HELPFUL HINTS for Uploading Third-Party Prospect Prospect Ratings

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May 14, 2015
SESSION RULES OF ETIQUETTE

- Please turn off your cell phone/beeper
- If you must leave the session early, please do so as discretely as possible
- Please avoid side conversation during the presentation

Thank you for your cooperation!
AGENDA

- Why prospect ratings?
- About our most recent upload
- Uploading third-party prospect ratings
- Final Thoughts
- Questions
- Presenter information
WHY PROSPECT RATINGS?

- Limited time and resources
- Greater competition for dollars
- New harder-to-identify wealth

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**WHY PROSPECT RATINGS?**

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% Dollars Raised

90% 10%

Major Gift Donors

Top Annual Fund Donors

All Other Donors

THE DONOR PYRAMID

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WHY PROSPECT RATINGS?

END GOAL

FOCUS EFFORTS ON DONORS WHO WILL LIKELY GIVE THE MOST MONEY
WHY PROSPECT RATINGS?

PROSPECT RATING:

A descriptive measure of a potential donor’s ability and likelihood to give at a certain level.
WHY PROSPECT RATINGS?

IMPLEMENTING PROSPECT RATINGS:

- Do it yourself
- Third-party service
ABOUT OUR MOST RECENT UPLOAD

- A very simple example:
  - We sent an extract to Donor Search.
  - They sent back ratings.
  - We uploaded only the ratings.

- Good example with which to illustrate some helpful hints.
UPLOADING RATINGS

1. Receive or generate load file
2. Prepare Banner for load
3. Verify data source set up
4. Load the data
5. Test the load
6. Update custom reports

We did our upload following these six steps.

This presentation will focus on these first four steps.
1. **Make the Load File**

<table>
<thead>
<tr>
<th>DS Rating</th>
<th>Overall</th>
<th>Profile</th>
<th>RFM Total</th>
<th>Last Gift Date</th>
<th>Total Gift Amount</th>
<th># of Gifts</th>
<th>First</th>
<th>M</th>
<th>Last</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>DS1-5</td>
<td>21.3</td>
<td>Profile</td>
<td>199</td>
<td>11/17/199</td>
<td>$75</td>
<td>1</td>
<td>Noah</td>
<td>V</td>
<td>Smith</td>
<td>3536</td>
</tr>
<tr>
<td>DS1-5</td>
<td>15.5</td>
<td>Profile</td>
<td>0</td>
<td>$0</td>
<td>0</td>
<td>0</td>
<td>Sophia</td>
<td>J</td>
<td>Johnson</td>
<td>2129</td>
</tr>
<tr>
<td>DS1-5</td>
<td>19.4</td>
<td>Profile</td>
<td>249</td>
<td>02/20/201</td>
<td>$325</td>
<td>5</td>
<td>Liam</td>
<td>J</td>
<td>Williams</td>
<td>4840</td>
</tr>
<tr>
<td>DS1-5</td>
<td>14.9</td>
<td>Profile</td>
<td>284</td>
<td>12/01/201</td>
<td>$1,825</td>
<td>39</td>
<td>Emma</td>
<td>Y</td>
<td>Jones</td>
<td>5839</td>
</tr>
<tr>
<td>DS1-5</td>
<td>15.3</td>
<td>Profile</td>
<td>0</td>
<td>$0</td>
<td>0</td>
<td>0</td>
<td>Jacob</td>
<td>B</td>
<td>Brown</td>
<td>SAVAC</td>
</tr>
<tr>
<td>DS1-2</td>
<td>15.5</td>
<td>Profile</td>
<td>0</td>
<td>$0</td>
<td>0</td>
<td>0</td>
<td>Olivia</td>
<td>Z</td>
<td>Davis</td>
<td>26119</td>
</tr>
<tr>
<td>DS1-1</td>
<td>20</td>
<td>Profile</td>
<td>273</td>
<td>08/29/201</td>
<td>$620</td>
<td>115</td>
<td>Mason</td>
<td>U</td>
<td>Miller</td>
<td>5842</td>
</tr>
</tbody>
</table>

**Totals Table**
1. **Make the Load File**

A **piece of data**

Typical Delimited Text File

**DELIMITER**
1. **Make the Load File**

**HINT #1:** Banner uses delimiters at end of each record.

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**Typical Delimited Text File**

```
Data_L1_C1,Data_L1_C2,Data_L1_C3, ... Data_L1_Cn
Data_L2_C1,Data_L2_C2,Data_L2_C3, ... Data_L2_Cn
Data_L3_C1,Data_L3_C2,Data_L3_C3, ... Data_L3_Cn
...
Data_Ln_C1,Data_Ln_C2,Data_Ln_C3, ... Data_Ln_Cn
```
1. Make the Load File

**HEADER**

```
HEADING_1,HEADING_2,HEADING_3, ... HEADING_n,
Data_L2_C1,Data_L2_C2,Data_L2_C3, ... Data_L2_Cn,
Data_L3_C1,Data_L3_C2,Data_L3_C3, ... Data_L3_Cn,

Data_Ln_C1,Data_Ln_C2,Data_Ln_C3, ... Data_Ln_Cn,
```

Typical Delimited Text File
1. **MAKE THE LOAD FILE**

- Check: Delimiter - *Comma*
- Uncheck: Data
- Uncheck: Header
1. **MAKE THE LOAD FILE**

**HINT #2:** Begin with the end in mind.²

1. *Know how you want to rate prospects*
2. *Know where you are putting the ratings*
3. *Know the constraints for the data*

---

1. **MAKE THE LOAD FILE**

**HOW WE Rated PROSPECTS**

- Donor Search DS Rating
- Overall Rating
- RFM
- Annual Fund
- Major Giving
- Planned Giving
1. **MAKE THE LOAD FILE**

WHERE WE PUT THE RATINGS: **AMREXRT**

<table>
<thead>
<tr>
<th>Col. No.</th>
<th>Column</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>amrexrt_pidm</td>
<td>number(8,0)</td>
</tr>
<tr>
<td>2</td>
<td>amrexrt_exrs_code</td>
<td>varchar2(5 char)</td>
</tr>
<tr>
<td>3</td>
<td>amrexrt_ext_value</td>
<td>varchar2(4 char)</td>
</tr>
<tr>
<td>4</td>
<td>amrexrt_ext_score</td>
<td>varchar2(4 char)</td>
</tr>
<tr>
<td>5</td>
<td>amrexrt_ext_level</td>
<td>varchar2(4 char)</td>
</tr>
<tr>
<td>6</td>
<td>amrexrt_activity_date</td>
<td>date</td>
</tr>
<tr>
<td>7</td>
<td>amrexrt_surrogate_id</td>
<td>number(19,0)</td>
</tr>
<tr>
<td>8</td>
<td>amrexrt_version</td>
<td>number(19,0)</td>
</tr>
<tr>
<td>9</td>
<td>amrexrt_user_id</td>
<td>varchar2(30 char)</td>
</tr>
<tr>
<td>10</td>
<td>amrexrt_data_origin</td>
<td>varchar2(30 char)</td>
</tr>
<tr>
<td>11</td>
<td>amrexrt_vpdi_code</td>
<td>varchar2(6 char)</td>
</tr>
</tbody>
</table>
1. **MAKE THE LOAD FILE**

**WHERE WE PUT THE RATINGS:** AMREXRT

<table>
<thead>
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<td>date</td>
</tr>
<tr>
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<td>number(19,0)</td>
</tr>
<tr>
<td>8</td>
<td>amrexrt_version</td>
<td>number(19,0)</td>
</tr>
<tr>
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</tr>
<tr>
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<td>amrexrt_data_origin</td>
<td>varchar2(30 char)</td>
</tr>
<tr>
<td>11</td>
<td>amrexrt_vpdi_code</td>
<td>varchar2(6 char)</td>
</tr>
</tbody>
</table>

**HINT #3:** Include PIDM in the data extract sent to third-party service.
1. **MAKE THE LOAD FILE**

**CONSTRAINTS:**

<table>
<thead>
<tr>
<th>Col. No.</th>
<th>Column</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>amrexrt_pidm</td>
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<td>amrexrt_exrs_code</td>
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</tr>
<tr>
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<td>4</td>
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<td>varchar2(4 char)</td>
</tr>
<tr>
<td>5</td>
<td>amrexrt_ext_level</td>
<td>varchar2(4 char)</td>
</tr>
<tr>
<td>6</td>
<td>amrexrt_activity_date</td>
<td>date</td>
</tr>
<tr>
<td>7</td>
<td>amrexrt_surrogate_id</td>
<td>number(19,0)</td>
</tr>
<tr>
<td>8</td>
<td>amrexrt_version</td>
<td>number(19,0)</td>
</tr>
<tr>
<td>9</td>
<td>amrexrt_user_id</td>
<td>varchar2(30 char)</td>
</tr>
<tr>
<td>10</td>
<td>amrexrt_data_origin</td>
<td>varchar2(30 char)</td>
</tr>
<tr>
<td>11</td>
<td>amrexrt_vpdi_code</td>
<td>varchar2(6 char)</td>
</tr>
</tbody>
</table>

Rating codes can only be 5 characters long.

Actual scores can only be 4 characters long.
## 1. Make the Load File

<table>
<thead>
<tr>
<th>RATING</th>
<th>CODE</th>
<th>SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor Search DS Rating</td>
<td>DS_15</td>
<td>DS1-1, DS1-2, ...</td>
</tr>
<tr>
<td>Overall Rating</td>
<td>OVL15</td>
<td>0 - 25</td>
</tr>
<tr>
<td>RFM</td>
<td>RFM15</td>
<td>0 - 300</td>
</tr>
<tr>
<td>Annual Fund</td>
<td>AF_15</td>
<td>0 - 300</td>
</tr>
<tr>
<td>Major Giving</td>
<td>MG_15</td>
<td>0 - 300</td>
</tr>
<tr>
<td>Planned Giving</td>
<td>PGI15</td>
<td>1 - 7</td>
</tr>
</tbody>
</table>
### 1. Make the Load File

<table>
<thead>
<tr>
<th>RATING</th>
<th>CODE</th>
<th>SCORE</th>
</tr>
</thead>
</table>
| Donor Search DS Rating          | DS_15  | DS11, DS12, ...
| Overall Rating                  | OVL15  | 0 - 25    |
| RFM                             | RFM15  | 0 - 300   |
| Annual Fund                     | AF_15  | 0 - 300   |
| Major Giving                    | MG_15  | 0 - 300   |
| Planned Giving                  | PGI15  | 1 - 7     |

Changed the scores to be no more than 4 characters.
1. **MAKE THE LOAD FILE**

- [x] Delimiter
- [x] Data
- [ ] Header
1. **MAKE THE LOAD FILE**

**HINT #4:**
Banner delivers field names for headers in Table ATVTPFD. There is likely no need to add your own.
1. **Make the Load File**

![Diagram showing field names and descriptions]

- **PIDM**
- **Rating Code**
- **Score**
1. **MAKE THE LOAD FILE**

**HINT #5:**
Entire listing can be found in Banner Advancement Data Load/Extract Handbook.
1. **MAKE THE LOAD FILE**

- Delimiter
- Data
- Header
1. **Make the Load File**

Our CSV File

```csv
BAN_PIDM,EXT_RATE_SOURCE,EXTERNAL_SCORE,
1,AF_15,276,
1,DS_15,DS15,
1,ME_15,38,
1,OVL15,22,
1,RFM15,115,
2,AF_15,300,
2,DS_15,DS11,
2,ME_15,268,
2,OVL15,20,
2,PGII15,1,
2,RFM15,280,
3,AF_15,300,
3,DS_15,DS11,
3,ME_15,300,
3,OVL15,20,
3,PGII15,1,
3,RFM15,287,
4,AF_15,201,
4,DS_15,DS30,
4,ME_15,38,
4,OVL15,13.5,
4,RFM15,99,
5,AF_15,300,
5,DS_15,DS15,
```
1. **MAKE THE LOAD FILE**

**HINT #6:**
Ask your third-party service to provide the file in the CSV format needed.
2. **Prepare Banner for the Load**

- Data Source
- Ext. Ratings Source
- Data File
- Data Field Names
- Data Field Positions
2. Prepare Banner for the Load

Data Source

- **Table:** ATVDSRC
- **Values:** Donor Search Upload 2015 (DSLOAD15)
2. Prepare Banner for the Load

Data Source

Get to these validation forms using Go To...
2. Prepare Banner for the Load

Data Source
2. **Prepare Banner for the Load**

- [x] Data Source
- [ ] Ext. Ratings Source
- [ ] Data File
- [ ] Data Field Names
- [ ] Data Field Positions
2. Prepare Banner for the Load

External Ratings Source

**Table:** ATVEXRS

**Values:**
- DS_15 DS Rating
- OVL15 Overall
- RFM15 RFM
- AF_15 Annual Fund
- MG_15 Major Gift
- PGI15 Planned Giving
2. Prepare Banner for the Load

External Ratings Source
2. Prepare Banner for the Load

External Ratings Source

HINT #7: These descriptions will be visible to Advancement SSB users.
2. **Prepare Banner for the Load**

- [x] Data Source
- [x] Ext. Ratings Source
- [ ] Data File
- [ ] Data Field Names
- [ ] Data Field Positions
2. Prepare Banner for the Load

Data File

- **Table:** ATVTAPE
- **Values:**
  - **File Code:** DSLOAD15
  - **Process:** APPCUPD
  - **Delimiter:** ,
  - **Marker:** (none)
2. **Prepare Banner for the Load Data File**
2. Prepare Banner for the Load

- Data Source
- Ext. Ratings Source
- Data File
- Data Field Names
- Data Field Positions
2. Prepare Banner for the Load

Data Field Names

- Table: ATVTPFD
- Values: BAN_PIDM
  - EXT_RATE_SOURCE
  - EXTERNAL_SCORE

Note: These are the three field names we discussed earlier.
2. Prepare Banner for the Load

Data Field Names

Should already be in this table. Part of delivered Banner. Just need to confirm these field names already exist.
2. **Prepare Banner for the Load**

- [x] Data Source
- [x] Ext. Ratings Source
- [x] Data File
- [x] Data Field Names
- [ ] Data Field Positions
2. Prepare Banner for the Load Data Field Positions

- **Table:** AGATPFD
- **Values:**

![CSV File Screen Capture]

1. BAN_PIDM
2. EXT_RATE_SOURCE
3. EXTERNAL_SCORE
2. **Prepare Banner for the Load**

**Data Field Positions**

- **Table:** AGATPFD
- **Values:**
  - BAN_PIDM 1
  - EXT_RATE_SOURCE 2
  - EXTERNAL_SCORE 3
2. Prepare Banner for the Load

Data Field Positions

- **File Code**: DSLOAD15
- **File Process**: APPCUPD
- **Record Number**: 01
- **Field Name**: BAN_PIDM
  - Field Number: 1
  - Occurrence: 1
  - Activity Date: 14-MAY-2015
- **Field Name**: EXT_RATE_SOURCE
  - Field Number: 2
  - Occurrence: 1
  - Activity Date: 14-MAY-2015
- **Field Name**: EXTERNAL_SCORE
  - Field Number: 3
  - Occurrence: 1
  - Activity Date: 14-MAY-2015
2. **Prepare Banner for the Load**

- □ Data Source
- □ Ext. Ratings Source
- □ Data File
- □ Data Field Names
- □ Data Field Positions
3. **Verify Data Source Setup**

- Use Procedure **APPDFLS** (File Definition Verification List)
- Lets you ...
  - Verify your file definition
  - Preview how the data will be loaded
  - Avoid flying blind

**HINT #8:**
APPDFLS does not actually validate the data against the various tables.
3. **Verify Data Source Setup**

Get to these jobs using **Go To**...
3. **VERIFY DATA SOURCE SETUP**

- **DATABASE**
  - File Code: 01
  - Path of Data File - Part 1: J:\David\Import_File_DSLOAD2015_Rev1.csv
  - Data File Name: Import_File_DSLOAD2015_Rev1.csv
  - Data Source Identifier: DSLOAD15
  - Start Record Number: 102986
  - End Record Number: Y
  - Header Record Exists: N
  - Path of Data File - Part 2

*<Ctrl><PgDn>* and enter DATABASE as printer so that you can get to the output files.

*<Ctrl><PgDn>* and enter parameters

*<Ctrl><PgDn>* to get to Submission block.

*Click Save to submit the job*
3. **Verify Data Source Setup**

The APPDFLS Output File
4. **Load the Data**

- Use Procedure **APPCUPD** (Directory Load)
4. **Load the Data**

![Screenshot of Oracle Fusion Middleware Forms Services: Open > GJAPCTL with Process Submission Controls GJAPCTL form]

**Printer Control**
- **Printer:** DATABASE
- **Special Print:**
- **Lines:**
- **Submit Time:**

**Parameter Values**

<table>
<thead>
<tr>
<th>Number</th>
<th>Parameters</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>File Code</td>
<td>DSLOAD15</td>
</tr>
<tr>
<td>02</td>
<td>Path of Data File - Part 1</td>
<td>J:\David\Import_File_DSLOAD2015_Rev1.csv</td>
</tr>
<tr>
<td>03</td>
<td>Data File Name</td>
<td>Import_File_DSLOAD2015_Rev1.csv</td>
</tr>
<tr>
<td>04</td>
<td>Data Source Identifier</td>
<td>DSLOAD15</td>
</tr>
<tr>
<td>05</td>
<td>Address Type</td>
<td></td>
</tr>
<tr>
<td>06</td>
<td>Phone Type</td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>Fax Number Type</td>
<td></td>
</tr>
<tr>
<td>08</td>
<td>E-mail Type</td>
<td></td>
</tr>
</tbody>
</table>

**Submission**

- **Save Parameter Set as**
- **Name:**
- **Description:**
- **Hold**
- **Submit**
**Final Thoughts**

- Simple example.
- APPCUPD can do a lot more.
- Can run APPCUPD in report mode first.
- More complex loads may also put some data in temporary tables.
  - Gives opportunity to review and verify data.
  - Then finish loading into permanent tables.
Final Thoughts

Hint #9: Banner Advancement Data Load/Extract Handbook is a good resource.
THANK YOU! QUESTIONS?
PRESENTER INFORMATION

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