

Advance Web Release Notes

September 2010

Release 9.5.1.0



SUNGARD HIGHER EDUCATION

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September 2010	New version that supports Advance 9.5.1.0.
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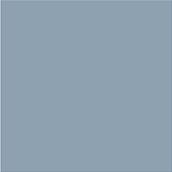


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Executive Summary



As part of SunGard Higher Education's ongoing effort to continuously improve the quality of products, services and processes, Advance Web 9.5.1.0 introduces new functionality, as described below.

Support for Microsoft Server 2008 64-bit and IIS7

Effective with this release, support for the Web Server running Advance Web is expanded to Microsoft Server 2008 64-bit and IIS7.

Transaction Lookups using receipt or pledge number

This new text-only field is used for gifts, pledges, and matching gifts and displays on the Gift - Transaction Lookup template with a label of 'Specific Receipt/Pledge Number'. The system looks for a receipt/pledge number based on the type of transaction(s) indicated by the check boxes (Gift / Matching Gift / Pledge) checked at the top of the form. If the receipt/pledge number exists for the transaction, any other criteria entered in the lookup form will be ignored.

Gift Club modifications

In this release, a 3-character TMS validated column, Gift Club Type, is now available via the Gift Clubs table to add more detail to gift clubs. This field also displays on the Gift - Gift Club Membership Lookup template. When performing a Gift Club Lookup from the Lookups Page Tree, the new field also displays.

The `tms_gift_club_family` view is available for `club_family_code`. `club_family_code`, `club_family_upgrade`, and `club_family_downgrade` are available in the `tms_gift_club_table` view to allow TMS maintenance.

Task Credit Type classification

In this release of Advance, the TMS table `tms_task_credit_type` provides the ability to classify tasks into general categories. This TMS table is used for site-specific reporting and does not display in any windows other than the TMS view.

Control overpayment of pledges

A new system option allows you to indicate whether you want validation to occur when pledge overpayments are entered and what type of validation will occur. Options include a warning message that allows the user to proceed and a warning message that forces the user to enter an amount that does not exceed the balance on the pledge.

Giving Summary Report Totals

Two new fields, “Paid to Date” and “Balance Due”, are included in the display of Giving Summary Pledge/Payment reports. When viewing Pledge/Payment reports, you can now see how much of a pledge has been paid as of the current date, in addition to the remaining balance.

Payment Schedule Discounts and Reversals

New functionality allows for the entry and viewing of primary pledge discounted payment information. Discounted amounts can also be viewed in the Payment Schedules window via the Batch Entry Ledger, as well as Online Pledge Maintenance.

It is important to note that Advance will not calculate the values in these fields since this is not an automatic process; they must be manually maintained in the Batch Payment Schedule or Online Payment Schedule Maintenance window, which now display maintainable “Discounted Amt” and “Discounted Bal” columns.

Installation overview

The following chart describes the supported Advance upgrade paths. If you have any questions, please contact customersupport@sungardhe.com prior to beginning the upgrade or installation.

Current Version	Upgrade Instructions
Advance Web or Windows 9.5.0.0	Upgrade directly to Advance Web 9.5.1.0
Advance Web 9.5.0.1	Upgrade directly to Advance Web 9.5.1.0
Advance Web or Windows 9.4.x.x or earlier	Upgrade to Advance Web 9.5.0.0, then upgrade to Advance Web 9.5.1.0.
No version of Advance installed.	Perform a new database installation of Advance Web 9.5.0.0, then upgrade to Advance Web 9.5.1.0.

Please refer to the following installation document for additional information:

- [Advance_Web_Installation_Instructions.pdf](#)

For compatibility and support information, please refer to the section of this document entitled Support on Page 23.

Key

On occasion where we wish to bring additional information to your attention, the text is preceded by one of the following icons:

	The information icon symbolizes a more detailed explanation of a feature or term is available.
	The technical icon symbolizes information that may be of interest to those technically inclined, but has no impact on end-users.
	The watch out icon symbolizes the potential for doing something which may adversely affect your system.



New Features and Functionality



Advance Web 9.5.1.0 introduces new features and functionality, as described below.

Support for Microsoft Server 2008 64-bit and IIS7

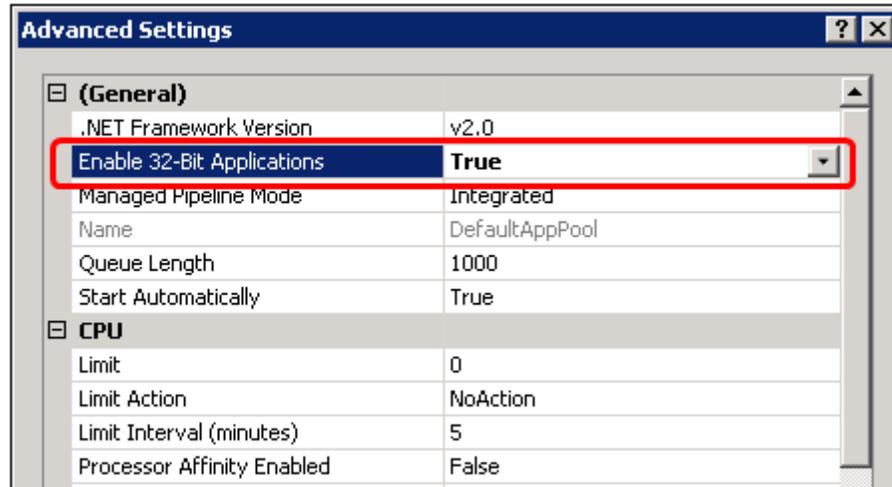
Effective with Advance Web 9.5.1.0, support for the Web Server running Advance Web is expanded to Microsoft Server 2008 64-bit and IIS7.

In regard to this feature, please note the following:

- The Advance Configuration Utility runs in 32-bit mode on both 32-bit and 64-bit servers. This means a 32-bit Oracle client is required. Due to the complications of installing 32-bit and 64-bit Oracle clients side-by-side, SunGard Higher Education does not recommend using the Advance Configuration Utility on a 64-bit server.
- For institutions and organizations licensed for ADM with ApplicationXtender and BDMS, please note ApplicationXtender is not supported in 64-bit mode because EMC does not provide a runtime for 64-bit environments. This means, you must run Advance Web in 32-bit mode if you wish to use ADM with ApplicationXtender and BDMS.
- For institutions and organizations using Crystal Reports (DLL viewer or Crystal Server) integrated with Advance Web, please note Crystal Reports is not supported in 64-bit mode because SAP does not provide a runtime for 64-bit environments. This means if you are using integrated Crystal Reports on a 64-bit server, you must run Advance Web in 32-bit mode.
- For institutions and organizations using PowerBuilder/InfoMaker reports, please note these reports are not supported in 64-bit mode. This means if you are using these reports on a 64-bit server, you must run Advance Web in 32-bit mode.
- For additional information on database support for Oracle® Client, Oracle® Server and ODAC, please refer to page 23.

To run Advance Web in 32-bit mode:

1. Open Internet Information Services (IIS) Manager.
2. In the tree on the left, select Application Pools.
3. When the list of Application Pools appears, select the App Pool used by Advance Web (typically DefaultAppPool).
4. Right-click the App Pool and select Advanced Settings.
5. In the General Section select Enable 32-bit Applications and set the value to True.



6. Click OK.

Transaction Lookups using receipt or pledge number

Effective with Advance Web 9.5.1.0, a field is available on the Transaction Lookup for a receipt number or pledge number.

The screenshot shows the ADVANCE web application interface. At the top, the user is logged in as 'qatestweb9510 [Logoff]'. The main navigation bar includes 'Home' and 'Lookups - Gift - Transaction'. The left sidebar lists various categories under 'Lookups', with 'Gift' selected. The main content area is titled 'Lookups' and contains a form with the following steps:

1. Choose a template (optional): Gift - Transaction
2. Select results format*: Giving Transactions Lookup List
3. Select output type*: Display results/Open on exact match
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Buttons for 'View Criteria', 'Clear', and 'Search' are present. Below the steps is the 'Transaction Lookup' section, which includes a 'Help' link and a refresh icon. The form contains several fields with dropdown menus and checkboxes:

- Gift Matching Gift Pledge
- Specific Receipt/Pledge Number**: A dropdown menu with an equals sign (=) and a text input field. This field is highlighted with a red box.
- Allocation**: A dropdown menu with an equals sign (=) and a text input field.
- Allocation School**: A dropdown menu with an equals sign (=), a dropdown menu with '(All)', and a text input field.
- Appeal**: A dropdown menu with an equals sign (=) and a text input field.

This new text-only field is used for gifts, pledges, and matching gifts and displays on the Gift - Transaction Lookup template with a label of 'Specific Receipt/Pledge Number'. The system looks for a receipt/pledge number based on the type of transaction(s) indicated by the check boxes (Gift / Matching Gift / Pledge) checked at the top of the form. If the receipt/pledge number exists for the transaction, any other criteria entered in the lookup form will be ignored.

No change was made to the Advanced Lookups, as these columns were previously available.

Gift Club Type entry for Gift Clubs and new TMS views

In this release a 3-character TMS column, Gift Club Type, is now available via the Gift Clubs table in order to allow you to add more detail to gift clubs. The values in this column display as a drop-down list in the Type field and are validated against tms_gift_club_type (06).

i All view and database changes described in this section were first introduced to the Advance database with Advance Windows in a previous release. Thus, changes in this section are not new to the Advance database, but are new from an end-user perspective in Advance Web 9.5.1.0.

Entity

- Overview
- Detail
- Biographic
- Events
- Giving
 - Views
 - Appeals 1
 - Documents
 - Gift Clubs** 1
 - Segments
- Membership
- Prospect Tracking
- Ticketing
- Alerts
- Messages
- Add Person
- Add Organization
- Entity Update
- Ack Helper
- Deceased Entity
- Entity Merge
- View Updates

Gift Clubs Actions Print

Mr. Chad Carver #100689 Do Not Phone
Rec Type Alumnus Alumna (1975 Art and Science)
Degree BS 1975 Art and Science
Prim Affil Board of Trustees (Current) *****ATTENTION*****
Married: # Mrs. Samantha Carver #100690

Gift Clubs (1/1) Save New Actions Help

Club	Status	School	Start	Stop
Century Club	Active	Art and Science	08/11/1999	12/31/2000

Club* CC Century Club Unit
Status* A Active Joint
Type
School AS Art and Science Start 8 / 11 / 1999
Authorized AFO Annual Fund Office Stop 12 / 31 / 2000
Partner ID 100690 # Mrs. Samantha Carver
Reason
Comment

The Type field also displays when Print Form is selected from the Gift Clubs form, as well as on the Entity Profile Report Gift Club form.

Type now displays just below Status on the Gift - Gift Club Membership Lookup template. When performing a Gift Club Lookup from the Lookups Page Tree, the new field also displays.

Lookups

Saved Criteria...

- ▶ Biographic
- ▶ Event
- ▶ Gift
- ▶ Prospect Tracking
- ▶ Membership
- ▶ Resource
- ▶ Miscellaneous

Add Person

Add Organization

Entity Update

View Updates

Lookups Actions

1. Choose a template (optional) Gift - Gift Club Membership
2. Select results format* Gift Club Memb Lookup List
3. Select output type* Display results/Open on exact match
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Gift Club Membership Lookup Help

Club	=		(All)		
Status	=		(All)		
Type	=				
School	=		(All)		
Unit	=		(All)		
Assigned	=		(All)		
Start	>=		/		/
Stop	<=		/		/
Joint	=		(All)		

The view tms_gift_club_family is now available in Advance Web for club_family_code.

TMS Edit Code Table

TMS Edit Code Table

TMS Edit Code Table Actions

TMS Code Definition Gift Club Family (tms_gift_club_family)

TMS Codes (1/3) Save New Actions Help

Gift Club Family Code	Short Desc
GO	Gold
PL	Platinum
SI	Silver

Gift Club Family Code*

Short Desc*

Full Desc

Owner Usergroup

Active

Hierarchy Order

Use for AWC

Comment

Very Short Desc

Sort Name

Added Operator

Club_family_code, club_family_upgrade, and club_family_downgrade are available in the tms_gift_club_table view, which allows maintenance in TMSC. These columns are validated against club_code.

TMS Edit Code Table

TMS Edit Code Table

TMS Edit Code Table Actions

TMS Code Definition Gift Club Table (tms_gift_club_table)

TMS Codes (1/4) Save New Actions Help

Club Code	Club Desc
CC	Century Club
HS	Heritage Society
LC	Leadership Circle
PC	President's Club

Club Code*

Club Desc

Active

Club Family Code

Club Family Upgrade

Club Family Downgrade

Hierarchy Order

Owner Usergroup

Added Operator

Unit Code

Task Credit Type classification

In this release of Advance, the TMS table `tms_task_credit_type` (UT) provides the ability to classify tasks into general categories. This TMS table is used for site-specific reporting and does not display in any windows other than the TMS view.

i All view and database changes described in this section were first introduced to the Advance database with Advance Windows in a previous release. Thus, changes in this section are not new to the Advance database, but are new from an end-user perspective in Advance Web 9.5.1.0.

The screenshot displays the 'TMS Edit Code Table' interface. At the top, there is a header bar with 'TMS Edit Code Table' and 'Actions'. Below this, a sub-header reads 'TMS Code Definition Task Credit Type (tms_task_credit_type)'. A secondary bar indicates 'TMS Codes (1/2)' with 'Save New Actions Help' options. The main table has two columns: 'Task Credit Type Code' and 'Short Desc'. It contains two rows: 'C1' with 'Credit Type 1' and 'C2' with 'Credit Type 2'. Below the table is a detailed form for editing a code. The form fields are: 'Task Credit Type Code*' (text box with 'C1'), 'Short Desc*' (text box with 'Credit Type 1'), 'Full Desc' (empty text box), 'Owner Usergroup' (dropdown menu with 'CO' selected and 'SGHE' visible), 'Active' (checked checkbox), 'Hierarchy Order' (text box with '0'), 'Use for AWC' (unchecked checkbox), 'Comment' (text box with a scroll bar), 'Very Short Desc' (empty text box), 'Sort Name' (text box with 'CREDIT TYPE 1'), and 'Added Operator' (text box with 'qatestadv9510').

Task Credit Type Code	Short Desc
C1	Credit Type 1
C2	Credit Type 2

Task Credit Type Code*	<input type="text" value="C1"/>
Short Desc*	<input type="text" value="Credit Type 1"/>
Full Desc	<input type="text"/>
Owner Usergroup	<input type="text" value="CO"/> <input type="button" value="v"/> SGHE
	<input checked="" type="checkbox"/> Active
Hierarchy Order	<input type="text" value="0"/>
	<input type="checkbox"/> Use for AWC
Comment	<input type="text"/>
Very Short Desc	<input type="text"/>
Sort Name	<input type="text" value="CREDIT TYPE 1"/>
Added Operator	<input type="text" value="qatestadv9510"/>

After codes are entered via the Task Credit Type TMS view, the classifications can be associated with a task, via the tms_task view, which contains a drop-down list (Task Credit Type) that validates against the tms_task_credit_type table.

TMS Edit Code Table Actions

TMS Code Definition Task (tms_task)

TMS Edit Code Table Save New Actions Help

TMS Codes (1/3)

Task Code	Short Desc
COR	Correspondence
TEL	Telephone call
VST	Visit

Task Code*

Short Desc*

Full Desc

Context Code Entity Prospect Program Prospect Proposal Allocation
 Committee Contract/Grant Event

Task Credit Type

Owner Usergroup

Active

Control overpayments of pledges

In previous versions, you could enter a pledge payment that was greater than the amount of the outstanding balance on the pledge. In this release, system option 258 controls pledge overpayments.

System Option #258

Pledge Overpayment Control

The setting of this system option indicates whether the entry of an overpayment for a pledge will be allowed or will generate a warning or error.

- ◆ 0 If set to 0, no amount validation occurs and overpayments are not checked.
- 1 If set to 1, validation of the pledge payment entered occurs and a warning message displays when the amount exceeds the outstanding balance of the pledge. You may choose to ignore the warning and continue saving the pledge payment, or you may change the pledge payment amount.



- 2 If set to 2, validation of the pledge payment entered occurs and an error displays when the amount exceeds the outstanding balance of the pledge. The correct pledge payment amount, i.e., less than the outstanding balance of the pledge, must be entered before the transaction can be saved. This validation also occurs with GiftLoader transactions.



i *The overpayment validation is performed when:*

- *A user adds a pledge and payment to that pledge in the same batch.*
- *A user enters multiple payments against a processed pledge in the same batch.*
- *A user modifies a pledge payment to exceed the pledge balance*
- *A user modifies a pledge's balance in an unprocessed batch (closed or opened) and makes a modification to the pledge's payment amounts in another batch, and the payment exceeds the pledge balance*

However, it is not checked for multiple pledge payments to a processed pledge in multiple unprocessed batches. The overpayment logic is only checked on the initial Add; other modifications will be checked in the validation batch report.

Giving summary report totals

In this release, two new fields, Paid to Date and Balance Due, are included in the display of Giving Summary Pledge/Payment reports. With these new fields, you can see how much of a pledge has been paid as of the current date as well as the remaining balance. These new fields are available on the following reports:

- Pledges/Payments
- Pledges/Payments with Audit
- Pledges/Payments with Corp Totals
- Pledges/Payments with Corp Totals/Audit
- Pledges/Payments with Spouse
- Pledges/Payments with Spouse/Audit

Pledges/Payments (1/15)			Actions	Help
Pledge #: 0000105451	Date: Sep 13, 2010	Paid to date: 0.00	Balance Due: Open-Ended	
Legal: 0.00	Year: 2010	Allocation: Annual Fund		
Credit: 0.00				
No Payments				
Date:	Receipt#:	Class:		
Legal:	Type:	School:		
Credit:	Allocation:	Campaign:		
Pledge #: 0000105470	Date: Aug 15, 2010	Paid to date: 700.00	Balance Due: 500.00	
Legal: 1,200.00	Year: 2010	Allocation: Annual Fund		
Credit: 1,200.00				
Payment				
Date: Aug 15, 2010	Receipt#: 0000105474	Class: 1975		
Legal: 700.00	Type: Check/Cash (Primary)	School: College of Arts and Sciences		
Credit: 700.00	Allocation: Annual Fund	Campaign:		
Pledge #: 0000105529	Date: Jun 12, 2010	Paid to date: 0.00	Balance Due: Open-Ended	
Legal: 0.00	Year: 2010	Allocation: Annual Fund		
Credit: 0.00				
No Payments				
Date:	Receipt#:	Class:		
Legal:	Type:	School:		
Credit:	Allocation:	Campaign:		



- The Paid to Date field is populated from `primary_pledge.prim_pledge_amount_paid`.
- The Balance Due field is populated by subtracting the `primary_pledge.prim_pledge_amount_paid` from the `primary_pledge.prim_pledge_amount`. If this value is negative, a zero displays.
- For open-ended EFT and Payroll Deduction pledges, the Balance Due field displays the text Open-Ended. This refers to pledges with a Payment Frequency = 0 from `tms_pledge_type`.

Payment schedule discounts and reversals

In this release, functionality allows for the entry and viewing of primary pledge discounted payment information.

After you enter a new pledge with a discounted amount, and you access the Scheduled Payments form, the discounted amount appears in the Pledge Summary header form. In the Scheduled Payments form below new editable 'Discounted Amount' and 'Discounted Balances' fields allow you to maintain these values and modify the amounts as necessary. A new system option allows for the display of warning if the discounted amount entered during pledge entry does not agree with the total of the amounts entered in the new editable discounted columns.

System Option #129

Gift Payment Schedules: Sum of the discount amount must be equal to the primary pledge discount amount.

The setting of this system option indicates whether the primary pledge discounted amount must equal the amount on the Payments Schedules form.

- 0 If set to 0, no validation of the amounts occurs.
- 1 If set to 1, validation of the amounts occurs and a warning displays if they are not equal. The amounts do not need to match in order to close and process the batch and this is simply meant as a warning.
- 2 If set to 2, validation of the amounts occurs and an error displays if they are not equal. Correct amounts must be entered before proceeding. If you proceed and the amounts do not match, you will receive a validation error when you attempt to close the batch.

To enter discounted amounts for a pledge transaction:

1. During pledge entry, enter the Primary Pledge Discounted Amount in the 'Discount' field.

The screenshot shows the 'Pledge Details' form with the following fields and values:

Donor*	100690	Mrs. Samantha Carver (#92 ~95 !98 B07)
Allocation*	ANNUAL FUND	Annual Fund
Pledge Type*	ST	Straight Pledge
Amount*	100000.00	
Frequency*	A	Annual # Yrs 5
Pay Amt	20000	
Record*	07/19/2010	
<input type="checkbox"/> Binding	<input type="checkbox"/> Recordable	
Pay Date	7/19/2010	
Pledge Status	A	Active
Ant Match	0.00	
Soft Credit	100000	
Discount	98470.00	

2. Click Save. If system option 129 is set to 1 or 2, you will receive a message indicating the total discounted amount for all the schedules does not equal the primary discount amount. This

message is meant to serve as a reminder to access the Scheduled Payments form and enter the amounts, as necessary.



3. Click the Scheduled Payments hyperlink to display the Scheduled Payments form.
4. Enter the appropriate discount information in the 'Discounted Amount' and 'Discounted Balance' fields. Advance does not calculate these values; they must be maintained manually.

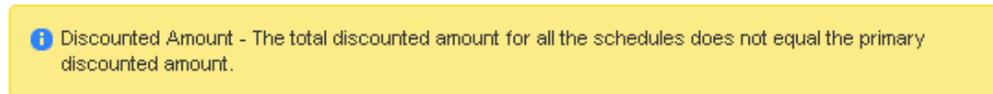
Pledge Summary

Primary Donor Mrs. Samantha Carver #100690 (#92 ~95 198 B07) [Associated Donors \(1\)](#)
Pledge Entry [Scheduled Payments \(5\)](#)
Pledge # 106108 [Pledge Details](#)
Record Date Jul 19, 2010 **Trans Type** Straight Pledge [Premiums \(0\)](#)
Legal Amt 100,000.00 **Frequency** Annual [Documents \(0\)](#)
Discounted Amt 98,470.00
Allocation [Annual Fund](#)

Scheduled Payments (5) Save Cancel Actions Help

Date	Status	Amount	Balance	Discounted Amount	Discounted Balance
7 / 19 / 2010	Unpaid	20,000.00	20,000.00	19,988.00	19,988.00
7 / 19 / 2011	Unpaid	20,000.00	20,000.00	19,850.00	19,850.00
7 / 19 / 2012	Unpaid	20,000.00	20,000.00	19,725.00	19,725.00
7 / 19 / 2013	Unpaid	20,000.00	20,000.00	19,632.00	19,632.00
7 / 19 / 2014	Unpaid	20,000.00	20,000.00	19,275.00	19,275.00
Totals:		100,000.00	100,000.00	98,470.00	98,470.00
Paid to date:		0.00			

5. Click Save. If the sum of the discounted amount payments does not equal the primary pledge discounted, and System Option #129 is set to a value other than '0', a message indicating the amounts do not match will display when you save the transaction.



- When system option 129 = 1, this message serves as a warning and you can proceed even if the amounts are not equal.
- When system option 129 = 2, the amounts must be changed before proceeding. Failure to correct the amounts will yield a validation error when you attempt to close the batch

6. Continue to enter transactions or close the batch when finished.

When discounted amounts are available for primary pledges, they may be viewed with the payment schedules. To view Primary Pledge Discounted Amounts, navigate to the pledge you wish to view and open the Payments form. The Payment Schedules form displays the 'Discounted Amt' and 'Discounted Bal' columns. A reversed pledge's payment schedule can be viewed in the Payment Schedules Reversal form.

Payment-related institution-defined fields

Advance Web 9.5.0.0 introduced functionality that allowed you to enable new institution-defined payment-related fields on credit card-specific Tender Detail forms, which allowed you to capture site-specific data to meet the needs of your institutional policies and procedures. Since these new fields were considered institution-specific, the fields and their applicable labels were not visible by default and required enabling prior to use.

Effective with Advance Web 9.5.1.0, this functionality is expanded to include these fields on all Tender Detail forms, with the exception of the EFT Pledge detail form.

i When enabled, institution-defined fields appear on the applicable forms (including reversal and modification forms).

i If you use GiftLoader to populate values in these fields, please be certain you enable the fields for display. Failure to do so will result in data not appearing on the applicable forms.

Gift Batch – Tender Details

ADVANCE nflanders [Logoff]

Home x Gift Batch List x Gift x

Gift Batch

Gift Batch Control
Transaction List 1
Batch Proof Report
Validation Report
New Gift
New Pledge
New Matching Gift
New Reversal
New Modification
Batch List

Gift Actions

Gift Batch #	101437 (Open)	Add Date	12/10/2009	Mod Date	12/10/2009
User Group	SGHE	Operator	nflanders		

Gifts	Pledges	Matching Gifts	Reversals	Modifications
1	0	0	0	0

Gift Summary ↻

Primary Donor	# Mr. Jeff O'Neil #4001 (#)	Associated Donors (2)	
Receipt #	105471	Gift Details	
Record Date	12/10/2009	Trans Type	Gift
Legal Amt	100.00	Pmt Type	Credit Card
Allocation	Annual Fund		Premiums (0)
			Documents (0)

Tender Details Actions Help ↻

Amt	100	Cover	
Tender	Credit Card		
NPV	0.00		
Memo		Deduction	0
Type*	V Visa		
Fee	0.00		
Comment			
Auth Trans Numb	XY-2745330-1		
Card Auth Code	4297		
Auth Date Time	12/10/2009		
Card Auth Source			
IDF Alphanum1			
IDF Alphanum2			
IDF Date			
IDF Number	0		

IDF Alphanum1	This text field allows you to enter site-specific information. A maximum of 120 characters can be entered in this field.
IDF Alphanum2	This text field allows you to enter site-specific information. A maximum of 120 characters can be entered in this field.
IDF Date	This date field allows you to enter the date to which the institution-defined field information applies.
IDF Number	This number field allows you to enter a number to which the institution-defined field information applies. A maximum of 10 digits can be entered in this field.

 *No database changes were made in order to support this new functionality, as these fields were added to the Advance database in version 9.5.0.0.*

 *As with other user-defined fields, the Gift Mass Modification Utility does not take these fields into consideration.*

Enabling the institution-defined fields

By default, these institution defined fields on the Tender Detail forms are not visible. These fields and their corresponding labels must be enabled through the Advance Configuration Utility, as follows:

1. Log into the Advance Configuration Utility.
2. From the Main Menu, select Web → Web Admin → Forms.
3. When prompted, select the Profile to which the changes will apply.
4. Scroll through the list and select the first form whose fields you wish to enable. The form IDs of the forms are as follows:
 - A. 80598 (Batch Tender Type – Cash/Check)
 - B. 80600 (Batch Tender Type – Foreign Currency)
 - C. 80601 (Batch Tender Type – Gift In Kind)
 - D. 80602 (Batch Tender Type – Insurance)
 - E. 80603 (Batch Tender Type – Securities)
 - F. 90250 (Tender Type – Cash/Check)
 - G. 90252 (Tender Type – Foreign Currency)
 - H. 90253 (Tender Type – Gift In Kind)
 - I. 90254 (Tender Type – Insurance)
 - J. 90255 (Tender Type – Securities)
 - K. 90378 (Tender Type – Cash/Check)
 - L. 90380 (Tender Type – Foreign Currency)
 - M. 90381 (Tender Type – Gift In Kind)
 - N. 90382 (Tender Type – Insurance)
 - O. 90383 (Tender Type – Securities)
5. Select the Form Controls Tab when the details of the selected form appear on the right.

6. For forms 80598, 80600, 80601, 80602, 80603, 90378, 90380, 90381, 90382 and 90383, modify the following attributes. Be certain you Save your changes after modifying each form control:

Control Name	Attribute	Current Value	New Value
misc_detail1_t	Type	Hidden Text Box	Label
misc_detail1	Hidden	Checked	Unchecked
misc_detail2_t	Type	Hidden Text Box	Label
misc_detail2	Hidden	Checked	Unchecked
misc_date1_t	Type	Hidden Text Box	Label
misc_date1	Hidden	Checked	Unchecked
misc_float1_t	Type	Hidden Text Box	Label
misc_float1	Hidden	Checked	Unchecked

7. For form 90250, 90252, 90253, 90254 and 90255, modify the following attributes. Be certain you Save your changes after modifying each form control:

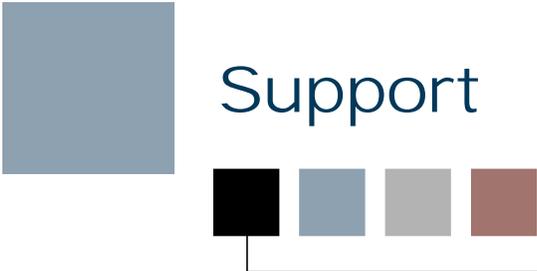
Control Name	Attribute	Current Value	New Value
misc_detail1_t	Type	Hidden Text Box	Label
misc_detail1	Type	Hidden Text Box	Label
misc_detail2_t	Type	Hidden Text Box	Label
misc_detail2	Type	Hidden Text Box	Label
misc_date1_t	Type	Hidden Text Box	Label
misc_date1	Type	Hidden Text Box	Date Label
misc_float1_t	Type	Hidden Text Box	Label
misc_float1	Type	Hidden Text Box	Label

i When all configurations are complete, each form control modified as part of this procedure will appear with an asterisk to the left of the control name, to indicate it was modified at the specified profile.

8. Optionally, change the Labels on each field by modifying the value in the Data field. The form controls that contain the Labels all contain the suffix “_t.” Repeat this step for each form for which you enabled these fields.
9. Save your changes.
10. Purge the cache on the Web Server.

i In addition to modifying the attributes listed on the previous page, you can also change either or both the Control Type of misc_detail1 or misc_detail2 to Dataentry Select to make the field validate against a valid TMS view. If you perform this action, make sure you enter the two-character TMS Code in the Base Table field and set the Display Col to 1.





Support

The following non-SunGard Higher Education platforms and operating environments were tested against, and are supported for use with, Advance Web 9.5.1.0.

Browsers

- Internet Explorer® 7 (7.0.5730.13)
- Internet Explorer 8 (8.0.7600.16385) on Windows 7
- Internet Explorer 8 (8.0.6001.18702) on XP
- Internet Explorer 8 (8.0.6001.18928) on 2008 Server
- Firefox 3.6.8

Client operating systems

- Windows XP Professional, SP2
- Windows Vista Enterprise
-  *Microsoft no longer supports Internet Explorer 7 with Windows Vista. Please refer to [Microsoft's website](#) for additional information.*
- Mac OS X 10.4.11

Database

- Oracle Server - Oracle 11g (11.1.0.6.0)
- Oracle Server - Oracle 10g (10.2.0.4.0)
- Oracle Client 11g win32 (11.1.0.7) for Microsoft Windows Server 2008 win32
- Oracle Client 11g x64 (11.1.0.7.0) for Microsoft Windows Server 2008 x64
- ODAC 10.2.0.2.21 (10g win32 and WoW64)
- ODAC 10.2.0.3 (10g x64)

 *WoW64 stands for Windows 32-bit on Windows 64-bit.*

 *If you are on 11g, you should use the full client instead of the ODAC*

Web server

- Windows Server 2008 Enterprise with IIS7 on 32-bit hardware platform
- Windows Server 2008 Enterprise with IIS7 on 64-bit hardware platform in 32-bit mode
- Windows Server 2008 Enterprise with IIS7 on 64-bit hardware platform in 64-bit mode
- Microsoft .NET Framework v3.5

Mobile device

- Blackberry Curve 8300 Series
- Blackberry Curve 8900 Series
- Palm Treo® 750

Online help

- Adobe® RoboHelp® 8.0.2.208

Application development

- Sybase® PowerBuilder Enterprise 11.5, Build 2506 (for use with Advance Configuration Utility)
- Microsoft® Visual Studio® 2008 SP1 (for Advance Web)

Other

- Crystal Reports Server 2008 (32-bit only)
- Crystal Reports Viewer (XI, R2 or 2008) (32-bit only)
- Pubcookie 3.1.0
- LDAP Version 3.0 Compliant
- MKS® 9.1.0100 (32-bit only)
- Microsoft Office 2003, 2007*
- Microsoft Exchange 2007
- Freedom Scientific JAWS® 8.0.1177
- Experian QAS Pro Web 5.64 plus QAS for Advance 9.3 v1.0 integration files
- Grenzebach Glier and Associates DonorScape March 2008
- Quick Scan Pro 4.6.0 (optional - 32-bit only)
- iModules Encompass
- Active Directory MS Server 2008
- SunGard Bi-Tech IFAS 7.9 w/Patch
- SunGard EXP MACESS 2.71 SP4, 3.3
- EMC Documentum ApplicationXtender 5.40.322 (32-bit only)
 - Server components: ApplicationXtender Desktop, License Server, Rendering Server,

Web Access

- Client machine components: ApplicationXtender Desktop

*ApplicationXtender does not support documents saved in Microsoft Office 2007 format; it does support documents saved in earlier formats, e.g., Microsoft Office 2003 via lowest common denominator approach.

ⓘ *Kerberos authentication is no longer supported, effective with the release of Advance Web 9.5.0.0.*





Compatibility



The following SunGard Higher Education applications were tested with, and are compatible with, Advance Web 9.5.1.0.

Advance Windows

- Version 9.5.1.0

Advance Web Community (AWC)

- AWC is not compatible with Advance Web 9.5.1.0

Advance Configuration Utility

- Version 9.5.1.0

Events

- Version 4.0 (with the applicable required hot fixes)

SmartCall

- Version 9.5 (with the applicable required hot fixes)
- Version 9.6 (with the applicable required hot fixes)

SmartCall Integration Utility (SIU)

- Version 3.5

Data Movement

- Version 5.1

Site Help Integration Utility

- Version 2.0

Advance Loader (AdvLoader)

- Version 9.5.1.0

Advance Export (AdvExport)

- Version 9.5.1.0

Job Scheduler

- Version 3.0

Banner Student

- Versions 8.3 and 8.4



System-wide Changes



Database scripts & database changes

There are no database changes in Advance Web 9.5.1.0.

TMS views

This release does not contain any new or modified TMS views. All view changes described in this document were first introduced to the Advance database with Advance Windows in a previous release. Thus, TMS view changes described in this document are not new to the Advance database, but are new from an end-user perspective.





System Options



This release does not contain any new or modified system options. All system option changes described in this document were first introduced to the Advance database with Advance Windows in a previous release. Thus, system option changes described in this document are not new to the Advance database, but are new from an end-user perspective.



Defect Fixes



The following table contains a brief description of each defect resolved since the release of Advance Web 9.5.0.1, including the corresponding subsystem or general areas to which each defect applies and the corresponding log number used to track the defect.

Defect #: 11362 **Synopsis:** Web Form alignment **Description:** The framework will read the column width metadata but the metadata column size needs to add up to 532 px the size of the max form width specified in the web.config file. (I think we deliver it as 532 – or something close to that). If it does not add up to 532 then the framework decides the “best fit” divided across the number columns in the X position and any additions to the form appearance through form_options. This is what makes the alignment behave so strangely. I think what complicates the issue is that when we were first entering all the metadata we were entering a 1px for column values so that the framework used it’s best fit logic to reduce the amount of time it would take for us to format the forms. As these are the examples clients have to look at, we should point this out in documentation to reduce confusion.

Defect #: 11576 **Synopsis:** Clipboard default **Description:** When you navigate to the clipboard from a program prospect lookuup list the clipbaord still defaults to the ENTITY clipboard. Clients requests that the type of lookup result determine the type of clipboard that opens by default.

Defect #: 12822 **Synopsis:** Control type documentation **Description:** Can we please create a document that describes the different Control Types that can be used in AWA? It would also be helpful if we could provide some examples as to when a client would use one control type over another to achieve certain desired results. Several clients have asked about this documentation

Defect #: 14445 **Synopsis:** Provide end user documentation for use of tokens, controls in config **Description:** Would like to see documentation on what tokens can be used in forms and what they do. Would also like documentation on the various control types and how they can be used when adding forms. Also, Class - what are the available options to use in the ""class"" field on the control maintenance. Form Option values - how they control the ""look and feel"" of the form such as scroll bars, sortable columns, etc.

Defect #: 1-609OHU **Synopsis:** Unique constraint error adding a joint gift club where both id numbers do not have the same number of rows **Description:** When adding a joint gift club, the sequence number for both rows must be the same sequence number. However, if the two id numbers have a differernt number of rows, the user can get a unique constraint error as it assigns a sequence number to the joint row that already exists for the joint id number.

Defect #: 1-6696NX **Synopsis:** Address data not updated on employer name **Description:** When employment data is linked to a business address and the name of the organization changes, the address data is supposed to be updated automatically with the new organization name. This is not occurring.

Defect #: 1-7FEUXM **Synopsis:** User must click on back twice when on address when using FireFox **Description:** Seems to be specific to the address application and FireFox. When using back, the user must click twice on back before anything happens. Not a problem in IE.

Defect #: 1-7FMHUO **Synopsis:** Error on page if helpful text hyperlink used to navigate to address
Description: If the user is on the entity detail and clicks on the address hyperlink in the helpful text to go to address, when they attempt to save the address, they get an error on page. Error is object expected page id 50002, app id 80004 selected note sequence =16, action.aspx treestate =11.

Defect #: 1-82W0TQ **Synopsis:** Allocation stewardee does not allow for a relationship code of 3 characters
Description: The allocation stewardee relationship tms table is defined as a length of 3 and the relationship column in the allocation stewardee table is also a length of 3. However, when the user tried to use a tms code that is 3 characters, they get a message telling them that the code can only be two characters. Note that a code of 3 characters can be entered into the same column in Advance Windows.

Defect #: 1-804OZV **Synopsis:** Length of columns not enforced for birth place or death place
Description: The length of birth place is 36 and the length of death place is 30 but the user is not restricted to those lengths. If they enter in more than 36 or 30 characters, then they get the error has occurred message with the value too large for column. The lengths should be restricted by the form so that the user does not input more than 36, 30 characters.

Defect #: 1-AM75LF **Synopsis:** Get error trying to do gift club lookup with stop date
Description: When trying to do a gift lookup from the template drop down, if the user enters in a value for the stop date, they get a message - a problem exists with your search request - this query cannot be processed.

Defect #: 1-AVMDIW **Synopsis:** Object reference not set to an instance of an object error when accessing goals in Agent Hierarchy
Description: When the user expands the campaign agent hierarchy to the agent level, they should be able to click on the class agent to see the goals. However, when the user does that the application crashes with an object reference not set to an instance of an object error message. Entire error message is attached.

Defect #: 1-AWI4HD **Synopsis:** Navigation Guide mentions being able to use F12 to copy to clipboard
Description: F12 has not yet been implemented in Advance Web so the reference to being able to use F12 in the navigation guide needs to be removed.

Defect #: 1-AXD1EG **Synopsis:** Gift Club Lookup ignores start and stop dates in sql syntax
Description: When doing a gift club lookup and entering data for the start and stop dates, when the user does a view criteria, the dates are in the list. However, in checking the sql syntax, the dates are not in the sql syntax and so the lookup returns the wrong data.

Defect #: 1-B4OCOQ **Synopsis:** Former name row not created after Org name change with SO 91 enabled
Description: After making a name change to an organization, a former name row is not created in Advance Web 9.4 like it does in Windows.

Defect #: 1-B5J1FF **Synopsis:** Changing data does not refresh in membership ledger after saving change
Description: User is renewing or re-instating a membership. They enter in the membership number and the information from the existing membership defaults into the ledger. The user saves the new membership. After saving, they realize they need to change something such as appeal code or campaign. They make the change and save. At first the change appears to be there but then the application refreshes and the changed data no longer displays. Note that the changes are written out to the batch tables but it appears to the data entry person as if their changes have not been saved and so they continue to try to make and save those changes to the membership.

Defect #: 1-B5UNXC **Synopsis:** Selecting lookup on an expired session yields error rather than login form
Description: If you logon to Advance Web, then let your session idle until the timeout period has passed, if you click on the Lookup menu item, you will get the error below instead of being re-directed back to the logon page.

Defect #: 1-BHCBPS **Synopsis:** Buttons Misaligned using Firefox
Description: In the Lookup Results page in Advance Web, the "New Search" and "Refine Search" buttons are jammed together with no white space between them when viewed in FireFox 3.6.

Defect #: 1-BJW3VJ **Synopsis:** Marrying two entities with preferred phone but not home does not reset preferred phone indicator **Description:** Marrying two entities where one has the preferred phone set on non-home address and other entity has preferred phone on home address results in two preferred phone rows for entity with non-home preferred phone. Note that this bug results in an error when trying to access the entity overview for the entity with two preferred phone address rows.

Defect #: 1-BM5KCI **Synopsis:** Entity Merge requires the Year or Month be populated in order to move an entity appeal **Description:** Even though year and month are not required columns when adding an entity appeal, the entity merge utility will not allow an appeal to be merged unless a Year or Month is in the appeal row. If the Year and Month are both missing, the checkbox is not enabled for the appeal even though the TO entity has no appeal data at all.

Defect #: 1-BNQQ61 **Synopsis:** AWA 9.3 Allowing Inactive Users to Login w/ LDAP **Description:** In Advance Web 9.3, users that are authenticated using LDAP can still log in when they are set to inactive. Also confirmed in Advance Web 9.4.

Defect #: 1-BP97WF **Synopsis:** Question mark instead of apostrophe in batch control for transaction count **Description:** On batch control, when system option 194 is set to 1 or 2 and system option 193 is turned on, the label for the transaction count contains a question mark instead of an apostrophe (Calc?d Transaction Count). Form 80038 has the ? right in the text.

Defect #: 1-BT1R9S **Synopsis:** ADM Performance issue **Description:** The same performance issue that was just resolved for Windows in 932 and 94 also exists in Web 932 and above. Showing the list of documents in all contexts can be slow, even if the id has no documents. The query that is dynamically constructed is flawed in that there are two function calls that are getting evaluated for all document ids, not just the docs for the id or context. This is true regardless of whether option 316 is 0, 1, or 2. The fix needs to be in adv_dm.adv_w09051, similar to the one made in adv_w09051w for windows.

Defect #: 1-BUF3II **Synopsis:** Changing the initial payment date on a membership with a premium procedure a critical error message **Description:** If the user has processed a membership with a premium and then does a membership modification and changes the initial payment date and sets the status to P, the application produces a critical error message: unique constraint (AWA932.MEMB_BATCH_PREMIUM_KEY0) violated.

Defect #: 1-BXT9T6 **Synopsis:** PB prompts not working in Advance Web **Description:** All PB prompts for datawindow (PB) reports are not being recognized in Advance Web. The stored procedure will run, however no values are being passed to it from the webform control and the stored procedure will never return any data. Same report works fine in Advance Windows. Clients should not have to manipulate the configuration of report to work in both places.

Defect #: 1-BZFV6G **Synopsis:** Site Specific Data Validation Does Not Work **Description:** Site specific data validation in AWA 9.4 does not work. This is when a custom data validation routine is added in the Config Utility in the Data Transaction Window, which adds a transaction name into the validate_cmd_id column in the appropriate row in zz_mt_data_clump. When it does not work, it may generate the error "Object reference not set to an instance of an object." otherwise there will be no error at all.

Defect #: 1-C3XB09 **Synopsis:** Warning message related to allocation department has wrong choices **Description:** If the user changes the allocation department such that the new value is not the same as the value in the allocation, they get a message asking if they want to keep their changes or bring in the values from the allocation - however, the message says to choose Yes to change value, No to keep current value. However, the choices are OK and Cancel.

Defect #: 1-C927W2 **Synopsis:** Error Using LDAP Authentication **Description:** When a user is authenticated in Advance Web using LDAP, a bind and query must be performed to test the user's credentials. The query is used to test that the bind was successful and that the user has entered a valid user name and password. However, the query is too broad, and can potentially return thousands of rows when it really only needs to return one row. Some LDAP systems may have a restriction on the number of rows a query can return, causing the query to fail (and preventing the user from logging on) even though the user name and password were entered correctly and the bind was successful. The query needs to be changed so it only searches for the user itself (returning only a maximum of one row) instead of searching on the entire subtree that the user is in.

Defect #: 1-CB5AI4 **Synopsis:** Bio user guide and tms docs need to be updated with tms county logic **Description:** In Advance Web, only the county codes that are associated with the state code that is embedded in the tms county table will show up in the drop down. This is different than Advance Windows where all of the codes will show in the drop down. In addition, the zip city table needs to have both the state code and the county code in order for the county code to default into the address when the zip code is entered.

Defect #: 1-CLIMJ5 **Synopsis:** GiftLoader documentation needs to be updated for changes in zz_gpl_transaction **Description:** New columns were added to zz_gpl_transaction but the documentation was not updated to include these changes.

Defect #: 1-CVBEZS **Synopsis:** Get error trying to modify matching gift that only contains one matched gift **Description:** If the user is trying to do a gift modification and the gift has been matched, the application will attempt to bring both the gift and the matching gift into the ledger as a modification. However, the user is getting an error - bm-check-amount - the gift amount may not exceed check amount. Seems to be related to only having one match gift for the check number, mg_number.

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