UABANNER.EXE – University Advancement Reports
Last Update: January 18, 2013

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UABANNER.EXE: UA’s Client/Server Reports

Brief Description

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

Installing UABanner.EXE

If you have not run uabanner on your PC before, you will need to install the oracle drivers. To do this, If your network account is set up correctly, then the first step is to set your pc up for 3rd-party access to the Banner database.

Step 1 is to install the oracle client, click the run-advertised programs shortcut on your desktop:

Step 2 is to select and run the oracle client. The user who will run uabanner.exe must be the user who runs the oracle client installation.

(It installs per user rather than one install for all users on the pc)

Highlight the program and click run:
Next, right-click on the desktop and select “New” and then “Shortcut”

![Image showing desktop menu options]

Then, when you are prompted for the shortcut paste in the following:

```
\spartandrive\Departments\UNIVADVANCEMENT-33601\Custom\uab\uabanner.exe
```

Then click next to continue.
Finally, change the name or leave it as it is, then click: **finish**

If you pasted the correct information in the shortcut, it should pick up the image from the network location and look like this:
Reports that Run From Householded Populations

To run reports from householded selections, you may either look up available householded population selections via “Householded Table Counts” report under the university-advancement menu, then double-clicking on the popsel you want or you can click on “Householded Selection Reports” on the same menu and enter the parameters manually.
Next select an output format from the drop-down list and click “OK”

**APPLICATION:** Always Alumni for a University Advancement user.

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

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

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

**HOUSEHOLDER:** This is the username of the person who ran AZPHHLD to household the selection.
Standard Menu Options

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

Typical report menu items are described below:

Application Level:
- University Advancement: Items under this icon are either not specific to a department or were requested by the Vice Chancellor’s office.
- Advancement Services: Items under this icon are those requested by the Advancement Services office.
- Alumni Affairs: Items under this icon are those requested by the Alumni Affairs office.
- Annual Programs: Items under this icon are those requested by the Annual Programs Office.
- Development Office: Items under this icon are those requested by the Development Office.
- Spartan Club: Items under this icon are those requested by the Spartan Club Office.
- Sports Marketing: Items under this icon are those requested by the Sports Marketing Office.
- Tables: Items under this icon are reports listing codes and descriptions for Banner tables.
- Change the Default Printer
- Exit the application
Report Level:

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

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

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

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

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

Save As: Many reports in UABanner can be saved for use outside of the application, to use in excel or as a merge file for example. This option is indicated by the save as icon. Clicking this icon will bring up the save as window:
Choose a file type and be sure to select a file type with headers if you want column descriptions, especially in a merge file.

Exit the Report
User Defined Merge File

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

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

Preferred Address Type, County Code and Description: Redundant if you used preferred address, but the preferred address type will be the address type for the address the constituent prefers be used for mailing. (Home, Business, Seasonal, etc.) The county code as in “GUIL”, “Guilford”.

Other Address Type: User can select from other address types:
  - University Advancement: Auxillary/Secondary, Tracer, Seasonal,
  - Student Address Types: Permanent, Parent, Local, UNCG, etc.
  - Business Affairs Address Types: Vendor, Remit-To
  - HRS Address Types: Office, Permanent, etc.

Email Addresses: Preferred email address for constituent and spouse

Key Block: Internal ID, Population Selection Fields

Constituent Info: Preferred Class Year, Preferred School (College), Category (Friend, Alumni, Staff etc.)

Demographic Info: Birthdate, sex, citizenship, race, etc.

Confidential Flag and Exclusions: Confidential Flag = Y if constituent’s records are marked confidential. Exclusions field contains all exclusion codes for the constituent, if any (ALL – Do not Contact, AMS – Do Not Solicit by Mail, etc.)

All Donor Categories: Donor Categories, such as ‘Alumni’, ‘Faculty or Staff’, ‘Governing Board Member’, etc…
Click on the Tabs to see the various groups of field categories that can be included.

**Giving Summary Fields**

**SFC Giving Totals**: Total Received, Pledged, Memo and Planned for the Students First Campaign.

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

**Research Data**: As defined by the development office and found in Banner via prospect tracking fields.

**Strategy**: As defined by the development office and found in Banner via prospect tracking comments.

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

**Consecutive Years of Giving**: Self explanatory

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

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

**Spartan Club Totals**: Various Fiscal Year Totals, Recent Gifts, Life Total and Points
Activity and Membership Fields

Scholarships: Scholarships received by the constituent
All Degrees: Short description of all degrees, such as “BS BE ISOM 1993, MBA BE BUSI 1997”
All Degree years: Similar to All Degrees less Major
All Degrees (Spelled out Majors)
Athletic Scholarships: list of athletic scholarships awarded to the constituent
Awards: Awards Given to the constituent
Alumni Association Membership: Lifetime Membership Indicator
System: Flags to indicate if the person is in one or all of the following systems:
  Advancement, Student, Finance, HRS, and Accounts Receivable as well as date created and create user.
Sports: Sport Played by a former student athlete

Employment: name and address of employer. May be from id if the employer exists in the Advancement database or may be text. This may cause duplicate rows if a person has more than 1 active and primary employer
Current Employer/Position: (less detail about the individual employment record.)
Activity Count: Number of Activities associated with the constituent. (Student Activities, Alumni Events, Committee Memberships, etc.)

Military Service: Current or formal military service info for veterans

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

Leadership field options: These are for committees and events where the date and type of participation is tracked: President, Participant, Coach, etc. Dates for events or time periods for committee memberships can also be included. See the currently available activity types and categories below:

<table>
<thead>
<tr>
<th>Code</th>
<th>Activity Category</th>
<th>Code</th>
<th>Activity Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARC</td>
<td>Alumni Regional Club</td>
<td>ACAD</td>
<td>Academic Programs</td>
</tr>
<tr>
<td>BLKBK</td>
<td>Black Book</td>
<td>AAGRP</td>
<td>Alumni Association Group</td>
</tr>
<tr>
<td>CLUB</td>
<td>Club Sports</td>
<td>CAREE</td>
<td>Career Network</td>
</tr>
<tr>
<td>ATHLE</td>
<td>College Athletics</td>
<td>COMM</td>
<td>Committee</td>
</tr>
<tr>
<td>CPH</td>
<td>College Panhellenic</td>
<td>CONF</td>
<td>Conference</td>
</tr>
<tr>
<td>CULT</td>
<td>Cultural</td>
<td>GREEK</td>
<td>Greek Organization</td>
</tr>
<tr>
<td>GOV</td>
<td>Governance</td>
<td>MERIT</td>
<td>Merit Scholarship</td>
</tr>
<tr>
<td>HONSC</td>
<td>Honor Society</td>
<td>OTHR</td>
<td>Other</td>
</tr>
<tr>
<td>IFC</td>
<td>Interfraternity Conference</td>
<td>RECP</td>
<td>Reception</td>
</tr>
<tr>
<td>INTRA</td>
<td>Intramural</td>
<td>REUN</td>
<td>Reunion</td>
</tr>
<tr>
<td>LEARN</td>
<td>Learning Community</td>
<td>SEMN</td>
<td>Seminar</td>
</tr>
<tr>
<td>MEDIA</td>
<td>Media</td>
<td>SPECL</td>
<td>Special Interest Group</td>
</tr>
<tr>
<td>NPHC</td>
<td>National Pan-Hellenic Council</td>
<td>SPRTS</td>
<td>Sports</td>
</tr>
<tr>
<td>OTHR</td>
<td>Other, Misc.</td>
<td>TOUR</td>
<td>Tour</td>
</tr>
<tr>
<td>ART</td>
<td>Performing/Fine Arts</td>
<td>WKSH</td>
<td>Workshop</td>
</tr>
<tr>
<td>POLI</td>
<td>Political/Activist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROF</td>
<td>Professional</td>
<td></td>
<td></td>
</tr>
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<td>RELIG</td>
<td>Religious</td>
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</tr>
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<td>SCHLR</td>
<td>Scholarship</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SERVE</td>
<td>Service/Philanthropy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SFCCC</td>
<td>SFC Cap Campaign</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Giving Totals allow the user to include subtotals for giving that benefits a specified school, department or designation. Besides subtotals for the given date range, the user can also select summary fields for the gifts indicated by the categories: Life, fiscal or calendar year totals and number of years giving.
Annual Programs Reports

Annual Fund Reports:

- **Annual Fund Totals and Counts**

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

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

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

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

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

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

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

  Same as above but does not split solicitation totals by designation

- **Giving Total by Date Range, Sol Org, and Solicitation**

- **School Fund Report with Gifts and Pledges $15k**

  School Fund Report excluding major gifts

APG General Boards Report

**CampusCall**

- **Banner $4 to CampusCall Load file**

- **Banner 8.4 to CampusCall (reminder format)**

- **Banner 8.4 to CampusCall Student Load File**

  for loading student popsels into banner.

- **Calling Sheets from AWVHHLHLD**

  for calling from paper, primarily in use for when CampusCall is unavailable or volunteers are given calling sheets
Donor and Retained Donor Counts and Totals

Donor and Retained Donor Count by FY and Max Amt
Parameters: fiscal year one, fiscal year two, and max amount. Reports Number of donors in fiscal year provided, and number of donors in fiscal year provided who also gave in previous fiscal year. Donors’ gifts must be less than or equal to the maximum amount specified to qualify.

Donor and Retained Donor Count by FY and Max Amt (Alumni Only)
Same as about but donor must have an alumni-type donor category code (Alumni, Graduate Alumni or Alumni Spouse)

Donor Count and $Total by FY and Max Amount
Distinct number of donors giving a gift less than or equal to the maximum amount specified in the specified fiscal year. Sum of gifts less than or equal to the amount specified.

Donor Count and $Total by FY and Max Amount (Alumni Only)
Same as above, but donor must have an alumni type category code (Alumni, Graduate Alumni or Alumni Spouse)

Donor Count and $Total by FY and Max Amount (ALU or ALGR only)
Same as above, but donor must be an Alumni (does not include giving from alumni spouses)

Donor Count and $Total by FY and Max Amount (Primary Donor Cat)
Same as above but grouped by primary donor category (alumni spouse = friend)

Donor Count by Solicitor Org and Solicitation Selected by Date Range
Counts number of donors grouped by solicitation (gifts or payments)

Donor Count (Pledges) by Solicitor Org and Solicitation Selected by Date Range
Counts number of donors grouped by solicitation (pledges)

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

First Time Donor Report
Same as above, but not restricted by solicitation

First Time Donor Report - Grid, Gifts Only, PerGift
Same as above but in excel format
Donor and Retained Donor Counts and Totals (continued)

- **School Totals, Counts and New Donors by Solicitor Code**
  College Code, Number of Donors, Number of New Donors, $total where solicitor code = ‘AP’ and solicitation code = code specified

- **School Totals from AP/All Donors**
  Dollar Totals by School, designation type, and designation for date range specified (solicitor AP)

- **School Totals from AP/Undergrad Alumni**
  Same as above, but only includes totals if donor is Undergraduate Alumni

**Pledges**

- **Annual Programs: Pledge Aging Report**
  Pledge Aging report show all outstanding pledges with amounts due or past due, including amounts paid. Only pledges with pledge type = ‘TE’ and an amount outstanding are included.

- **Pledge Fulfillment Counts by Fiscal Year**
  Number of Pledges receiving payments in current and past fiscal years

- **Pledge Reminder by Pledge Date for 1 Payment Pledges**
  Selects based on supplied pledge-date range. Only includes pledges where installment amount due = pledge amount.

- **Pledge Reminder by Installment Date for Multiple Payment Pledges**
  Selects based on installment-due-date range. Does not include pledges where installment amount due = pledge amount.

- **Pledge Reminder (Last Chance Letter)**
  Selects based on payment due date.
Solicitations

**AF Solicited Due/Received Totals Unrestricted vs Restricted by Fiscal Yr**
Totals for unrestricted versus restricted designation amounts due and amounts received by fiscal year.

**AF Solicitation Gifts by Date Range**
List gifts solicited by AP solicitor org within the date range specified at run time, and with the solicitation codes specified at run time.

**AF Solicitor Org Gift Totals by Donor Coll. Code and Date**
Gift lists by donor preferred school and designation type, designation and date.

**AF Solicitor Org Type Special Purpose Crosstab**
Fiscal 2005 Gifts and Donor Counts by Solicitation Code where donors are in special purpose groups apg/ap052 – apg/ap056

**Other Solicitor Org AP UN AP EX Gifts**
Lists gifts to AP UN and AP EX where the solicitor is not AP.

**TEL Donor and Non-Donor Counts and $Totals**
Totals and Counts for gifts from previous donors and first time donors.

**TEL Monthly List by Fiscal Year**
Dollars received from solicitation “TEL” each month in a specified fiscal year.

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

**Director**

**Giving Total by Date Range, Scl Org, and Solicitation**
Subtotals by solicitation method.

**Gifts Payments Totals by Solicitation Code and FY and Max Amt**
Subtotals by solicitation, fiscal year, and maximum amount.

**Totals by Solicitation Code and FY and Max Amt**
Subtotals by solicitation, fiscal year, and maximum amount.
Development Office Reports

Campaign Reports

- **SPC1/SPC2 Total**
  - Displays received total for SFC1 & SFC2

- **SPC1/SPC2 Totals by School, Imperative and Designation**
  - Subtotals for campaign

- **SPC2 Planned Giving**
  - Subtotal for planned giving

- **Annual Campaign Reports**

- **Annual Campaign Reports (excluding pledge payments)**

- **SFC1/SPC2 Total**

- **SPC1/SPC2 Totals by School, Imperative and Designation**

- **SPC1 Gift and Pledge List by Imperative, School, Dept, etc.**
  - Gift and Pledge list that only pulls SFC1 gifts and has parameters for user to specify School, Dept, Imperative, data range, min amt, etc.

- **SPC2 Planned Giving**
  - Subtotal for planned giving

Development Report

- **Development Report Validation from AZSHHLD**
  - Lists members of a popsel along with any honorary giving links

- **Development Report Names List from AZSHHLD**
  - Lists names, class years, deceased indicator and sort name for couples in a householded population selection

- **Donor Count by Class Year for Specified Calendar Year**
  - Standard demographic counts grouped by preferred class year, with giving totals calculated only on the user-supplied calendar year

- **Donor Counts and Membership Counts by School**
  - Same as above but by school

- **Gift Society Lists**
UABANNER.EXE – University Advancement Reports

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

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

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

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

Unbroken Band List
Same as gift-society lists, but does not household

Unbroken Band List - Invitation (Group by Couple, add Spouse)
Same as gift-society lists, but household

Unbroken Band List by Minimum Activity Date
Same as above but looks at activity date on the gift-club record to all user to select recent additions

Gift Totals

Department Totals Name List
Select names and totals by designation department

Department Totals Name List including amounts due

Department Totals Name List w/o Designation Detail

Designation Most Recent Gift Date Reports
Select donors by most-recent gift to a specified designation

Designation Totals Name List
Select names and totals by designation

Designation Totals Name List (Include Memo Credit)

Designation Totals Name-Only List by Level (1 col)

Designation Totals Name-Only List by Level

Donor Counts by Category within Fiscal Year

Donor Counts by Fiscal Year with Category
UABANNER.EXE – University Advancement Reports

$ Gift Totals by Pledge Calendar Year from Date Range
used to break down pledge-payments received by year of pledge

Gift Totals by Pledge Calendar Year, Type from Date Range
used to break down pledge-payments received by year of pledge

$ Gift Totals by Pledge Fiscal Year from Date Range
used to break down pledge-payments received by year of pledge

Gift Totals by Pledge Fiscal Year, Type from Date Range
used to break down pledge-payments received by year of pledge

Library

Designation Most Recent Gift Date Reports excluding Jackson Society

Jackson Society List (Current and Past Calendar Year $1,000+)

Jackson Society List (by minimum Calendar Yr)

Quarterly Totals - Library

Quarterly Totals - Weatherspoon

School (College) Totals Names List
Select names and totals by designation school

$ Subtotals by Entity Type within Date Range
totals by donor type as in Alumni vs Faculty vs Friends etc.

Gift Subtotals for College by Entity Type within Date Range
totals by donor type as in Alumni vs Faculty vs Friends etc.

$ Subtotal Payments by Fiscal Year and Type for Pledges w/in range
Subtotals for pledge types
Gift/Pledge/Payment/Match Lists

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

Output format allows you to select one of the following output formats:
- Donor Count – Count of Distinct Donors for qualifying gifts (as opposed to a count of gifts)
- Gift and Pledge List – All Gifts and Pledges that qualify are listed with donor name and address
- Gift and Pledge List with Phone Numbers – All Gifts and Pledges that qualify are listed with donor name, address and phone number
- Gift and Pledge Totals Only – totals by designation
- Gift Lists – Gifts Only
- Memory and Honor Repeating List – (lists gifts and pledges to specified designations within specified dates if Honor or Memory records are also associated with the transactions. Transactions are duplicated if the
transaction is in honor or memory of more than one person. No totals are included. This list is for creating a honor/memory info spreadsheet with a separate record for each person honored or memorialized.

Pledges Only

Gift/Pledge/Payment/Match Lists (Continued)

$ Gift and Pledge List (continued)

☑ Exclude Planned Giving

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

☐ sql preview

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

Maximum Date of Record 11/18/2006

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

All other parameters are ignored if no value is specified.

Insert Row

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

Matching Gift Company List from Record Date Range (exportable)
used to get lists of companies who made matching gifts

Matching Gift List by Matched Donor
Lists matching gifts selected by the donor whose gift was matched

Matching Gift List by MG Company from Record Date Range
used to review matching gifts received during specified time period

Matching Gift List by MG Company, Date and CollCode
used to review matching gifts received during specified time period for a specified matching gift company, date and college code

Memory/Honor Gifts by Person Honored
List all gifts made in honor or memory of specified person

Memory/Honor Gifts and Pledges by Person Honored
List all gifts and pledges made in honor or memory of specified person

Pledge Aging Report by Coll Code
standard pledge aging report for a specified school

Pledge Aging Report with Primary Constituent Code
standard pledge aging report with extra columns
UABANNER.EXE – University Advancement Reports

Preferred Class Donor and Nondonor List
Reunion giving report.

PrefClass Totals Specified Cal Yr
Reunion giving report.

Prospect Tracking Reports

Bio By Name with Dynamic Report List
summary of any constituent’s biographical, activity, giving, and prospect tracking data

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

![Image of a dynamic report interface]

Step 2: Double-click on a name to select
Step 3: Select Reports to be included

![Image of a report selection interface]
Prospect Tracking Reports (continued)

- Complete Giving History by Name
- Complete Giving History by Name Cross Reference
- Gift List Spreadsheet by Name
- Gift List Spreadsheet by Name from 3rd Parties
- Maintenance
  - Incorrect ID: Code
  - Missing Move Code
  - Multiple "A" ratings
  - X Rating Code

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

Move Summary for All Staff

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

Moves Summary with Call Reports

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

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

Pipeline User-Defined Merge File

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

Prospect Call Report (Rich Text Version)
Contact report by contact-start-date, staff initials, and id (rich text allows cutting and pasting of the data)

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

**Solicitation Activity by Date Range**

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

**Staff Review of Other Contacts**
follow-up moves added to prospect tracking system for a specific staff member, listed in follow-up date order
Tables (Code Translations)
All Banner Codes tables can be retrieved via “Banner Codes Tables”, reports that list more than code and description are listed individually:

- Activity Codes (STVACTC)
  Activity Code, Description, Type, Group

- Activity Counts and Last Update

- Banner Codes Tables (Code and Description)
  Displays name and description of all codes tables available to the user and allows the user to create a report only any of these tables by clicking on the table name in the list displayed.

- Banner Codes Tables (All Fields)

- Banner Table or View Descriptions

Designation Reports

- Active Designations: Code, Name and Long Name

- Campaign Designation List by School and Imperative
  Lists Designations by Students-First-Campaign Imperatives and college

- Campaign Designation List by Imperative First Character

- Campaign Designation List by School, Department and Imperative (Tree)

- Designation Codes
  Complete list of fields associated with each designation

- Designation Codes without FOAP
  Designations without FOAP codes.

- Designation Comments Report
  Designation list with all associated comments.

- Designations without Associated ID’s

- Designations without Associated ID’s by Type

- Designations without Financial Aid Fund Codes

- FOAP with School Code and Description
UABANNER.EXE – University Advancement Reports

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

Special Purpose Counts
Gives special purpose record counts grouped by special purpose type and code.

Printer Setup
Allows you to specify which printer you want to print the reports.
Filtering Reports

Example 1: Filtering designation list for Gift Reports

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

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

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

“=” looks for an exact match

“Like” looks for a value containing the string. %’s are interpreted as “any character” by oracle when using a like statement. Designation_name like ‘%Scholarship%’ will pull any designation where the word ‘Scholarship’ is at the beginning, at the end or anywhere within the designation name.
In the example above, you would get all designations where the college_code is equal to ‘BE’ and ‘Scholarship’ is anywhere within the name:

<table>
<thead>
<tr>
<th>Date</th>
<th>Designation List</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/5/2006</td>
<td>Adbdesg Name</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Designation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALLENC UN</td>
<td>Charles Burchette Allen Scholarship Endowment</td>
</tr>
<tr>
<td>Type: ENSCH - Endowment Scholarship/Fellowship</td>
<td>Active</td>
</tr>
<tr>
<td>School/Dept: BE - School of Business &amp; Economics/</td>
<td>BAD - Business Adm</td>
</tr>
<tr>
<td>Restriction: 1 - Need</td>
<td></td>
</tr>
<tr>
<td>Use: Stewardship Use Scholarship</td>
<td></td>
</tr>
<tr>
<td>FCAP: G 3100356001 385101 170</td>
<td></td>
</tr>
<tr>
<td>ALLEN RJ UN</td>
<td>Roscoe J. and Anna Mae Burchette Allen Scholarship Endowment</td>
</tr>
<tr>
<td>Type: ENSCH - Endowment Scholarship/Fellowship</td>
<td>Active</td>
</tr>
<tr>
<td>School/Dept: BE - School of Business &amp; Economics/</td>
<td>BAE - Bryan School</td>
</tr>
<tr>
<td>Restriction: 1 - Need</td>
<td></td>
</tr>
<tr>
<td>Use: Stewardship Use Scholarship</td>
<td></td>
</tr>
<tr>
<td>FCAP: G 3113656001 385101 170</td>
<td></td>
</tr>
<tr>
<td>BANKAMR EX</td>
<td>Bank of America Scholarship Endowment</td>
</tr>
<tr>
<td>Type: ENSCH - Endowment Scholarship/Fellowship</td>
<td>Active</td>
</tr>
</tbody>
</table>