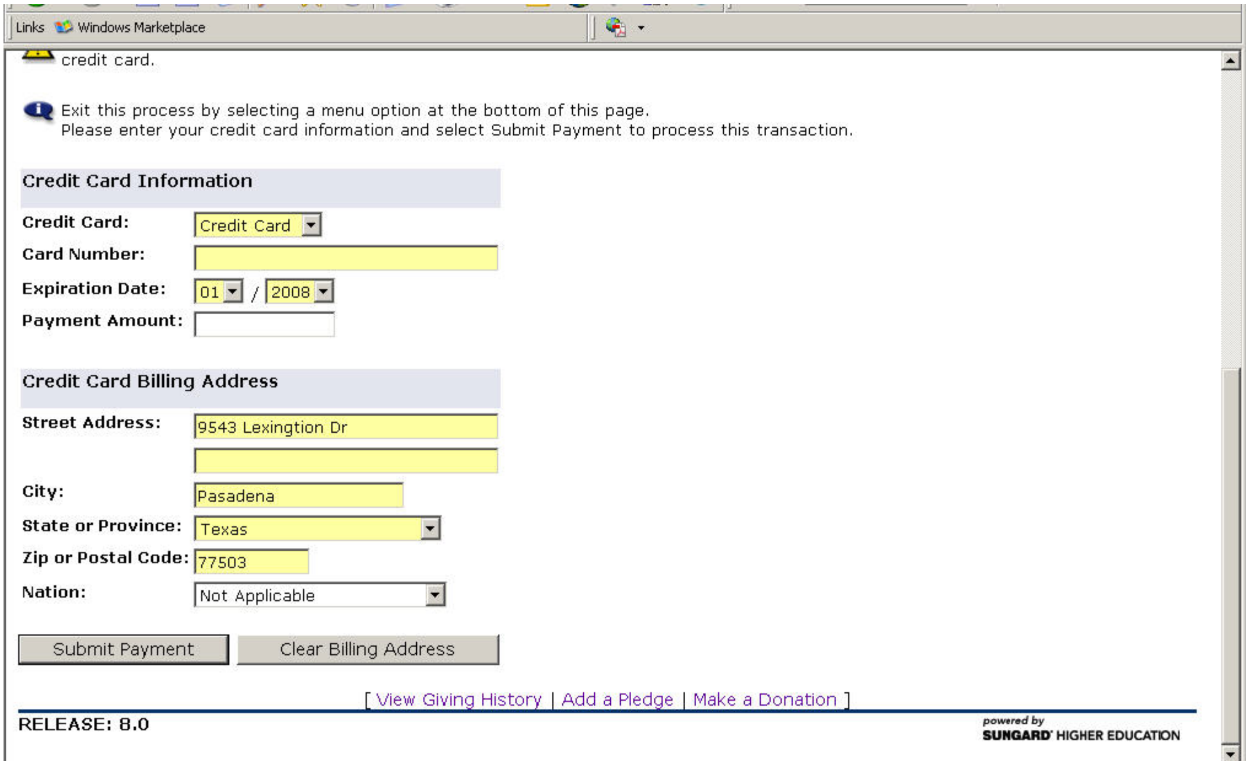
4. Either select the **Balance** button or choose **Other, please specify** button and enter the other amount. Select the **Submit Pledge Payment** button.



5. You have the option of splitting your payment with your spouse and entering a comment about your donation. Enter your credit card information on the Credit Card Payment window. Verify your billing address. Select the Submit Payment button.



6. This will access the Credit Card Verification screen. Review all information for accuracy.



7. If everything is accurate, click the **Submit Payment** button.

8. If changes need to be made click the **Clear Billing Address** button.

9. Once the payment is submitted, the Credit Card Payment Status screen will appear.

10. Once your payment has been accepted, you will have the option to make another donation or view your online receipt.

11. Click on the **View Online Receipt** button to see your receipt.

12. Click on the **View My Giving History** link to view all your donations.

13. The giving history shows the donation that you just made.

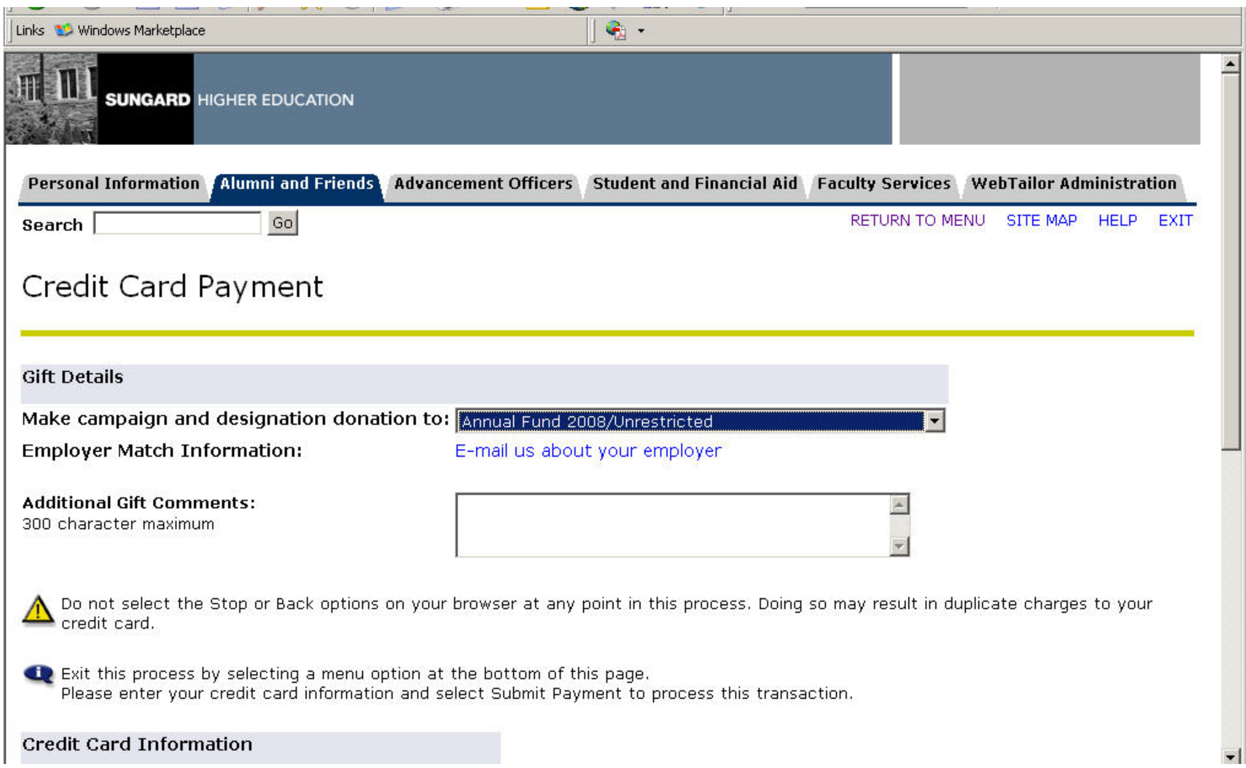
14. Return to the Make a Donation window.

Make a gift

Users have the ability to make a gift via Alumni and Friends Self-Service.

Steps

1. Click the Make a Donation option from the Voluntary Support Menu.
2. This time if you receive the "You have outstanding pledges" message choose **no** to make a new gift. Result: The Credit Card Payment window displays.
3. Choose the **campaign/designation** from the drop down list.



4. Add comments if necessary.
5. Complete the credit card information and verify the billing address.
6. Click the **Submit Payment** button.
7. This will access the Credit Card Verification screen. Review all information for accuracy.
8. If everything is accurate, click the **Okay to Submit Payment** button.

9. If changes need to be made click the **Change Information** button.

10. Once the payment is submitted, the Credit Card Payment Status screen will appear.

11. Once your payment has been accepted, you will have the option to make another donation or view your online receipt.

12. Click on the **View Online Receipt** button to see your receipt.

13. Click on the **View my Giving History** link to view all your donations.

14. The giving history shows the donation that you just made.

15. In Banner, access the Gift List Form (AGCGIFT). Verify that the gift you just made displays.

16. Gifts made via the internet will be entered in an open cashiering session for the default user id. You will need to reconcile the transactions, finalize the cashiering session and feed the transactions to Banner Finance, just as you would with gifts you entered directly in Banner.

Volunteer Opportunities

The final option from the Alumni Services menu is Volunteer Opportunities. When a constituent accesses this option, two more choices are presented:

- More information on ways you can volunteer to help the University
- View or update contact information

This first option, More information on ways you can volunteer to help the University, has been populated by the Advancement staff of the institution, offering the constituent a number of possibilities for service. Example: Upcoming events such as homecoming or reunions may be advertised. Alternatively, the university may use this venue to solicit nominations for board membership, awards or provide planned giving information. Helpful links to other university sites may be displayed here.

The other option under Volunteer Opportunities is View or update Contact information. This information is determined by the constituent's role in one or more of the solicitor/organizations, and allows a constituent to update his or her current volunteer profile. The options available are:

- View or update your volunteer information
- View or update contact information
- View contact detail information
- Add contact results
- View contact results

Volunteer solicitors can update or view the results of each contact they make for fundraising. The institution, using Banner forms, controls who can change information via the Web. This information includes:

- Ask amount
- Contact type
- Date of contact
- Contact results
- Comments regarding the contact

Alumni volunteers can select from a list of contacts assigned to them on the Web per the Campaign Solicitors Form (AFACSLT) or the Solicitor Annual Goals form (ASASANG). Alumni can also e-mail the appropriate institution staff for communication when needed.

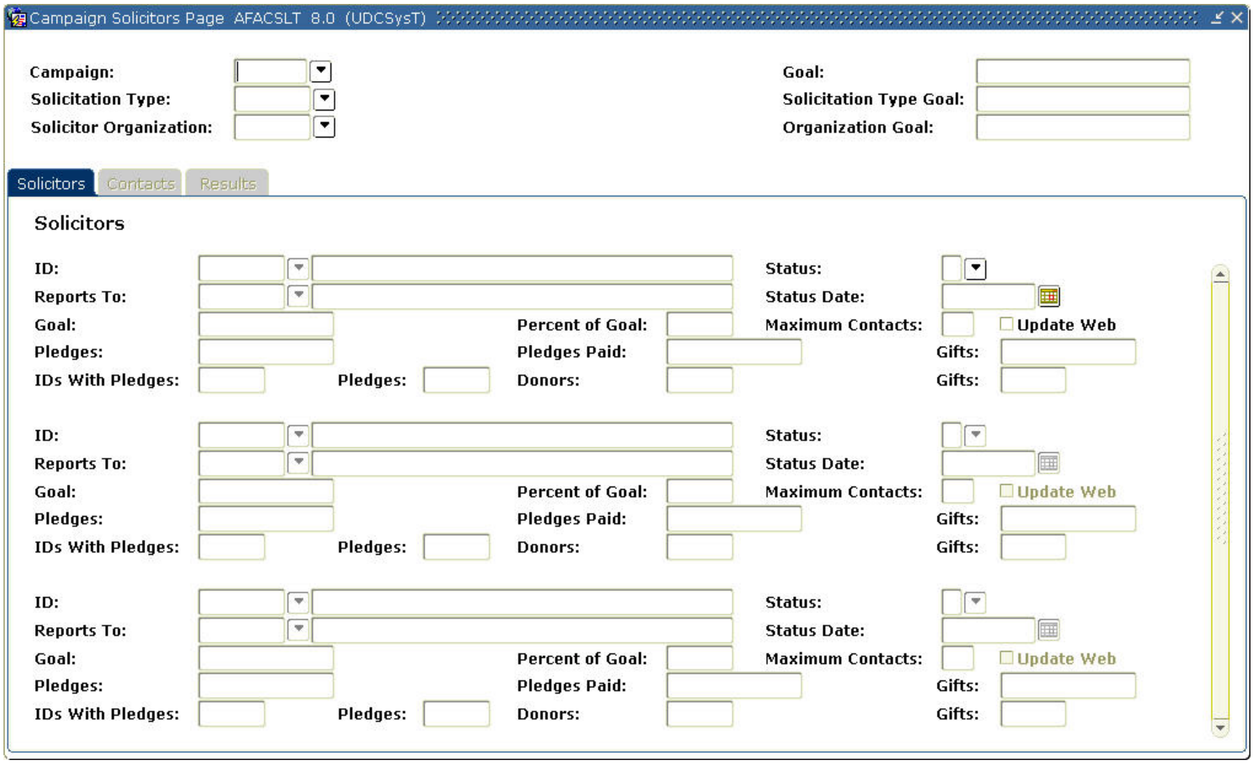
The Advancement Self-Service Rules Web page defines the contact assignment start and end dates range.

Organizations

Solicitor Organization processing assists in effectively managing fundraising organizations. This processing function tracks the staff and volunteer organizations involved and permits you to:

- establish a solicitor organization with solicitors
- view a list of solicitor organizations
- add and maintain requirements and criteria by which constituents will be assigned to a solicitor
- add and maintain comments about a solicitor organization
- establish and view geographic/regional data.

View



Steps

Make yourself a solicitor either on the Campaign Solicitors Form (AFACSLT) or the Solicitor Organization Header Form (ASASORG). The example below demonstrates the Campaign Solicitors Method of setting up a solicitor.

Note: Solicitor Organization set-up was covered in a previous training session. The steps below assume that valid organizations exist for you to use.

1. In Banner, access the Campaign Solicitors Form (AFACSLT).
2. Double-click in the **Campaign** field and select a campaign from the LOV.
3. Perform a **Next Block** function.
4. In the **ID** field, enter your ID.
5. Double-click in the **Status** field and select the code to identify *Active*.
6. Select Contacts from the **Options** menu.
7. In the **ID** field, select the **Search** function and select a constituent from the Constituent Search Form (AOAIDEN).

8. Double-click in the **Rating** field and select a code to identify *Excellent* from the Rating Code Validation Form (ATVRATE).

9. Double-click in the **Rater Type** field and select a code to identify *Volunteer* from the Rating Screen Code Validation Form (ATVRSCR).

10. Navigate to the **Ask Amount** field and enter *500.00*.

11. In the **Date** field, enter a date to indicate when you expect to make the contact.

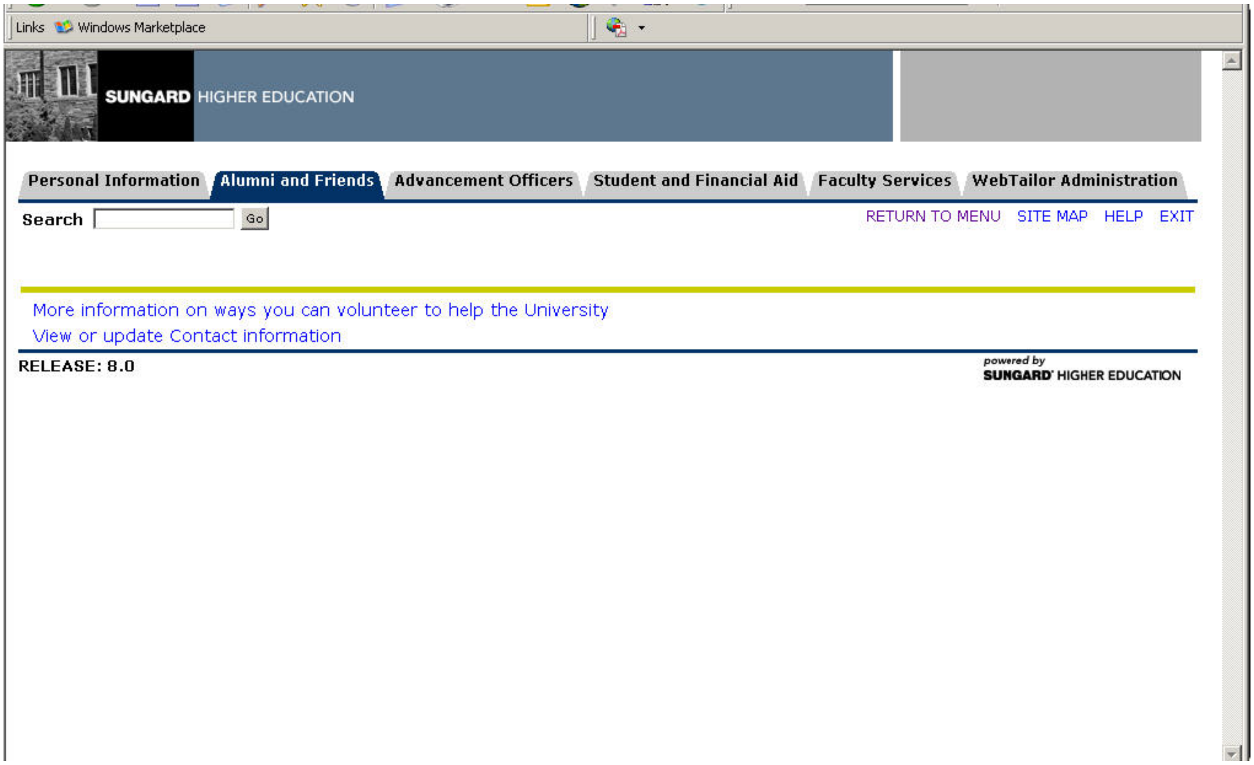
12. Click the **Save** icon.

13. Click the **Exit** icon.

14. Return to Alumni and Friends Self-Service.

15. Select Volunteer Opportunities.

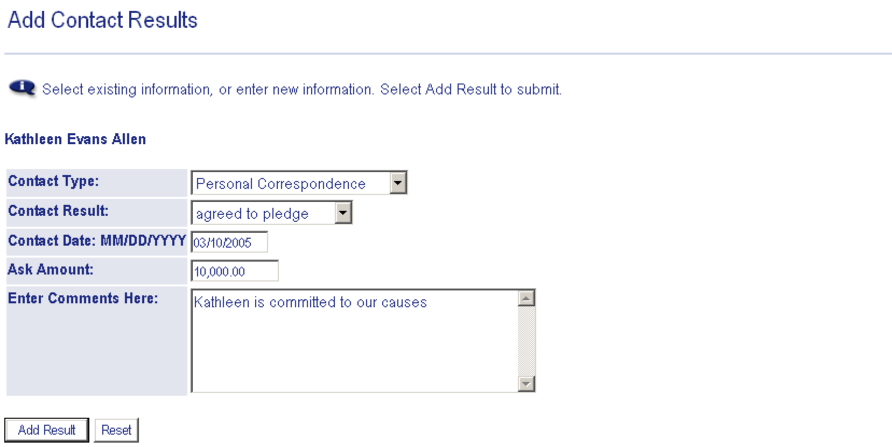
16. Select View or update Contact information.



17. A drop down menu with the list of contacts set up for you in Banner displays on the Web. Select the contact you want to view and choose the **View Details** button.

18. The information you entered for that contact in Banner now displays on the Web. If you would like to enter the results of a meeting with this contact choose the **Add a Result** option.

19. Using the drop down lists choose the Contact Type, Contact Result, Contact Date, Ask Amount (if there is one) and Comment.



20. Click the **Add Result** icon. You will be returned to the **View Contact Detail Information** form and a message stating **Your Contact Result has been successfully processed** will appear.

21. In Banner, access the Campaign Solicitors Form (AFACSLT).

22. Verify that the information from the Web has updated Banner.

23. Click the **Exit** icon.

Web Gifts No PIDM

The 'Web No PIDM' option enables personal information and a gift to be created via the Web for a person who does not currently have a Banner ID or does not know their Self-Service login ID and PIN. Functionality includes holding tables, Banner review forms and a process to 'push' the new records into the data tables. A notification can be sent to a person in your office indicating that a new ID and new gift has been created.

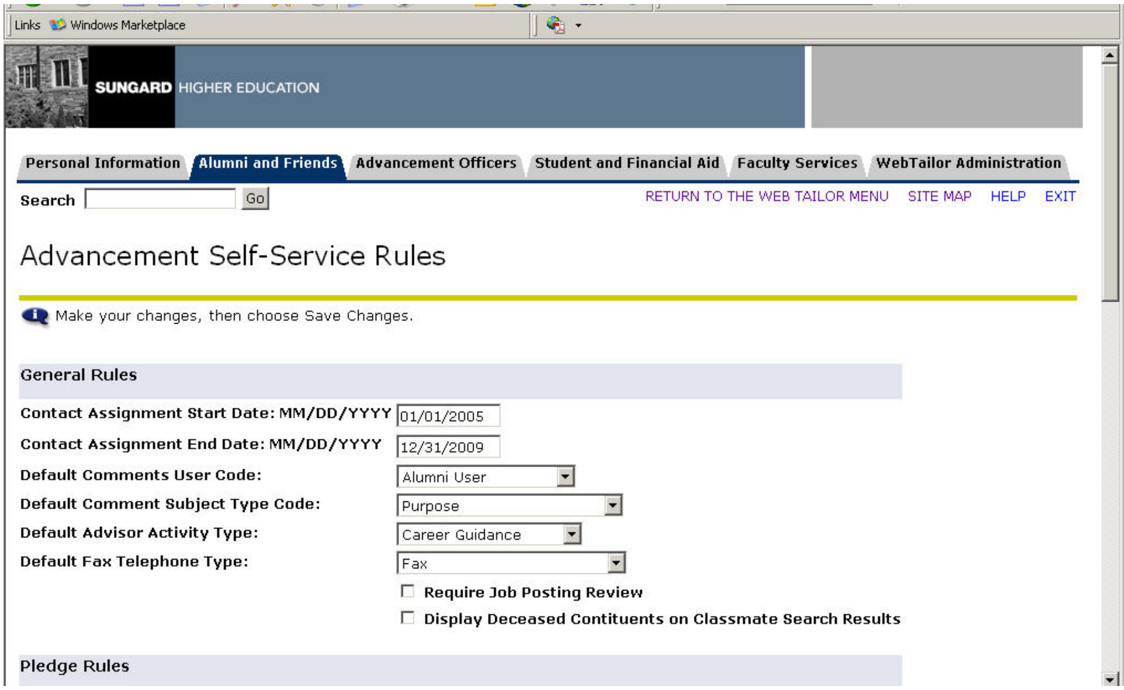
Set up Banner Advancement Self-Service Rules page

Use this form to indicate a User ID to send messages to when a new person creates a gift via the web. The message is sent within Banner and appears as a waiting message immediately upon creation. Only one ID can be selected. If no ID is selected in the rules set up, no message is sent when new records and gifts are created. This rule is not required for the process to function, although it is advisable to enter a staff member who will review the information regularly. The message is delivered in Banner on the General Message Form (GUAMESG).

Steps

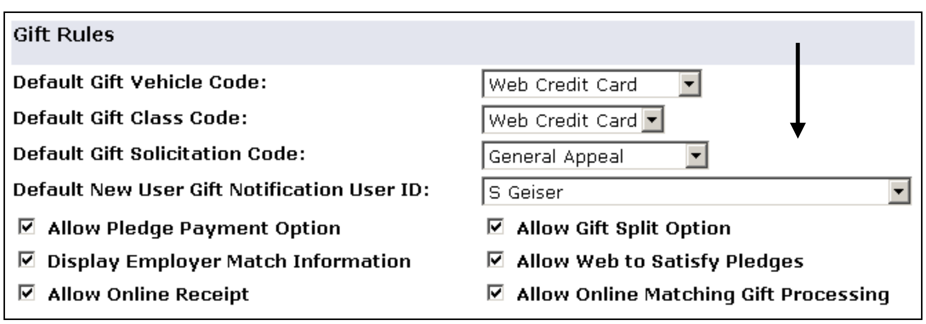
1. Access the Customize Advancement Self-Service Rules page by selecting Advancement Self-Service Rules from the Web Tailor main menu.

2. Under the General Rules Header, change the Default Fax Telephone Type to the appropriate value at your institution for the fax number record. Any fax record created via the personal information page will be stored with this value for the type.



3. Scroll down to view the Gift Rules Header.

4. Under the Gift Rules Header, enter the person who should receive notification when a no PIDM gift is submitted.

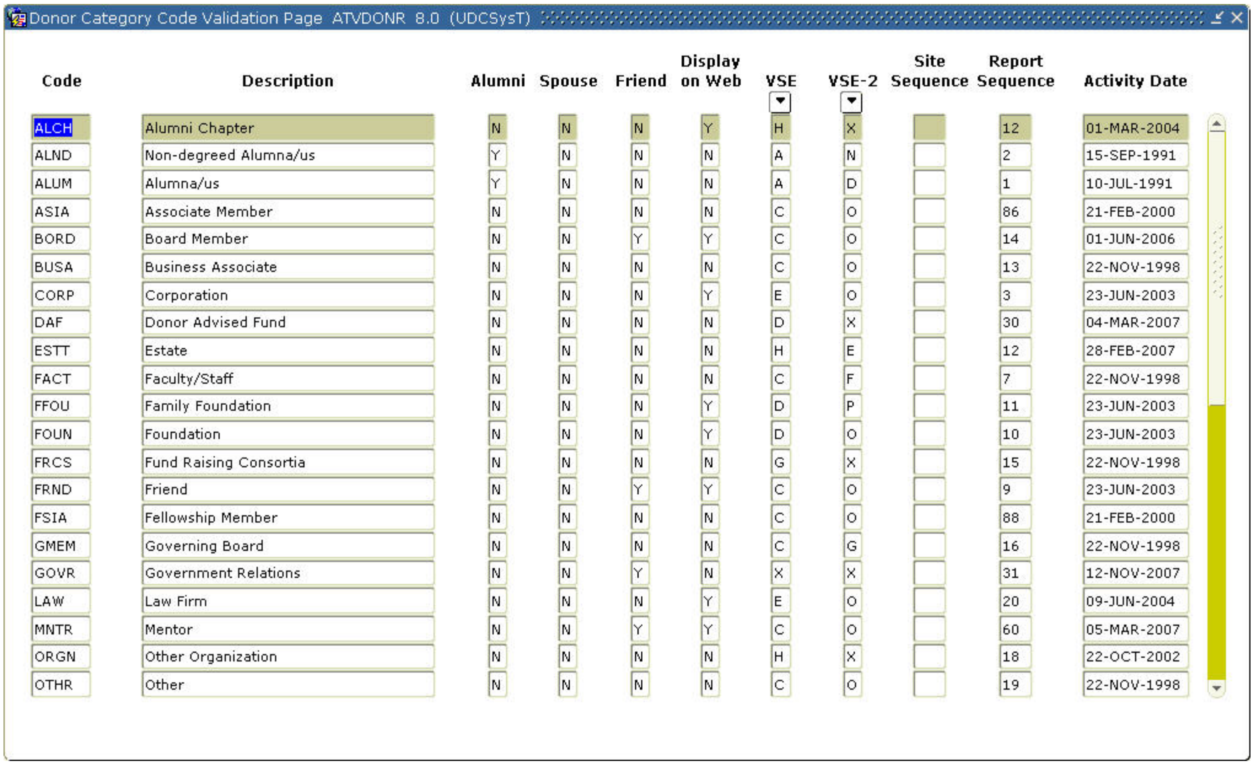


5. Click the **Save Changes** button.

Donor Category Validation Form (ATVDONR)

Access the Donor Category Validation Form (ATVDONR) to verify which donor categories to include in the selection list of the Personal Information page. Setting the **Web Indicator** to Y includes the donor category for web selection.

View



Donor Category Code Validation Page ATVDONR 8.0 (UDCSysT)

Code	Description	Alumni	Spouse	Friend	Display on Web	VSE	VSE-2	Site Sequence	Report Sequence	Activity Date
ALCH	Alumni Chapter	N	N	N	Y	H	X		12	01-MAR-2004
ALND	Non-degreed Alumna/us	Y	N	N	N	A	N		2	15-SEP-1991
ALUM	Alumna/us	Y	N	N	N	A	D		1	10-JUL-1991
ASIA	Associate Member	N	N	N	N	C	O		86	21-FEB-2000
BORD	Board Member	N	N	Y	Y	C	O		14	01-JUN-2006
BUSA	Business Associate	N	N	N	N	C	O		13	22-NOV-1998
CORP	Corporation	N	N	N	Y	E	O		3	23-JUN-2003
DAF	Donor Advised Fund	N	N	N	N	D	X		30	04-MAR-2007
ESTT	Estate	N	N	N	N	H	E		12	28-FEB-2007
FACT	Faculty/Staff	N	N	N	N	C	F		7	22-NOV-1998
FFOU	Family Foundation	N	N	N	Y	D	P		11	23-JUN-2003
FOUN	Foundation	N	N	N	Y	D	O		10	23-JUN-2003
FRCS	Fund Raising Consortia	N	N	N	N	G	X		15	22-NOV-1998
FRND	Friend	N	N	Y	Y	C	O		9	23-JUN-2003
FSIA	Fellowship Member	N	N	N	N	C	O		88	21-FEB-2000
GMEM	Governing Board	N	N	N	N	C	G		16	22-NOV-1998
GOVR	Government Relations	N	N	Y	N	X	X		31	12-NOV-2007
LAW	Law Firm	N	N	N	Y	E	O		20	09-JUN-2004
MNTR	Mentor	N	N	Y	Y	C	O		60	05-MAR-2007
ORGN	Other Organization	N	N	N	N	H	X		18	22-OCT-2002
OTHR	Other	N	N	N	N	C	O		19	22-NOV-1998

Steps

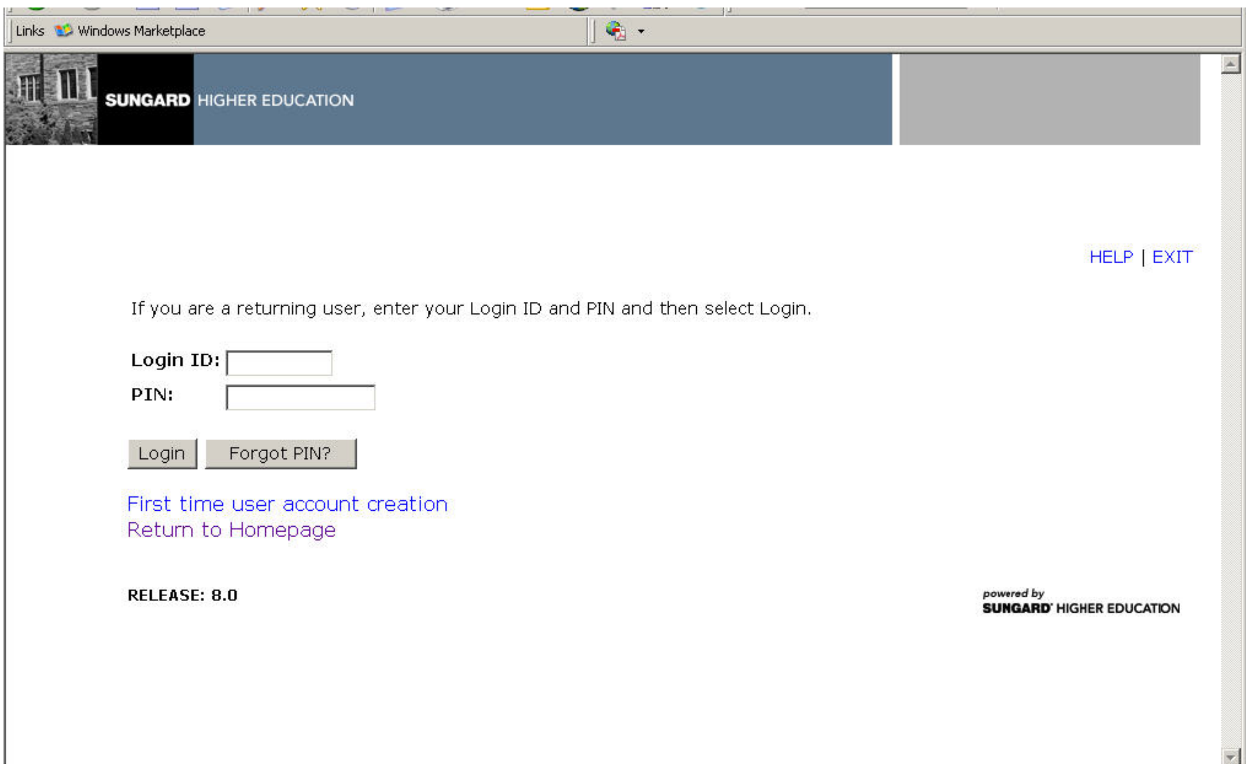
1. Access the Donor Category Validation Form (ATVDONR)
2. In the **Web Indicator** box, verify that there is a ‘Y’es for each donor category that you want to make available for selection in Self-Service.
3. In the **Friend** column, verify that there is a ‘Y’es for each donor category where the ID should have access to the Voluntary Support area.
4. Click the **Save** icon.
5. Click the **Exit** icon.

No PIDM login

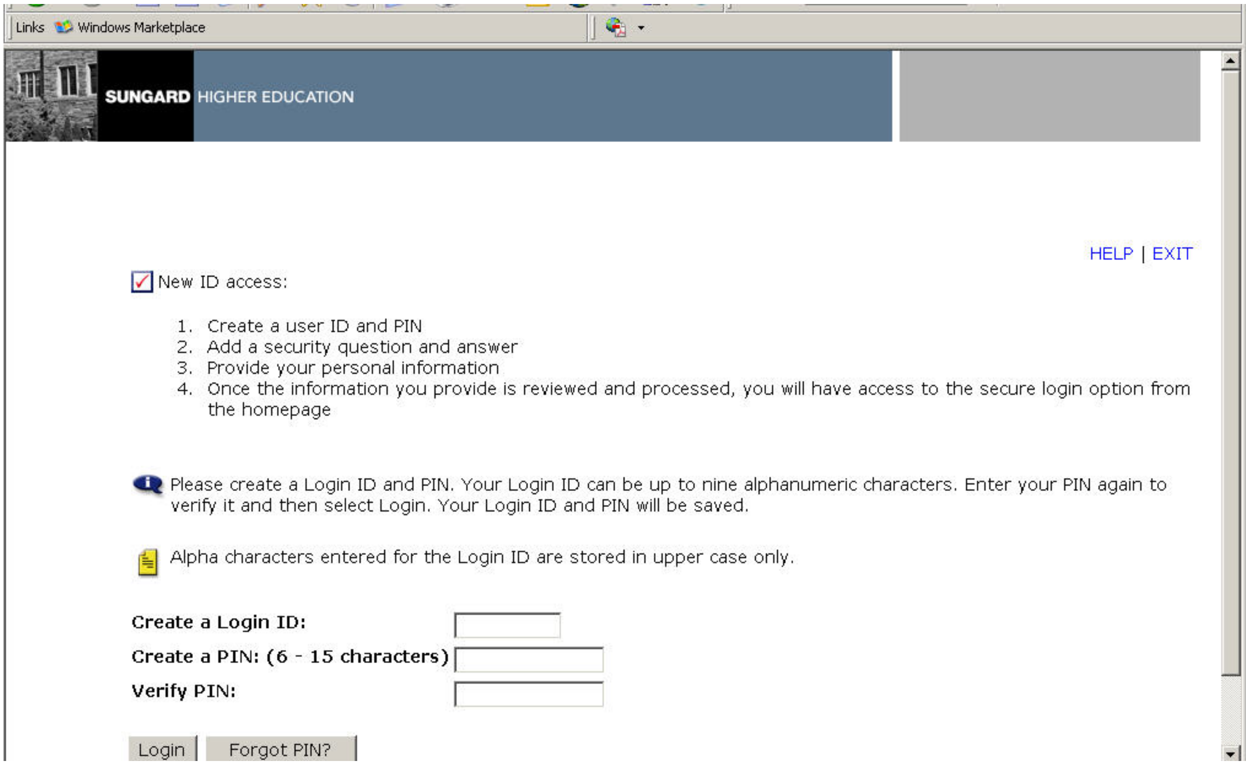
The Advancement Login page provides the ability for a Web user to login with a previously defined Login ID and PIN or to request the creation of a new Login ID and PIN. This page is not directly accessible from any other menu or page. When a Web user attempts to access a page on the Alumni and Friends menu, they will be forced to login and then forwarded to the requested page.

Steps

1. The user would access the Self-Service Main Menu and select Alumni and Friends.
2. Select Make a Donation.
3. Click on the First time user account creation link



4. Create a user Login ID and PIN



5. Verify your PIN

6. Click the **Login** button.

7. Users will then be prompted to create a security question and answer.

8. Complete the form and click the **Submit** button.

9. Complete the required Personal Information

10. Click the **Submi**t button.

11. You will now be on the Make a Donation page to make a gift.

12. From this point on, the process for making a donation is the same for someone who had logged on with an ID that had already been established through Banner.

13. Choose the campaign/designation from the drop down list

14. Add comments if necessary

15. Complete the credit card information and verify the billing address.

16. Click the **Submit Payment** button.

17. This will access the Credit Card Verification screen. Review all information for accuracy.

18. If everything is accurate, click the **Okay to Submit Payment** button.

19. If changes need to be made click the **Change Information** button.

20. Once the payment is submitted, the Credit Card Payment Status screen will appear.

21. Once your payment has been accepted, you will have the option to make another donation or view your online receipt.

22. Click on the **View Online Receipt** button to see your receipt.

23. Click on the **View my Giving History** link to view all your donations.

24. The giving history shows the donation that you just made.

25. To see the details of the donation, click on the amount.

26. To view any personal information, change your Pin, etc, click on the My Information link.

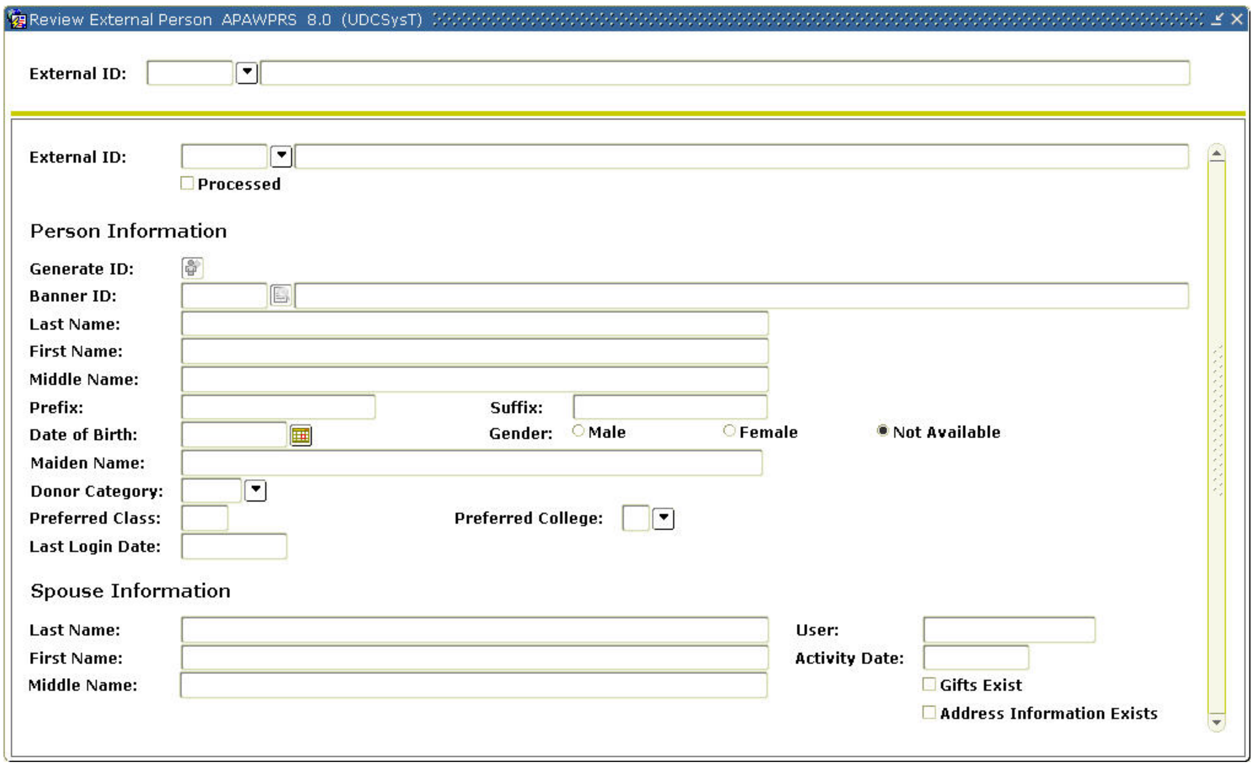
27. Once you have completed making donations or updating your personal information, click on the **Return to Alumni and Friends** link.

Review External Person Form (APAWPRS)

The Review External Person Form (APAWPRS) allows the user to review records stored in the hold table in Banner. This is where all no PIDM person information is held until they are reviewed to see if the person already has an Banner ID.

If you indicated a person to notify in Advancement DataTailor, that person will receive a ‘tickler’ that a new record has been created.

View



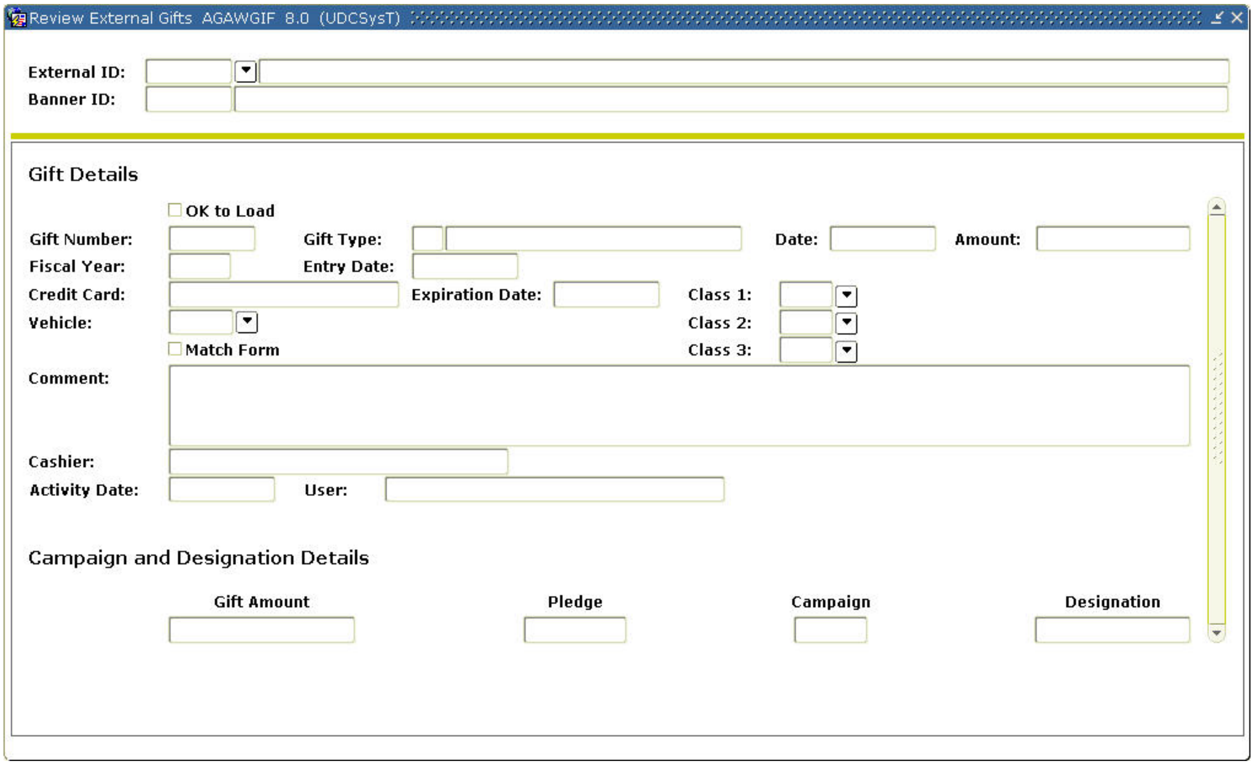
Steps

1. Access the Review External Person Form (APAWPRS).
2. Review the information that is entered
3. Search for a potential match in Banner and link to the existing ID if a match is found.
4. Create an Banner ID if no match is found.

Review External Gifts Form (AGAWGIF)

The Review External Gifts Form (AGAWGIF) allows the user to review records stored in the holding table. This is where all no PIDM gift donation information is held until reviewed by a staff member and “pushed” into Banner.

View



Steps

1. Review External Gifts Form (AGAWGIF)
2. Review the existing information
3. Click the **OK to Load** check box.
4. Click the **Save** icon.
5. Select the Create Gifts option to push the donation into Banner.

Self Check

Directions

Use the information that you have learned in this workbook to complete this self check activity.

Question 1

What menu should be accessed if a constituent wants to create an interest profile?

a) Communications

b) Career Advising

c) Voluntary Support

d) Personal

Question 2

You use the Interest Code Validation Form to add a new interest code in Banner.

True/False

Question 3

As a constituent you do not have the option to include or exclude items that are displayed in Find A Classmate about yourself.

True/False

Question 4

Of the following statements, which statement is false? The Advancement E-Mail Address Form (APAEMAL) can:

a) store an unlimited amount of e-mail addresses for any Banner ID

b) only one e-mail can be designated as preferred.

c) indicators determine whether or not to display E-mail information and the URL on the web.

d) all of these statements are true.

Question 5

What form displays a summary for pledges made including the date the pledge was made, the amount of the pledge and the balance owed for each pledge?

a) View Pledge History

b) Review External Web Pages

c) Activities Form

d) Directory Profile Form

Question 6

When on the Designation Form, the Allow Web Pledges and Allow Web Gifts check boxes determine whether the designation accepts Web gifts, Web pledges or both.

True/False

Answer Key

Question 1

What menu should be accessed if a constituent wants to create an interest profile?

a) Communications

b) Career Advising

c) Voluntary Support

d) Personal

Question 2

You use the Interest Code Validation Form to add a new interest code in Banner.

True

Question 3

As a constituent you do not have the option to include or exclude items that are displayed in Find A Classmate about yourself.

False. Each constituent may change their profile to include or exclude items that are displayed about themselves in Find A Classmate.

Question 4

Of the following statements, which statement is false?

a) The Advancement E-Mail Address Form (APAEMAL) can:

b) Store an unlimited amount of e-mail addresses for any Banner ID

c) Only one e-mail can be designated as preferred.

d) Indicators determine whether or not to display E-mail information and the URL on the web.

e) **All of these statements are true.**

Question 5

What form displays a summary for pledges made including the date the pledge was made, the amount of the pledge and the balance owed for each pledge?

a) View Pledge History

b) Review External Web Pages

c) Activities Form

d) Directory Profile Form

Question 6

When on the Designation Form, the Allow Web Pledges and Allow Web Gifts check boxes determine whether the designation accepts Web gifts, Web pledges, or both.

True

Appendix

Forms Job Aid

Form	Full Name	Use this Form to...
GOAADRL	Address Role Privileges Form	identify address types used by each role and define the privileges for Web address information processing.
GOATPAD	Third Party Access Audit Form	assign and maintain PIN numbers.
GOATPAC	Third Party Access Form	reset or update PIN information, disable a PIN, set a PIN expiration date, or force the display of terms of usage for third party access products such as the Web.
GOAEACC	Enterprise Access Control Form	associate the Oracle username with the Banner ID of users who can perform various processing functions in Banner and associated products in Self-Service.
GOADIRO	Directory Option Rule Form	view the options for items to include in individual profiles and institutional directories via the Web.
GOADPRF	Web User Directory Profile Form	store constituent modifications to their personal directory profile and modify the information that displays for a particular constituent.
STVACTP	Activity Type Validation Form	define activity type codes and descriptions that affect the Advancement Web Rules page.
ATVDONR	Donor Category Validation Form	define the classification of records, enable access, assign roles to IDs, and determine the pages to which an individual has access.
ATVPSTA	Pledge Status Code Validation Form	define the status codes that are assigned to pledges.
GUAIDEN	User Identification Control Form	associate system IDs with names of users and validate supervisor IDs entered on AGACTRL.
ATVSOLC	Solicitation Type Code Validation Form	define codes and descriptions identifying solicitation techniques for raising money.
AFACSLT	Campaign Solicitors Form	track the overall results of solicitors within a solicitor organization when using the Campaign method.
ASASANG	Solicitor Annual Goals Form	define annual goals for a solicitor within a solicitor organization when using the Year method.
AOAJPST	Job Posting Form	store job posting information for an existing, valid organization.

Form	Full Name	Use this Form to...
AFACAMP	Campaign Header Form	establish a campaign on the system.
ADADESG	Designation Form	establish a designation on the system.
AMAINFO	Advancement Prospect Information Form	identify a constituent/organization as a prospect.
ATVIGRP	Interest Group Code Validation Form	store the interest group code and a long and short description.
AUAIGRP	Interest Group Detail Form	enter details that are related to a particular interest such as event titles, dates, and URL addresses.
GTVMAIL	Mail Code Validation Form	define and describe mailing codes that appear on the Web.
GTVEMAL	E-mail Address Type Validation Form	determine which e-mail addresses display and/or be updated via the Web.
GTVSDAX	Crosswalk Validation Form	define the order in which the campaign/designation lists are displayed when creating gifts via the Web.
APAIGRP	Constituent Interest Group Form	store and update interest profile information.
APACOMT	Constituent/Organization Comment Form	view comments (general information) that an individual made via the Web
APIWCHG	Web Changes Information Form	view updates to an individual's information (children, job, degree, address comments) made via the Web
GOAADDR	Address Review and Verification Form	review and verify address information entered on the Web of via an Banner entry form.
GUASRVY	Survey Definition Form	define information regarding a survey including whether it appears on the Web.
GOISRVY	Survey Response Query Form	view responses to a survey by ID.
GUISRVS	Survey Summary Query Form	view comprehensive survey results.
APAMAIL	Advancement Mail Form	maintain information on mailings so that individuals can view and update mailing lists via the Web.
APAEHIS	Employment History Form	post an employment opportunity on the Web and verify that is it available for searching on the Web.
APAACTY	Activities Form	view activities by ID and current year.
AGAWPLG	Review External Pledges Form	review records stored in the Banner holding table.
APAWPRS	Review External Person Form	review records stored in the Banner holding table.

Form	Full Name	Use this Form to...
AGAWGIF	Review External Gifts Form	review records stored in the Banner holding table