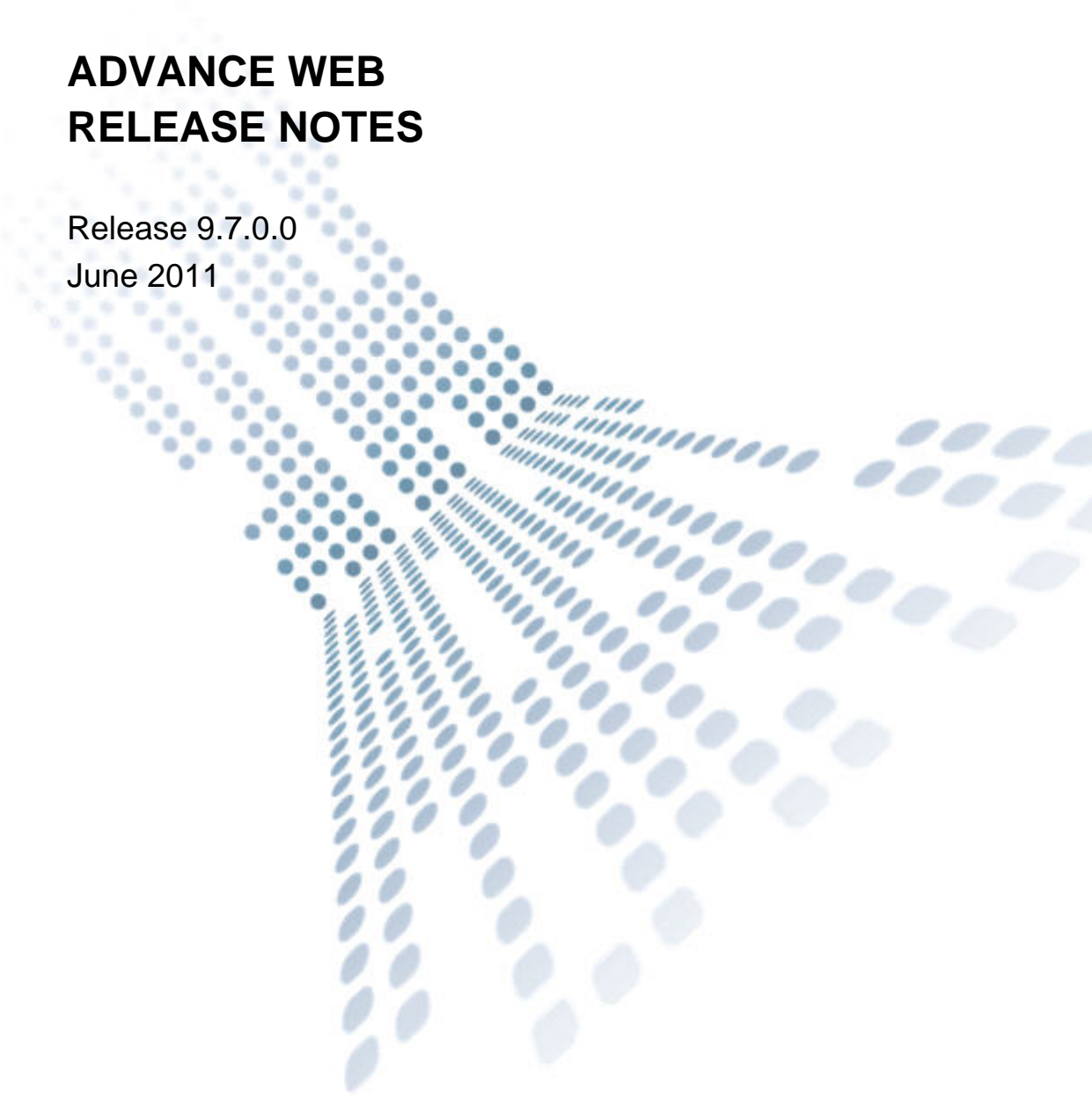


ADVANCE WEB RELEASE NOTES

Release 9.7.0.0
June 2011



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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 9.7.0.0 introduces new functionality, as described below.

In order to increase operational efficiency, the following enhancements are included in this release:

iModules Encompass gift support

Functionality that allows one-time Encompass Online Gift Transactions to be processed by institutions and organizations licensed for iModules and with Gift Maintenance in Advance Web.

Enhanced address update for spouses

This feature provides institutions and organizations with functionality to update certain types of addresses for a married entity's spouse when you make changes, including addition, deletion or ending, to an entity's address information. The popups for optional updates to spouse addresses display from the Marital Info and Address forms.

Contact Report spell checker

Spell checker functionality in Advance Web allows clients using Microsoft Internet Explorer to spell check text in the Text field on the Contact Report form directly in Advance.

Enhanced Go To

A new iteration of Go To provides additional functionality and streamlines the application selection process, while retaining functionality present in previous releases.

Sort / Drag-and-drop

Drag-and-drop functionality allows you to add, remove and specify the order in which items appear when sorting. This functionality is also available when specifying which attributes you wish to include in the Entity Profile Report.

Entity Update with DataLoader refinements

Effective with this release audit data (Operator, User Group, Date Added and Date Modified) associated with the entry of data into Entity Update will be stored with the data in Advance tables after posting with DataLoader.

Configuration Utility

Improved functionality controls the behavior of re-activating user accounts, forcing users to change their password, excluding users from password expiration and the display and control over unlocking an Oracle account.

The following enhancements are related to the alignment of Advance Web and Advance Windows:

Former Spouse display on Entity Overview

Former spouse information is now viewable on the Entity Overview, along with a hyperlink to the former spouse's record. This information is available when the entity is not married, has a record in the former spouse table and the record in the former spouse table has a marital status, whose 'Display on Profile' is enabled.

ID, name, amount and text added to Giving Codes

In order to assist in capturing legacy gift and pledge code data and align Advance Web with Advance Windows, four new columns (ID, Name, Amount and Text) are now available on gift, pledge and matching gift maintenance, list, inquiry and lookup forms for giving codes in Advance Web.

Context-Sensitive Gift and Pledge Reports

Context-sensitive reports were expanded to also include Gift and Pledge.

Credit2 addition to associated donors in gift entry

An additional amount, Credit2, is available on the Gift and Associated Donors forms during gift entry. Information in this field can be used to assist in gift reporting or sending acknowledgments. Each institution and organization can control which donors are eligible to receive Credit2 and establish a limit on the total Credit2 amount that can be assigned to an entity in a given fiscal year.

Pledge receipt dates

You can specify a Date of Receipt for pledge transactions, in the same fashion as entering a Date of Record for gift transaction. This functionality further aligns Advance Web with Advance Windows, as this functionality is now available on both platforms. Date of Receipt is available on the Batch Pledge Details, Pledge Overview, Pledge Reversal Overview, Pledge Lookup and GiftLoader forms.

Assignment priority

Advance Web users that perform a Prospect, Program Prospect or Proposal Lookup are prevented from using Assignment Priority as a lookup criterion unless they enter an Assignment ID as part of their selection criteria.



In order to remain technically progressive, the following enhancements are included in this release:

New Support

Advance Web 9.7.0.0 introduces support for the following:

- Google Chrome 11.0
- Internet Explorer 9
- Mozilla Firefox 4
- Microsoft .NET 4.0
- Microsoft Windows Server 2008 R2 with IIS 7.5
- Apple iPad
- Safari 5 (Mac, iPad , Windows)

Advance Web 9.7.0.0 continues to support Oracle 11g and 11gR2

Database installation overview

The following chart describes the supported Advance database upgrade paths. If your database configuration is not described below, or if you have any questions, please contact customersupport@sungardhe.com prior to beginning the database upgrade or installation.

Please refer to the Advance 9.7.0.0 Database Installation Instructions for additional information. If you are upgrading from a release prior to 9.6.0.1, please note the Advance 9.6.0.1 release documentation contains information that must be followed in order to ensure a successful upgrade to 9.6.0.1 before upgrading to 9.7.0.0.

Current Version	Upgrade Instructions
Advance Web prior to 9.6.0.1	Upgrade to Advance Web 9.6.0.1, then upgrade to Advance Web 9.7.0.0.
Advance Web 9.6.0.1	Upgrade directly to Advance Web 9.7.0.0.
Advance Windows prior to 9.6.0.1	Upgrade to Advance Web 9.6.0.1, then upgrade to Advance Web 9.7.0.0.
Advance Windows 9.6.0.1	Upgrade directly to Advance Web 9.7.0.0.
Advance Windows 9.7.0.0	No database upgrade necessary.
No Advance database installed	Install a new Advance Web 9.7.0.0 database.

SmartCall / Advance Synchronization

The SmartCall / Advance Synchronization allows you to synchronize data in the Advance and SmartCall databases (from Advance to SmartCall) on a regular basis and keep the SmartCall database current with changes to the Advance database.

If you use SmartCall and the Advance Synchronization, please note you must have the correct synchronization versions installed in your Advance and SmartCall databases when your upgrade to Advance Web 9.7.0.0 is complete.

In the SmartCall database:

- You must have the synchronization version that matches your SmartCall version, either SmartCall 9.5.0, 9.6.0 or 9.7.0. All applicable synchronization versions and installation documents are available for download on the Download Center.

In the Advance database:

- You must have the synchronization version delivered with SmartCall 9.7.0, regardless of whether you are using Advance 9.7.0.0 with SmartCall 9.5.0, 9.6.0 or 9.7.0. To upgrade the Advance database when the Advance Synchronization is installed with SmartCall 9.5.0, 9.6.0 or 9.7.0, run **Adv_SC_Synch_Upgrade** against your Advance database using the version delivered with SmartCall 9.7.0. For information on running this file, please refer to the SmartCall 9.7.0 Database Installation Instructions.

If you are simultaneously upgrading a version of Advance and SmartCall, or installing Advance Synchronization for the first time, please contact smartcall-support@sungardhe.com to ensure you upgrade/install the proper version of Advance Synchronization on the SmartCall side.

SmartCall utilities

This release of Advance supports a new version, 3.8, of the SmartCall Integration Utility (SIU), which can be downloaded along with the documentation from the SunGard Higher Education Documentation and Download Center. For additional information, please contact smartcall-support@sungardhe.com.

If you use SmartCall and the corresponding integration utilities, please note the following versions are compatible with Advance 9.7.0.0:

SmartCall Integration Utility (SIU)

- Version 3.8 (for SmartCall 9.5.0, 9.6.0 and 9.7.0)

Pledge Integration Utility (PIU)

- Version 2.9 (for SmartCall 9.7.0)
- Version 2.8 (for SmartCall 9.5.0 and 9.6.0)



New Features and Functionality

Advance Web 9.7.0.0 introduces new features and functionality, as described below.

Support

New support

Advance Web 9.7.0.0 introduces support for the following:

- Google Chrome 11.0
- Internet Explorer 9
- Mozilla Firefox 4
- Microsoft .NET 4.0
- Microsoft Windows Server 2008 R2 with IIS 7.5
- Apple iPad
- Safari 5 (Mac, iPad , Windows)



Note

The iPad does not allow you to perform certain functionality in Advance Web due to integration with 3rd party software and the need to integrate with additional hardware. This includes, but may not be limited to, attaching documents, exporting data, generating labels, loading and scanning documents with Advance Document Management (ADM) and using mail merge. If you have any questions regarding support for the iPad, please contact customersupport@sungardhe.com.

Contact Report spell checker

Firefox, Safari and Google Chrome provide built-in browser functionality that allows users to spell check text on a form. This functionality does not exist in Microsoft Internet Explorer and clients that wish to spell check text must copy the text to an intermediate editor, spell check the text, then enter it in Advance Web.

Effective with Advance Web 9.7.0.0, spell checker functionality is integrated with Advance Web and allows clients using Microsoft Internet Explorer to spell check text in the Text field on the Contact Report form directly in Advance.



Note

This functionality does not apply to Firefox, Safari and Google Chrome, as they already include built-in spell checker functionality.



Note

This functionality only applies to the Text field on the Contact Report form.

Web configuration setup

A new key in the Advance Web configuration file (Web.Config) activates the spell checker when entering or modifying text on the Contact Report form (Form ID = 80086) in Microsoft Internet Explorer.

By default this key is set to Y (enabled). To confirm this setting:

1. Open the Web.Config file on the Web server where Advance Web is installed.
2. Locate the following key:

```
<add key="UseSpellCheck" value="Y" />
```
3. Confirm the value is set to Y.

To disable the spell checker functionality:

1. Open the Web.Config file on the Web server where Advance Web is installed.
2. Locate the following key:

```
<add key="UseSpellCheck" value="Y" />
```
3. Change the value from Y to N. When complete, it should look as follows:

```
<add key="UseSpellCheck" value="N" />
```
4. Save your changes.
5. Purge the cache on the server by navigating to the utilities.aspx page (for example: <http://localhost/AdvanceWeb/utilities.aspx>) and click Purge Cache.

Using spell checker

When the spell checker is enabled and a user accesses the Contact Report form (Form ID = 80086) using Microsoft Internet Explorer, text entered in the Text field is automatically spell checked. When a misspelled word or word not in the dictionary on the Web Server is encountered, the word is underlined in red to bring attention to the word.

ADVANCE Advance Work [Logoff]

Home x Contact Reports x Contact Report (New) x

Contact Report Actions

Detail

Contact Report (New) Save Actions Help

New Contact Report
Use this page to enter a new Contact Report, following the guidelines provided below.

- 1) Enter details about recent activity using the Contact Report form below.
When you have finished entering details press Save.
- 2) You can attach a Document to a Contact Report.
- 3) You can enter Staff Credit details to identify who gets credit for this activity.
- 4) Identify those on the Distribution List for receiving a copy of this Contact Report.
- 5) You can tie one or more follow-up Tasks to this Contact Report.
- 6) Use Entity Update to record updated biographic information for contacted entities.

Contact Report

Report ID 0 Date* 03/24/2011

Contacted ID 4001 Mr. Jeff O'Neil (#87)

Joint

2nd ID

Contact Type* V Visit

Purpose* C Cultivation

Unit

Author* 19027 Mr. Robert Park

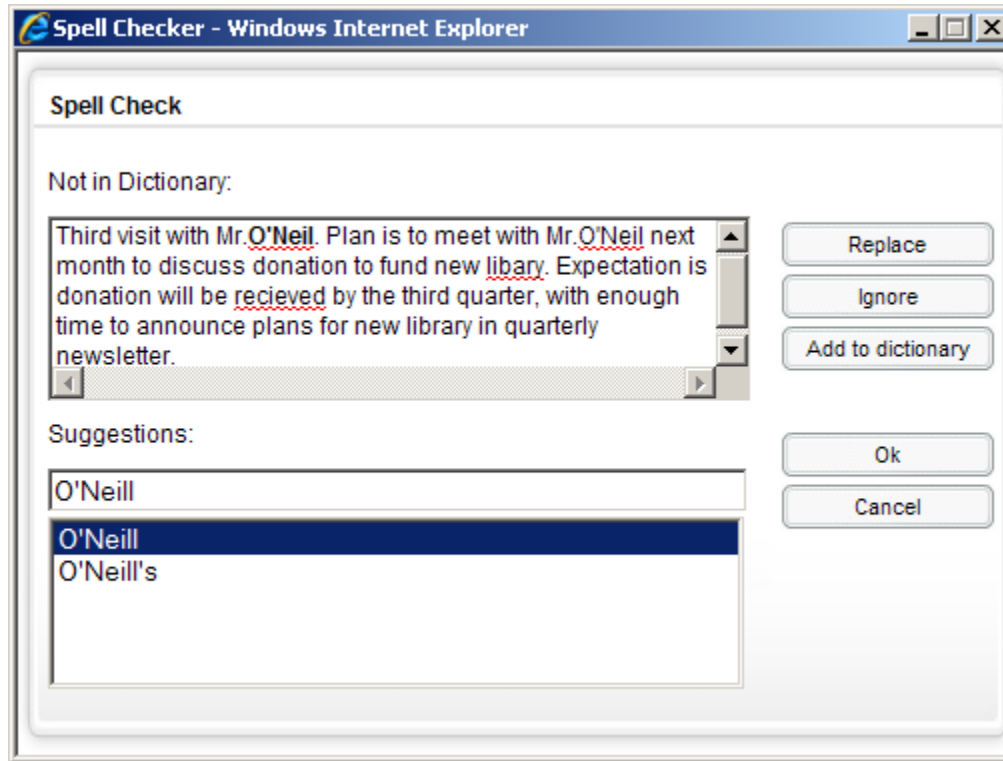
Description* Plans for new library

Text

Third visit with Mr. O'Neil. Plan is to meet with Mr. O'Neil next month to discuss donation to fund new library. Expectation is donation will be received by the third quarter, with enough time to announce plans for new library in quarterly newsletter.

To use the spell checker:

1. Right-click the underlined word and select the proper spelling.
- or
2. Click the graphic to the left or use the Ctrl + U keyboard shortcut to invoke the spell checker.



3. Correct or ignore words identified as possible misspellings, as appropriate.
4. Click OK to return to the Contact Report form.

Note

When you add a word using the **Add to dictionary** option, the word is not stored on the Web Server where Advance Web is installed. The new word is stored in a cookie, unique to that browser, on the computer where the word was added. If a different browser on that machine is used to access Advance Web, the word will not appear in the dictionary. Additionally, if the cookie is deleted from the browser used to add the word, the word will be deleted along with the cookie.

Configuring the spell checker graphic

The Contact Report form includes a graphic that allows users to invoke the spell checker.

To replace the spell checker graphic:

1. Create your image.
2. Navigate to the \images directory on your Web Server where Advance Web is installed and make a backup of the **spellcheck.png** file. Store this file in a safe location for later use in the event you need to revert to the default version of the file.
3. Place your image (from step 1) in the \images directory.
4. Open the Advance Configuration Utility.
5. From the Web menu select 'Web Admin' then 'Forms.'
6. When the Select Profile prompt appears, select a profile.
7. Scroll through the list of forms and select Form ID 80086.
8. Scroll through the list of form controls and select **image_spell_checker**.
9. Enter the name of your graphic in the Data field.

The screenshot shows the 'Forms and Controls Maintenance' application window. The 'Form Controls' tab is active, displaying a 'Controls List' table and a 'Form Control Maintenance' configuration panel.

X	Y	Control Name
9	65	80086_unit_code_t
10	65	80086_unit_code
90	70	obj_254728021_2138
890	70	author_id_number_211
90	80	description_t_2132
890	80	description_2131
90	90	summary_t_2161
890	90	text_place_holder_2171
890	95	image_spell_checker
80	100	obj_254728028_2144
880	100	program_code_2145
100	110	initiated_by_t
900	110	initiated_by
100	120	outcome_t
900	120	outcome
100	130	attitude
900	130	attitude_t

The 'Form Control Maintenance' panel for the selected control 'image_spell_checker' shows the following configuration:

- Name: image_spell_checker
- Type: Image
- Sequence: 1
- X Position: 890
- Y Position: 95
- Row Span: 1
- Column Span: 1
- FK Type: (empty)
- Alignment: Right
- Validation: (empty)
- HTML ID: image_spell_checker
- Data: images/spellcheck.png (highlighted with a red box)
- Class: (empty)
- Other Attrib: style=display:none
- Columns: 18
- Rows: 18

10. Click Save.
11. Purge the cache on the server by navigating to the utilities.aspx page (for example: <http://localhost/AdvanceWeb/utilities.aspx>) and click Purge Cache.
12. Open Advance Web and notice the new image appears on the Contact Report form.

Enhanced Go To

Go To provides access to a list of applications that allows users to quickly navigate to their final destination and avoid clicking buttons and selecting page tree items. In Advance Web 9.7.0.0, a new iteration of Go To provides additional functionality and streamlines the application selection process, while retaining functionality present in previous releases.



Note

An entry in the Web.Config file allows you to specify whether you wish to use the new enhanced Go To or revert to the legacy Go To in previous releases.

The screenshot shows the ADVANCE web application interface. A 'Go To' dialog box is open, displaying a table of applications. The table has four columns: Application, ID, Mnemonic, and Type. The applications listed include 'Ack Candidate List', 'Ack Helper', 'Activities', 'Add Organization', 'Add Person', 'Addresses', 'Admissions Volunteer Activities', 'Affiliations', 'Alerts', 'Alerts and Messages', 'Allocation', 'Allocation (New)', 'Allocation Assignments', 'Allocation Beneficiaries', 'Allocation Financials', 'Allocation Notes', 'Allocation Points', 'Allocation Stewardees', and 'Allocation Tasks'. The 'Type' column indicates whether an application is an 'Entity' or 'Allocation'.

Application	ID	Mnemonic	Type
Ack Candidate List	160	ACKCL	
Ack Helper	162	ACKHU	Entity
Activities	2100	ACT	Entity
Add Organization	1201	ORGNEW	
Add Person	1200	ENTNEW	
Addresses	2101	ADDR	Entity
Admissions Volunteer Activities	2102	ADVOL	Entity
Affiliations	2103	AFFIL	Entity
Alerts	152	ALERT	Entity
Alerts and Messages	150	ALMSG	Entity
Allocation	80352	ALLOC	Allocation
Allocation (New)	80815	ALLOCNEW	
Allocation Assignments	80353	ALLOCA	Allocation
Allocation Beneficiaries	80354	ALLOCB	Allocation
Allocation Financials	80355	ALLOCF	Allocation
Allocation Notes	80356	ALLOCN	Allocation
Allocation Points	80840	ALLOCP	Allocation
Allocation Stewardees	80357	ALLOCS	Allocation
Allocation Tasks	80358	ALLOCT	Allocation

With the enhanced Go To, a user can:

- Select an Application from the list.
- Enter a Mnemonic in the Application field.
- Enter an Advance Web Application ID or an Advance Window ID in the Open with ID field (to assist institutions and organizations migrating from Advance Windows to Advance Web).
- Select an Application via auto complete by typing the first few letters (for example, type Prosp to see all Applications with Prospect in the name).
- Enter an ID in the Open with ID field, only when an ID is allowed; the Open with ID field does not display when an Application that does not accept an ID is selected.
- Accept the most recently accessed ID when it defaults in the Open with ID field, if one exists.
- Perform an F2 lookup to locate the applicable ID, if the ID is not known.

Additionally, please note the following when working with the enhanced Go To:

- You can click Go or press Enter to initiate Go To after your selection is complete.
- If an invalid Application is manually entered, the value in the Application field is highlighted to indicate the invalid entry.
- If an invalid ID is entered, a message indicating the invalid ID appears.
- You are navigated back to the current application if you close Go To without making a selection. You can close Go To as follows:
 - Click X in the upper-right corner of Go To
 - Press Esc
- Entries in Go To can be configured using the AWA GoTo Listings Window in the Advance Configuration Utility.
- Entries in Go To can only be accessed by users that have security access to those applications. Applications to which a user does not have access do not appear in Go To.
- Existing functionality for Accessibility (508) users is preserved with the new Go To

Web configuration setup

A new key in the Advance Web configuration file (Web.Config) allows you to determine whether you wish to use the enhanced Go To or the legacy Go To available in previous releases.

By default this key is set to False, indicating the new enhanced Go To will be used. To confirm this setting:

1. Open the Web.Config file on the Web server where Advance Web is installed.
2. Locate the following key:

```
<add key="LegacyGoTo" value="False" />
```
3. Confirm the value is set to False.

To revert to the legacy Go To:

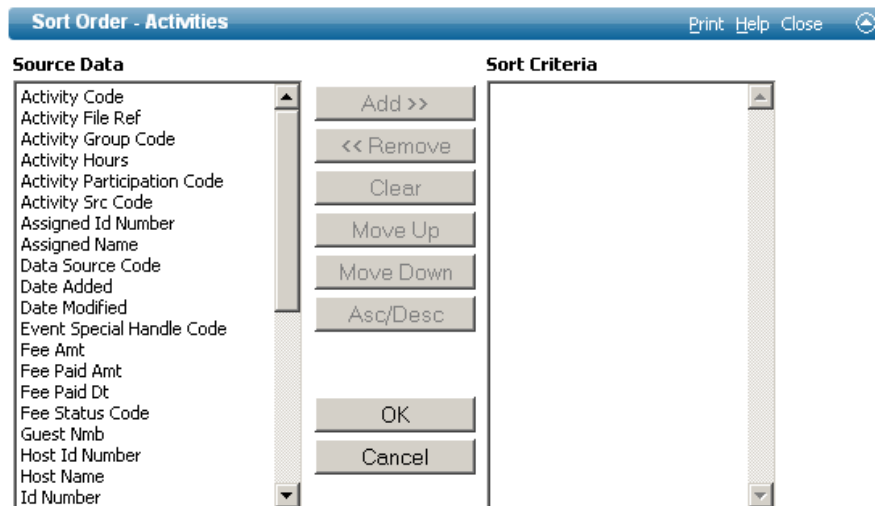
1. Open the Web.Config file on the Web server where Advance Web is installed.
2. Locate the following key:

```
<add key="LegacyGoTo" value="False" />
```
3. Change the value from False to True. When complete, it should look as follows:

```
<add key="LegacyGoTo" value="True" />
```
4. Save your changes.
5. Purge the cache on the server by navigating to the utilities.aspx page (for example: <http://localhost/AdvanceWeb/utilities.aspx>) and click Purge Cache.

Sort / Drag-and-drop

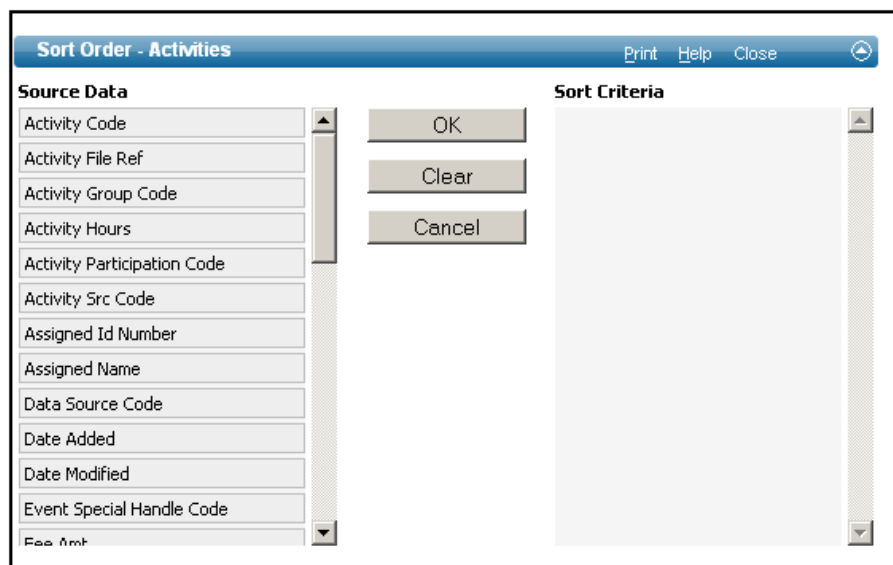
In previous releases, selecting Sort from the Actions Menu on the Form Header while current on a list invoked the Sort Order prompt. Using this prompt you could use buttons located between the **Source Data** and **Sort Criteria** fields to specify the attributes to be included when sorting the list along with the order in which the items appeared.



Effective with Advance Web 9.7.0.0, you can use drag-and-drop functionality to add, remove and specify the order in which the items will appear when sorting. When you drag an item from the Sort Data column and drop it in the Sort Criteria column, it is automatically sorted in ascending order. Click the item in the Sort Criteria list to re-sort the item in descending order. To re-order items in the Sort Criteria column, drag the item within the column.

Note

This functionality is also available when specifying which attributes you wish to include in the Entity Profile Report.



Entity Update with DataLoader refinements

Effective with this release audit data (Operator, User Group, Date Added and Date Modified) associated with the entry of data into Entity Update is stored with the data in Advance tables, after posting with DataLoader. Previously, audit data associated with the DataLoader operator was stored in the Advance tables. To accomplish this, audit data currently stored by entity update in the tables below will be applied to the Advance table records created or updated by DataLoader for data originating from entity update only.

Application/Page Tree Listing	Maintenance Form	Table Updated
Primary Name/Details	86200	awc_loader_entity
Home Address	86202	awc_loader_address
Business Address	86204	awc_loader_address
Email Address	80902	awc_loader_email
Spouse Information	86206	awc_loader_marital_info
Employment	86208	awc_loader_employment

 **Note**

This change did not result in modifications to any of the tables shown above or any Advance tables, only the data being transferred to the Advance tables.



Former Spouse display on Entity Overview

This release allows you to view former spouse information along with a hyperlink to the former spouse's record, on the Entity Overview. Former spouse information appears when all of the following conditions are met:

- The entity is not married.
- The entity has a record in the former spouse table.
- The record in the former spouse table has a marital status, whose 'Display on Profile' is enabled.

The screenshot shows the 'Entity Overview' page for Mrs. Janet Fondaw #19146. The page is titled 'ADVANCE' and shows the user 'Norman Flanders [Logoff]'. The main content area displays the following information:

- Entity Overview** (Actions Print)
- Mrs. Janet Fondaw #19146**
- Rec Type**: Alumnus Alumna (1977 Business)
- Degree**: BA 1977
- Prim Affil**: Divorced: [Stuart Levin, Esq #19650](#)
- Contact Information** (Actions Help)
- Home (Preferred)**: 27 Cold Creek Ln., Fairview, TN 37062-9216, (615) 555-8319 (H, Pref)

Note

If the entity has multiple former spouse rows, where the statuses have the Display On Profile enabled in `tms_marital_status`, the Entity Overview will display the most recent former spouse on the Entity Overview. The most recent former spouse is defined as the one with the most recent date modified in the Former Spouse database table.

Note

If the entity is married, the name and hyperlink to their spouse's Entity Overview will display, as in previous releases.

TMS Marital Status

Functionality for displaying the former spouse on the Entity Overview is enabled when one or more Marital Statuses have the Display on Profile check box checked in TMS Marital Status. The default for 'Display on Profile' is unchecked (N).

Note

The Display on Profile check box should only be checked for marital statuses used for Former Spouse information that displays on the Former Spouse application and resides in the former spouse database table. Failure to adhere to this rule will prevent the spouse's name from appearing on the Entity Overview.

TMS Edit Code Table Actions

TMS Code Definition Marital Status (tms_marital_status)

TMS Codes (9/11) Save New Actions Help

Marital Status Code	Short Desc
R	Married at Time of Death
S	Single
T	Just Living Together
W	Widowed
X	Separated
Z	Deceased Spouse

Marital Status Code*	<input type="text" value="W"/>
Short Desc*	<input type="text" value="Widowed"/>
Full Desc	<input type="text"/>
Married Ind	<input type="text" value="W"/> <input type="text" value="Widowed"/>
Owner Usergroup	<input type="text" value="CO"/> <input type="text" value="SGHE"/>
	<input checked="" type="checkbox"/> Active
Hierarchy Order	<input type="text" value="0"/>
Require Spouse Info Ind	<input type="text" value="N"/> <input type="text" value="N"/>
	<input checked="" type="checkbox"/> Use for AWC
	<input checked="" type="checkbox"/> Display On Profile
Comment	<input type="text"/>

Enhanced address update for spouses

This release provides institutions and organizations with functionality to update spouse address information when you make changes, including addition, deletion or ending, to an entity's address information. The following functionality is a part of this new feature:

- Institutions and organizations can designate certain address types as 'Eligible for Spouse Update'.
- When you add a marital relationship for an entity, you have the option to add 'Eligible for Spouse Update' addresses to the other entity's record.
- When adding a new 'Eligible for Spouse Update' type address for a married entity, you have the option to add that address to their spouse's record. If you choose to add the new address you may also choose to end an existing address of the same address type. The telephone number associated with the new address will be added to the entity's address but not linked to the spouse's address record.
- When modifying (in a way other than deleting or ending) an 'Eligible for Spouse Update' type address, you have the option to add that address to the spouse's record. You have the ability to either add the new address or to add the address and also end an existing address.
- When you end an 'Eligible for Spouse Update' type address or change an 'Eligible for Spouse Update' address to a type that is not 'Eligible for Spouse Update', you have the option to end an address of the same type on the spouse's record.
- When you delete an 'Eligible for Spouse Update' type address, you have the option to delete an address of the same type from the spouse's record.



Note

Advance Web will not update preferred addresses in any way based on these spouse updates. If you need to affect a Preferred address, you must do so in the Address application. In addition, spouse updates involving ending addresses will not end telephone numbers.



Note

The new enhanced address update functionality applies to all marital relationships regardless of whether they are designated for Same Home Address or not.

Address Type modifications

The Address Type (tms_address_type, AH) form was modified with the addition of a 'Eligible for Spouse Update' check box which, when checked for the appropriate address row, enables the functionality.

The screenshot shows the 'TMS Edit Code Table' interface. At the top, there's a header 'TMS Edit Code Table' with an 'Actions' button. Below it, the 'TMS Code Definition' is 'Address Type (tms_address_type)'. A sub-header 'TMS Codes (9/10)' includes 'Save', 'New', 'Actions', and 'Help' buttons. A table lists address types with columns 'Addr Type Code' and 'Short Desc':

Addr Type Code	Short Desc
M	Main Office, Headquarters
P	Past Home
Q	Past Business
R	Reference
S	Seasonal
T	Past Seasonal

Below the table is a form for editing a code. The 'Addr Type Code*' field contains 'S'. The 'Short Desc*' field contains 'Seasonal'. The 'Long Desc' field contains 'Current seasonal address'. The 'Owner Usergroup' is set to 'CO' (SGHE). There are checkboxes for 'Current' (checked), 'Active' (checked), 'Business' (unchecked), and 'Eligible for Spouse Update' (checked, highlighted with a red box). The 'Hbs Code' field contains 'S' (Seasonal).

Note

Same Home Address functionality in Advance Web associates Home (H) addresses to spouses, so the new feature does not apply to Home addresses. Business address types are also excluded from the new functionality.

If one of the following conditions exists, a warning message will display when you save your changes, indicating the address type is not eligible for spouse update:

- 'Business' check box is checked
- 'Addr Type Code' is 'H', 'P', 'Q', or 'B'
- 'Current' check box is not checked
- Active check box is not checked

Note

If the 'Eligible for Spouse Update' check box is checked and the address type is modified by putting one of the above conditions into effect, the 'Eligible for Spouse Update' check box will automatically be unchecked.

Once the check box is checked, the feature is enabled for this address type. When you make an address modification, addition or deletion, the change will be eligible for association with the spouse entity's records.

Adding a new spouse

When you record a new marital relationship between two entities, you have the ability to indicate that the spouses share a home address and you can also indicate which entity's address should be used for that shared address. Addresses that are 'Eligible for Spouse Update' can be added to the record of their new spouse, as well. The popup lists the addresses eligible for associating with each spouse.

Spouse Address Update

Add the selected address(es) and telephone numbers to the spouse's record. Create an Address Link between each new address and its telephone numbers.

Rodrigo Abir #1127 Ms. Niamh McArdle #20035

Seasonal
22 Lois Lane
Kennebunk, ME

Please Note

- Advance will not create duplicate addresses or telephone numbers. If you attempt to add an address that matches an existing active spouse address, Advance will only add new telephone numbers and link them to the existing address.
- Advance will not end or replace any existing address, and it will not update preferred address or preferred telephone information for either entity. Please access Address and/or Telephone to update this information.

Check the check boxes for the eligible address(es) you want to copy to the other spouse. Save your changes. In the example shown above, only one spouse has an eligible address, so checking the check box and saving will copy the address to the other spouse's record. Telephone numbers linked to a copied address will be added to the spouse record and linked to the new spouse address. If the telephone number already exists on the spouse record, Advance Web will not add a duplicate telephone number.

Clicking 'Save without Spouse Update', or leaving the check box(es) unchecked, will not copy any eligible address to either record.

Adding an eligible address

Upon saving a new address whose Address Type has its 'Eligible for Spouse Update' check box checked, you are presented with the 'Spouse Address Update' popup, as shown below.

Spouse Address Update

OPTION 1
Add the entity address and telephone numbers (if any) to the spouse's record. End the address selected below by changing its status to Inactive and adding a Stop Date of today. Telephone numbers linked to the ended address will not be affected.

Seasonal
34 Lois Lane
Kennebunk, ME

OPTION 2
 Add the entity address and telephone numbers (if any) to the spouse's record. Do not update any other address information for the spouse.

Please Note

- Advance will not create duplicate addresses or telephone numbers. If you attempt to add an address that matches an existing active spouse address, Advance will only add new telephone numbers and link them to the existing address.
- Neither of these options will update spouse preferred address or preferred telephone information. Please access spouse Addresses and/or Telephone to update this information.

In this example, the user entered a new Seasonal address (whose Address Type is 'Eligible for Spouse Update') on the married entity's record. There is already a Seasonal address on the spouse record, so you are presented with Option 1, which allows you to end the existing address and add the new seasonal address. If you want to end an address, select the radio button for the address to end.

If there was no existing seasonal address for the spouse, Option 1 would indicate that there are no qualifying addresses to end. Regardless of whether or not an Option 1 address exists, selecting Option 2 instructs Advance Web to add the new address to the spouse record and make no changes to existing spouse addresses. Click 'Save' to update the current entity's record and apply your chosen changes, if any, to the spouse's record. Click 'Save without Spouse Update' to update only the current entity. Saving without selecting a radio button saves the changes for the current entity without updating the spouse record.

If the address you are adding already exists on the spouse's record, a message will display indicating it is a duplicate and will not be added. The telephone number associated with the new address will be added to the entity's address but not linked to the spouse's address record. If the telephone number already exists on the spouse record, Advance will not add a duplicate telephone number.

i Spouse Address Update - Advance did not create a new spouse address because the address you chose to add already exists on the spouse record. If you added a new phone number and it is not a duplicate, Advance added it to the spouse record.

Ending an address

When you change an Active 'Eligible for Spouse Update' address to a status that is not coded as Active, to an address type that is not Current, or to an address type that is not 'Eligible for Spouse Update', you are presented with the 'Spouse Address Update' popup upon saving the address. A sample popup is shown below.

Spouse Address Update

Select one of the spouse addresses below to end the address. Advance will assign Stop Date, Address Type, and Address Status to match those on the entity address you ended. Telephone numbers linked to the ended address will not be affected. Click Save without Spouse Update if you do not want to end a spouse address.

Seasonal
333 Florence Street
Cape Elizabeth, ME

If you modified address type on the previous window to 'Home' and the spouses have 'Same Home Address' set to yes, Advance will automatically add the address as the spouses' new home address and end any existing home address.

In this example, a Seasonal address (which is 'Eligible for Spouse Update') was made Inactive for the Entity. The spouse has a Seasonal address on their record, so you have the option to end that Seasonal address. You may select a radio button and 'Save' to update both the entity and their spouse's records. Select 'Save without Spouse Update' to record the address change for only the current entity. Saving without selecting a radio button saves the changes for the current entity without updating the spouse record.

Updating an eligible address

Upon saving a modification to an Active address that has an Address Type that is 'Eligible for Spouse Update', you are presented with the 'Spouse Address Update' popup, as shown in the sample below.

Spouse Address Update

OPTION 1
Add the entity address and telephone numbers (if any) to the spouse's record. End the address selected below by changing its status to Inactive and adding a Stop Date of today. Telephone numbers linked to the ended address will not be affected.

Seasonal
34 Lois Lane
Kennebunk, ME

Seasonal
33 Florence Street
Cape Elizabeth, ME

OPTION 2
 Add the entity address and telephone numbers (if any) to the spouse's record. Do not update any other address information for the spouse.

Please Note

- Advance will not create duplicate addresses or telephone numbers. If you attempt to add an address that matches an existing active spouse address, Advance will only add new telephone numbers and link them to the existing address.
- Neither of these options will update spouse preferred address or preferred telephone information. Please access spouse Addresses and/or Telephone to update this information.

In this example, the user modified a Seasonal address (whose Address Type is 'Eligible for Spouse Update') for a married entity. The popup box indicates that the entity's spouse has two active Seasonal addresses on their record. Option 1 presents you with the option to add the modified entity address to the spouse record and also end one of the existing addresses for the spouse. For example, by selecting the second address, you are indicating you wish this address (for the spouse) to be made Inactive and replaced by the new, Active, modified address. If a qualifying address does not exist on the spouse record, a message will display in Option 1 indicating 'No spouse addresses qualify for this option'.

If you want to add the modified address to the spouse record without making any changes to existing spouse addresses, you may select the Option 2 radio button. Click 'Save' to update both the entity and their spouse's records. Select 'Save without Spouse Update' to record the address change for only the current entity. Saving without selecting a radio button saves the changes for the current entity without updating the spouse record. Telephone numbers linked to the copied address will be added to the

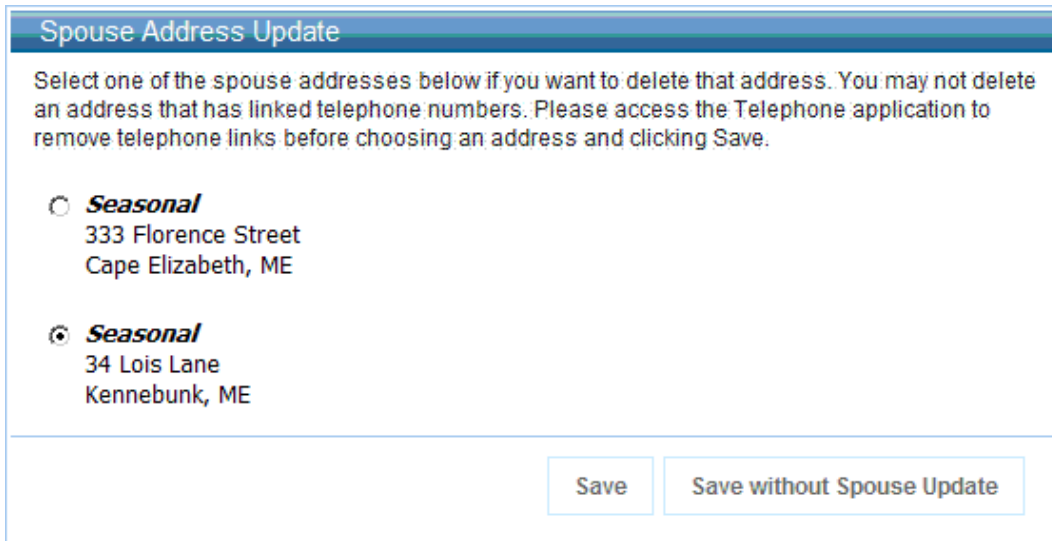
spouse record and linked to the new spouse address. If the telephone number already exists on the spouse record, Advance will not add a duplicate telephone number.

 **Note**

Updating an address only applies to 'Eligible for Spouse Update' addresses that do not meet the criteria of addresses detailed in the preceding section 'Ending an Address'.

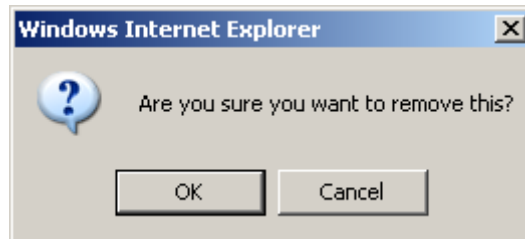
Deleting an eligible address

When you delete an 'Eligible for Spouse Update' address from a married entity's record, it is possible that you also want to delete an address from the spouse record. When you click 'Delete', a popup displays providing functionality to delete an address from the spouse's record. If there are multiple eligible address records, they will display and you can select the radio button for the correct address.



The dialog box is titled "Spouse Address Update". It contains the following text: "Select one of the spouse addresses below if you want to delete that address. You may not delete an address that has linked telephone numbers. Please access the Telephone application to remove telephone links before choosing an address and clicking Save." Below the text are two radio buttons, both labeled "Seasonal". The first radio button is unselected and is followed by the address "333 Florence Street, Cape Elizabeth, ME". The second radio button is selected and is followed by the address "34 Lois Lane, Kennebunk, ME". At the bottom right of the dialog box are two buttons: "Save" and "Save without Spouse Update".

As shown in the example above, clicking 'Save' identifies you want to perform the deletion for the entity as well as delete the selected address for the spouse. Clicking 'Save without Spouse Update' indicates you want to perform the deletion for the entity, but do not want to delete any spouse addresses (clicking 'Save' with no radio buttons selected has the same result). The following dialog displays:



Clicking 'OK' deletes the entity address as well as the chosen spouse address (in this example we clicked 'Save'). Clicking 'Cancel' will not delete eligible addresses for either the entity or the spouse.

Gift

ID, name, amount and text added to Giving Codes

In order to assist in capturing legacy gift and pledge code data and align Advance Web with Advance Windows, four new columns (ID, Name, Amount and Text) are now available on gift, pledge and matching gift maintenance, list, inquiry and lookup forms for giving codes in Advance Web.



Note

The functionality described in this section was first introduced to the Advance database when it was included in a prior release of Advance Windows. As such, no changes were made to the Advance database in Advance Web 9.7.0.0 in order to accommodate this feature.

Master list detail forms

When you click a Giving Codes hyperlink, Advance Web displays the Giving Codes application. At the top is the Giving Codes master list detail form, from which you can select the Giving Code and view the details below. The row in the master list form displays one row of data for every Giving Code linked to the transaction. Effective with this release, Giving Codes master list detail forms include an additional column that displays Name data associated with the Giving Codes row.

Code Type	Code Description	Date	Name
Challenge	Center for Excellence Challenge	Apr 04, 2011	Mr. Jeff O'Neil #40

Type*	<input type="text" value="C"/> Challenge	Date	<input type="text" value="04/04/2011"/>
Code*	<input type="text" value="EXC"/> Center for Excellence Challenge		
Amount	<input type="text" value="150.00"/>		
ID	<input type="text" value="4001"/> Mr. Jeff O'Neil (#87)		
Name	<input type="text"/>		
Text	<input type="text" value="This gift only partially fulfills the requirement of the challenge. Please contact Mr. Carver and let him know a small increase will fulfill the challenge."/>		
Comment	<input type="text"/>		

The value that appears in the Name column in the master list details forms displays information, as follows:

- If there is an Entity ID associated with the Giving Code row, the entity's Preferred Mail Name appears in the Name column, along with a hyperlink that navigates you to the entity's Entity Overview.
- If there is Name data (free-form text) associated with the Giving Code row, that information displays in the Name column.
- If there is no Entity ID or Name data recorded for a Giving Code row, the Name column will appear blank.

Giving codes master list detail forms that contain this new column include the following:

Form ID	Description
80592	Gift Ledger Details – Giving Codes
90371	Gift Update – Giving Codes
80155	Gift Profile – Giving Codes
80609	Pledge Ledger Details – Giving Codes
90400	Pledge Update – Giving Codes
80211	Pledge Profile – Giving Codes
90392	Matching Gift Ledger Details – Giving Codes
50455	Matching Gift Profile – Giving Codes
90425	Matching Gift Update – Giving Codes

Maintenance forms

Giving code maintenance forms allow entry operators to add and modify giving codes for Gifts, Pledges and Matching Gifts. Effective with this release, ID, Name, Amount and Text information can be maintained on giving code maintenance forms. These new fields appear when a user accesses any of the Giving Code maintenance forms.

Code Type	Code Description	Date	Name
Challenge	Center for Excellence Challenge	Apr 04, 2011	Mr. Jeff O'Neil #40

Type* C Challenge **Date** 04/04/2011

Code* EXC Center for Excellence Challenge

Amount 150.00

ID 4001 Mr. Jeff O'Neil (#87)

Name

Text
This gift only partially fulfills the requirement of the challenge. Please contact Mr. Carver and let him know a small increase will fulfill the challenge.

Comment

These four new fields are defined as follows:

- Amount** The amount associated with this Giving Code for this transaction.
- ID** This is the ID number of the person associated with the giving code and can be the ID of any Advance entity, and is typically not the person making the gift. This may be, for example, the staff member responsible for capturing the gift, the person to receive notification of memorial gifts, or the student caller responsible for recording the gift during a telemarketing call. Click F2 to invoke the context-sensitive ID Lookup if you do not know the ID of the entity you wish to associate with the giving code. If an ID number is entered in this field, a value can not be entered in the Name field below. If an ID is entered, the Preferred Mail Name of that entity appears to the right of the ID.

Name This field can be used to indicate the name of the person associated with the giving code. There is no restriction on the name entered in this field and can be anyone, except the person making the gift. If a name is entered in this field, a value can not be entered in the ID field above.

Text Additional text to describe this Giving Code for this transaction.

Giving codes maintenance forms that contain these new fields include the following:

Form ID	Description
80593	Gift Ledger Details – Giving Codes
90372	Gift Update – Giving Codes
80610	Pledge Ledger Details – Giving Codes
90401	Pledge Update – Giving Codes
90425	Matching Gift Update – Giving Codes
80182	Matching Gift Giving Codes

Inquiry forms

In addition to maintenance and master list detail forms, Giving Code details appear on forms that are designed solely for inquiry. Inquiry forms display when you click Giving Codes while current on the Gift Profile, Pledge Profile and Matching Gift Profiles. Effective with this release, ID, Name, Amount and Text information displays on these forms in inquiry-only.

Giving Codes				Actions	Print
Primary Donor	! Mr. Chad Carver #100689 (+76 %84 *92 B96 I03 *07)				
Date of Record	Apr 04, 2011	Trans Type	Gift		
Legal Amt	100.00	Payment Type	Check/Cash		
Receipt #	106461				
Allocation	Annual Fund	Donors		1	

Associated Donors (1/1)				Actions	Help
Name	Amount	Allocation	Association		
! Mr. Chad Carver #100689 (+76 %84 *92 B96	100.00	Annual Fund	Primary		

Giving Codes (1/1)				Actions	Help
Code Type	Code Description	Date	Name		
Challenge	Center for Excellence Challenge	Apr 04, 2011	#Mr. Jeff O'Neil		

Type	Challenge	Date	Apr 04, 2011
Code	Center for Excellence Challenge		
Amount	150		
ID	Mr. Jeff O'Neil #4001 (#87)		
Name			
Text	This gift only partially fulfills the requirement of the challenge. Please contact Mr. Carver and let him know a small increase will fulfill the challenge.		
Comment			

Giving codes inquiry forms that contain these new fields include the following:

Form ID	Description
80156	Gift Profile – Giving Codes
80212	Pledge Profile – Giving Codes
50456	Matching Gift Profile – Giving Codes

Lookup form

In addition to viewing and maintaining information in these new fields, you can also perform a Giving Code lookup using the Gift Codes Lookup form, which contains new fields for ID, Name and Amount. When an ID is entered, the name will appear to the right.

Gift Codes Actions

1. Choose a template (optional)
2. Select results format* Entity 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

View Criteria Clear Search

Gift Codes Help

Type	=	(All)
Code	=	(All)
Date	=	
ID	=	
Name	=	
Amount	=	
Comment	=	

Giving codes lookup forms that contain these new fields include the following:

Form ID	Description
90077	Gift Codes

Credit2 addition to associated donors in gift entry

This release introduces functionality that allows users to record and edit an additional amount, Credit2, on the Gift Donors and Associated Donors forms during gift entry. Information in this field can be used for a variety of purposes, such as assisting in gift reporting or sending acknowledgments. Each institution and organization can control which donors are eligible to receive Credit2 and establish a limit on the total Credit2 amount that can be assigned to an entity in a given fiscal year.



Note

Credit2 is considered soft credit and is not used in calculating legal or hard credit amounts for the CAE Report or reported to the Internal Revenue Service.

TMS Maintenance Setup (zz_credit2_cap)

The zz_credit2_cap view defines the largest total amount that can be in the Credit2 field for all gifts for a single donor in a fiscal year. Once that total is reached, all other transactions with a Credit2 amount for that donor in that fiscal year are automatically decreased to zero by gift processing. For each year you want to enforce a Credit2 cap, enter the year and the amount of the cap. If you do not wish to enforce a cap for a fiscal year, do not enter a cap for the fiscal year.

To add a Credit2 cap amount for a fiscal year:

1. From the Main Menu click Go To.
2. Select TMS Edit Code Table List and click Go.
3. Drill-down on the Credit2 Cap view.
4. Select New on the Form Header.
5. Enter the Fiscal Year of Giving and a Credit2 Cap amount in the applicable fields.
6. Click Save on the Form Header.

The screenshot shows the 'TMS Edit Code Table' interface. At the top, there is a header 'TMS Edit Code Table' with an 'Actions' link. Below it, the table is titled 'TMS Code Definition Credit2 Cap (zz_credit2_cap)'. The table has two columns: 'Year Of Giving' and 'Credit2 Cap'. The first row shows '2011' and '25,000.00'. Below the table, there is a form with the following fields:

- Year Of Giving***: 2011
- Credit2 Cap**: 25,000.00
- Owner Usergroup**: CO (dropdown) SGHE
- Active**
- Hierarchy Order**: 0

TMS Maintenance Setup (tms_record_type)

The tms_record_type view allows you to indicate which entities, based on their record type, are eligible to receive Credit2 amounts. For example, if the Credit2 check box for the record type of AL (Alumnus or Alumna) is checked, entities with this record type are allowed to receive Credit2 amounts. If the Credit2 check box for the record type of FR (Friend) is not checked, entities with this record type are not allowed to receive Credit2 amounts.



Note

If an entity has multiple record types, some of which are eligible to receive Credit2 and some of which are not, Advance uses the primary record type for that entity (entity.record_type_code) to determine Credit 2 eligibility.

To indicate which record types are eligible for Credit2:

1. From the Main Menu click Go To.
2. Select TMS Edit Code Table List and click Go.
3. Drill-down on the Record Type view.
4. Select the record type code from the list.
5. Check or uncheck the Credit2 check box as applicable.
6. Click Save on the Form Header.

The screenshot shows the 'TMS Edit Code Table' interface. At the top, there is a header 'TMS Edit Code Table' with an 'Actions' link. Below this is a sub-header 'TMS Code Definition' and 'Record Type Table (tms_record_type)'. A secondary header 'TMS Codes (1/21)' includes 'Save', 'New', 'Actions', and 'Help' options. The main area contains a table with two columns: 'Record Type Code' and 'Short Desc'. The table lists several record types: AL (Alumnus or Alumna), CF (Corporate Foundation), CP (Corporation), CS (Fund Raising Consortium), DB (DAF - Business), and DO (DAF - Other Organization). Below the table is a form for editing the selected record type 'AL'. The form fields include: 'Record Type Code*' (AL), 'Short Desc*' (Alumnus or Alumna), 'Entity Type' (Y, Alum), 'Cfae Code' (A, Alumni/ae), 'Rec Priority' (1), 'Default' (Person Or Org, checked), 'Class' (1, Require), and 'School' (1, Require). The 'Credit2' checkbox is checked and highlighted with a red box.

Record Type Code	Short Desc
AL	Alumnus or Alumna
CF	Corporate Foundation
CP	Corporation
CS	Fund Raising Consortium
DB	DAF - Business
DO	DAF - Other Organization

Record Type Code*	AL
Short Desc*	Alumnus or Alumna
Entity Type	Y Alum
<input checked="" type="checkbox"/> Credit2	
Cfae Code	A Alumni/ae
Rec Priority	1
Default	<input checked="" type="checkbox"/> Person Or Org
Class	1 Require
School	1 Require

Entering Credit2

When you access the Gift Details form, Advance does not know the ID of the entity to receive credit for the transaction and cannot determine whether the Credit2 field should be available to the entry operator. Thus, the Credit2 field does not appear on this form by default. When the ID of an entity with a record type eligible to receive Credit2 amounts is entered in the Donor field, and you navigate to a different field, the Credit2 field appears and transaction entry can occur.

To enter a transaction with a Credit2 amount on the Gift Details and Associated Donors forms:

1. Click New Gift on the Gift Batch Profile Page Tree.
2. Enter the ID Number of the donor eligible to receive Credit2, in the Donor field. Eligibility is based on the entity's primary record type (where `tms_record_type.credit2_ind = Y`).
3. Navigate to a different field and the Credit2 field appears directly to the right of the Pledge field. This field does not appear until you enter the ID of an entity eligible to receive Credit2.
4. Update the Credit2 amount, as applicable. By default, the legal/hard credit assigned to the primary donor in the Amount field automatically populates in the Credit2 field.
5. Enter additional information for the transaction, including the minimum required information as noted by the asterisks.
6. Click Save.

Gift		Actions	
Gift Batch #	101648 (Open)	Add Date	Apr 07, 2011
User Group	SGHE	Operator	advwork
Mod Date	Apr 07, 2011		
Gifts	Pledges	Matching Gifts	Reversals
1	0	0	0
Modifications			
0			

Gift Summary		Actions	
Primary Donor	! Mr. Chad Carver #100689 (+76 %84 *92 B96 !03 *07)	Associated Donors (1)	
Receipt #	106609	Gift Details	
Record Date	Apr 07, 2011	Trans Type	Gift
Legal Amt	500.00	Pmt Type	Check/Cash
Allocation	Annual Fund	Premiums (0)	

Gift Details		Actions	
Save		Cancel	
Help		New	
Donor*	100689 ! Mr. Chad Carver (+76 %84 *92 B96 !03 *07)	Acknowledgments (0)	
Allocation*	ANNUAL FUND Annual Fund	Giving Codes (0)	
Trans Type*	GF Gift	Claims (0)	
Amount	500.00	Tender*	C Check/Cash
Soft Credit	500.00	Check #	
Record*	04/07/2011	Receipt	04/07/2011
<input type="checkbox"/> Payment <input type="checkbox"/> Joint <input checked="" type="checkbox"/> Annual		Deposit Date	
Pledge		Credit2	500.00
Proposal		Fee	Y Yes
Campaign		Appeal	
Purpose	CB Campus Beautification	Program	BRM Bricks and Mortar
School	AS College of Arts and Sciences	Class	1980

7. Optionally, click the Associated Donors hyperlink in the Gift Summary form.
8. Add associated donors and update the Credit2 amount for the associated donors, as applicable. As with the Gift Details form, the Credit2 field only appears when an entity is eligible, based on the entity's primary record type. By default, Advance assigns Credit2 (for donors who qualify for Credit2) equal to the amount of legal credit recorded on the Associated Donor row.
9. Click Save.

Gift Summary
⌵

Primary Donor [! Mr. Chad Carver #100689 \(+76 %84 *92 B96 !03 *07\)](#) Associated Donors (2)
Gift Entry [Gift Details](#)
Receipt # 106609 [Premiums \(0\)](#)
Record Date Apr 07, 2011 **Trans Type** Gift
Legal Amt 750.00 **Pmt Type** Check/Cash
Allocation Annual Fund

Associated Donors (1/2) Save New Cancel [Actions](#) [Help](#)
⌵

Name	Amount	Allocation	Association
Ms. Alexandra Blanche Carver	250.00	ANNUAL FUND	Group Donor
! Mr. Chad Carver	500.00	ANNUAL FUND	Primary

Donor [Ms. Alexandra Blanche Carver](#)

Allocation* Annual Fund

Amount*

Assoc Type* Group Donor

Soft Credit

Appeal

[Acknowledgments \(0\)](#)
[Giving Codes \(0\)](#)
[Claims \(0\)](#)

Allocation Fee Yes

Deposit Date Annual

Credit 2

Program Bricks and Mortar

Note

If the primary donor is linked to a spouse entity with whom they have Joint Giving, Advance enters the appropriate Credit2 amount in the Associated Donor row created for the spouse entity.

Note

If Credit2 is enabled, but the donor is not eligible based on their entity record type, the Credit2 field does not display and the entity will receive a Credit2 amount of 0.

Technical

Before a transaction with a Credit2 amount is processed and while it is still in a batch, the amount is stored in `bg_associated_donor.bg_credit2_amt`. After a transaction with a Credit2 amount is processed, the amount is moved to `gift.gift_credit2_amt`. Since this functionality was first introduced to the Advance database when it was included in a prior release of Advance Windows, these fields are not new in this release and no changes were made to the Advance database in Advance Web 9.7.0.0 in order to accommodate this feature.



Modifying Credit2 amounts

If you access a batch and open an existing gift, gift modification, or add a new modification to the batch, and the primary donor has a primary record type that qualifies them for Credit2, the Credit2 field displays the amount that corresponds to the Credit2 associated with the primary donor row of the transaction.

If you change the legal/hard credit amount, or adjust the transaction in such a way that changes the amount, Advance Web behaves as follows:

- If the Credit2 amount is the same as the donor's assigned legal/hard credit, based on the amount before the change, Advance will adjust the Credit2 to be the legal/hard credit assigned to the donor based on the new amount entered.
- If the Credit2 is not the same as the donor's assigned legal/hard credit, based on the amount before the change, Advance will recognize the amount was overridden and will not adjust the Credit2 amount and will retain the overridden amount.

Processing and viewing Credit2 amounts

When a batch is closed and submitted for processing, Gift Processing examines the Credit2 Cap for the fiscal year in order to determine whether the full Credit2 amount can be applied to the donor. If the Credit2 Cap has not been reached, the full amount is applied. If the cap is already reached, or if part of the transaction will reach the cap, the Credit2 amount will be modified as necessary.

For example, let's say the Credit2 Cap is 25,000 and the entity already has a Credit2 amount of 24,000 in the fiscal year. If the entity then makes a gift of 5,000, the Credit2 amount will be decreased to 1,000 in order to reach the cap. If the full amount of 25,000 was reached prior to this transaction, this and all subsequent transactions in the fiscal year for the entity will be automatically decreased to 0 by gift processing.

When the Credit2 Cap is reached for an entity in a fiscal year and gift processing decreases all subsequent Credit2 amounts, the amount visible on the applicable Giving Summary and Overview forms in Advance will reflect the amount calculated by Advance, not the amount entered by the gift entry operator. Thus, if the cap of 25,000 is reached and a new transaction of 5,000 is entered, when the transaction is processed and viewed on the Giving Summary form, the Credit2 amount will reflect 0, as calculated by Advance, not the 5,000 entered by the gift entry operator.

Pledge receipt dates

This enhancement provides you with the ability to specify a Date of Receipt for pledge transactions, in the same fashion as entering a Date of Record for gift transaction. This functionality further aligns Advance Web with Advance Windows, as this functionality is now available on both platforms. This field is available on the Batch Pledge Details, Pledge Overview, Pledge Reversal Overview, Pledge Lookup and GiftLoader Defaults forms.



Note

The functionality described in this section was first introduced to the Advance database when it was included in a prior release of Advance Windows. As such, no changes were made to the Advance database in Advance Web 9.7.0.0 in order to accommodate this feature.

Batch Pledge Details

When you select New Pledge from the Gift Batch Page Tree or reverse or modify a pledge, the Pledge Details form allows you to enter the details of the transaction, including the new Receipt Date, which is required. For pledge reversals, the Receipt Date field displays, but like other fields on the form, can not be modified.

If you specify a Receipt Date in Batch Defaults, the date will default in this new Receipt field. If you do not specify a Receipt Date in Batch Defaults, Advance populates this field with the current date.

Pledge					Actions
Gift Batch #	102509 (Open)	Add Date	05/03/2011	Mod Date	05/03/2011
User Group	SGHE	Operator	qatestawa97		
Gifts	Pledges	Matching Gifts	Reversals	Modifications	
0	1	0	0	0	

Pledge Summary					
Primary Donor	# Mr. Chad Carver #100689			Associated Donors (1)	
Pledge #	106477			Scheduled Payments (1)	
Record Date	05/03/2011	Trans Type	Straight Pledge		Pledge Details
Legal Amt	100.00	Frequency	Annual		Premiums (0)
Discounted Amt	0.00				
Allocation	Annual Fund				

Pledge Details					
Donor*	100689	# Mr. Chad Carver		Acknowledgments (0)	
				Giving Codes (0)	
Allocation*	ANNUAL FUND	Annual Fund			
Pledge Type*	ST	Straight Pledge	Ant Match	0.00	
Amount*	100.00		Pay Date	05/03/2011	
Frequency*	A	Annual # Yrs 1	Pledge Status	A Active	
Pay Amt	100.00		Record*	05/03/2011	
Receipt *	05/03/2011		Soft Credit	100.00	
<input type="checkbox"/> Binding	<input type="checkbox"/> Recordable		Discount	0.00	
<input type="checkbox"/> Joint	<input checked="" type="checkbox"/> Annual		Proposal		
Campaign			Appeal		

As part of this new functionality, the Ant Match field now appears above Pay Date and Record now appears below Pledge Status (where Ant Match was previously located).

Additionally, please note the following:

- Receipt Date does not appear on the Pledge Associated Donors form and the Receipt Date entered on the Pledge Details form applies to all donors associated with the transaction, including spouse's associated donor rows. When you add or modify the Receipt Date on the Pledge Details form and click Save, Advance stores the same Receipt Date on all associated donor rows.
- If you delete the value in Receipt Date and save the transaction, Advance will indicate the date is a required field and a value must be specified.
- You must enter a valid date in this field. If you enter an alphabetical character or an invalid date, you will receive an error until you enter a valid date. If you adjust the Receipt Date for a pledge and save the pledge, Advance writes the revised Receipt Date value to all associated donor rows for the transaction. This applies to new (unprocessed) pledges as well as those being modified.

Primary Pledge Overview

The Pledge Associated Donors form in the Primary Pledge Overview provides you with the ability to view the details of posted (processed) pledges, including the new Receipt Date entered during Pledge Entry.

When you access the Primary Pledge Overview, the last form on the bottom is the Pledge Associated Donors form. Included on this form is a section of information for each donor associated with the transaction and in each section is the Receipt Date field.

If you are viewing information on a pledge that was entered prior to Advance Web 9.7.0.0, before the addition and enforcement of this value, the Receipt Date label will appear with no value.

Pledge Associated Donors (1/1)		Actions Help	
Donor	# Mr. Chad Carver #100689	Campaign	
Association	Primary	Allocation	ANNUAL FUND
Actual	100.00	Appeal	
Credit	100.00	Purpose	Campus Beautification
Fund		Date of Record	05/03/2011
Account	12345	Receipt Date	05/03/2011
Class		Program Credit	Business School
School	Arts and Sciences	Entity Type	Alumnus Alumna
Campus	Downtown-City Center	Dept	Art Acquisition
Reunion		Sub Dept	
Agency	<input checked="" type="checkbox"/> Alloc Fee Chancellor's Office		
Alloc School			
Alloc Division	Community College Program <input checked="" type="checkbox"/> Annual		



Note

The same functionality is available on the Pledge Reversal Overview.

Pledge Lookup form

In addition to viewing and maintaining Receipt Date information, you can also perform a Pledge lookup using the Advanced Pledge Lookup form, which contains new Receipt Date lookup field.

Pledge Actions

1. Choose a template (optional)
2. Select results format*
3. Select output type*
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Pledge Help

Pledge Number	=	<input type="text"/>
Allocation Code	=	<input type="text"/>
Allocation Account	=	<input type="text"/>
Allocation School	=	<input type="text" value="(All)"/>
Special	=	<input type="text" value="(All)"/>
Campaign	=	<input type="text" value="(All)"/>
School	=	<input type="text" value="(All)"/>
Campus	=	<input type="text" value="(All)"/>
Anon	=	<input type="text" value="(All)"/>
Type	=	<input type="text" value="(All)"/>



Annual	=	<input type="text" value="(All)"/>
Fund Name	=	<input type="text"/>
Receipt Date	=	<input type="text" value=""/> <input type="button" value="Calendar"/>
Transmit	=	<input type="text" value="(All)"/>
Reporting	=	<input type="text"/>
LM	=	<input type="text"/>

GiftLoader

With the addition of the required Receipt Date on pledge transactions, GiftLoader now requires entry of a Receipt Date when loading pledges.

Technical

For each bpe_associated_donor row created by GiftLoader, Advance places the date specified in the Run Defaults in bpe_associated_donor.receive_date.

iModules Encompass one-time gift support

This release contains functionality that allows Encompass Online Gift Transactions to be processed by institutions and organizations licensed for Gift Maintenance in Advance Web.

Note

At this time, recurring gift, pledge and pledge payment functionality is not supported.

One-time Gift Transactions entered through Online Giving are brought in and grouped together in batches at the same time Bio-Demographic changes are brought in from Encompass. These Online Gift batches can be reviewed using Batch Control and the Gift Batch Transaction List. When a transaction from Online Giving without an Advance Entity ID is encountered (unauthenticated donor), F2 lookup functionality allows you to search the database to locate the donor's Entity ID in order to ensure the transaction is properly associated with the donor and the donor is properly credited for the transaction. New Entity IDs can be created for processing gifts from donors new to Advance.

Note

The following Encompass processes are not compatible with this Advance release.

- Identity Checkpoint
- Member Merge
- Skip Billing

Please contact your iModules representative for more information on these processes. As mentioned above, Advance 9.7.0.0 has functionality to search for unauthenticated donors coming from Encompass gift transactions. It will search for a match to existing entities in the Advance database. Whereas Identity Checkpoint is not available with this release, this search functionality will reduce the number of unauthenticated donors being added to the Advance database.

Encompass data pulls

Previously, the Encompass Connector Service Configuration Utility was used to set up the schedules for pushing data to and pulling Bio-Demographic data from Encompass. Data pull now includes one-time gift transactions, which are stored for gift processing batches in a new table, `imodules_download_gift`. Manual push/pull operations can be performed using the Advance Web Encompass Connector. After processing, gift transaction Information about non-processed Encompass gift transactions is stored in `'imodules_download_gift'` and `'imodules_download_giftalloc'`. Information about processed Encompass gift transaction is stored in `'imodules_download_gift_bk'` and `'imodules_download_giftalloc_bk'`.

For information on setup and use of the Encompass Connector Service Configuration Utility and the Advance Encompass Connector, please refer to the *Advance Web Integration Reference*.

Warning

If you are currently using AWC, existing AWC gift batches must be closed and processed prior to migrating to Encompass to avoid having gift data from Encompass appended to the open AWC batches.

Allocations

Donors in the Encompass Online Community have the ability to make one-time gifts to the Designation (Allocation) or Multiple Designations of their choice. Gifts will be accepted from both authenticated and unauthenticated Encompass donors.

As a part of this Encompass one-time gift feature, a script is provided to extract `allocation_code`, `short_name` and `long_name` values from the Allocation table in your Advance database to a .csv file for uploading to Encompass. The active allocations from this file are used to populate the Encompass Designation ID field. Please contact your iModules representative for more information on integrating this information with your existing Encompass data.

Encompass gift processing forms

Encompass donors are presented with four forms, in the following order, when they make a gift:

- Campaign
- Billing
- Confirmation
- Finish

When the donor completes entry of information on the forms and the gift is completed, they will be sent a confirmation email.

The Campaign form is configurable. The only fields required are First Name, Last Name, Email and Gift Amount, but optional fields can be added to capture additional donor information, such as donor address, class year, school, designations, Joint Donor Name, In Honor and In Memory tributes, and Matching Company Names. Some of this information can be valuable when trying to match unauthenticated donors to existing Advance entities. Your institution or organization can decide which fields display on this form and if they are optional or required.

The Campaign form currently does not pass any information to the Billing form, so the donor must enter their billing address, i.e., if you decide to add address fields to the Campaign form, information entered in these fields will not default from the Campaign form into the Billing address fields. However, Advance will use the address information on the Campaign form to search for unauthenticated donor matches in the Advance database. If an address is not entered or available on the Campaign form, Advance will use the billing address entered on the Billing form to search for a donor match.

Joint Donors

Currently, Encompass does not have relationship functionality. This means a Constituent ID for a joint donor cannot be passed to Advance. An optional field can be added to the Encompass Campaign form to capture the joint donor name. This name can be passed back to Advance and will be placed in the comment section on the gift entry. A gift processor will then have to manually add the joint donor to the gift.



In Honor and In Memory Gifts

As mentioned above, optional fields can be added to the Encompass Campaign form to capture In Honor and In Memory information. This data can be passed back to Advance and will be placed in the comment section on the gift entry. A gift processor will then have to manually add these donors to the gift.

Employer Match

As mentioned above, optional fields can be added to the Encompass Campaign form to capture Employer information. This data can be passed back to Advance and will be placed in the comment section on the gift entry. If the employer passed back to Advance was searched for and selected from Encompass HEP functionality, the comment will note that fact. A gift processor will then have to manually create the claim.

System option changes

The addition of Encompass Online Giving functionality required the addition of a new system option and the modification of several existing system options. Because some AWC (Advance Web Community) system options already met the needs of Encompass, they were modified and had their functionality extended to include Encompass Online Giving in Advance Web 9.7.0.0. The values in these system options assist in the creation of batches and gift entries, and can be accessed via the Configuration Utility using the Web > AWC Admin > System Options menu. These system options are now categorized as 'Online Giving Options':

AWC System Option 26 - Giving Options Appeal Code

The use of this system option is not required. It is used to indicate the default appeal code for gifts made through Online Giving. This must be a valid value in the `appeal_header` database table.

AWC System Option 27 - Giving Options Campaign

The use of this system option is not required. It is used to associate a default campaign code for gifts made through Online Giving. This must be a valid value in the `tms_campaign` table. This may be valuable to institutions or organizations that decide not to create campaigns in Encompass and want to associate these gifts to a particular campaign.

AWC System Option 28 - Giving Options Credit Card Tender

The use of this system option is required. It is used to populate the gift entry for all gifts made through Online Giving. This must be a valid value in `tms_payment_type`.

AWC System Option 33 - Giving Options Gift Transaction Type

The use of this system option is required. It is used to indicate the default gift transaction type for all online gift transactions. This must be a valid value in `tms_transaction_type`.

AWC System Option 34 - Giving Options Operator Name

The use of this system option is required. It is used to indicate the default operator name for gift transactions made through Online Giving. It is validated against `zz_user`.

AWC System Option 37- Giving Options User Group

The use of this system option is required. It is used to populate the batch control and gift entry user group for gift transactions made through Online Giving. It is validated against `zz_usergroup`.

AWC System Option 146 - Associated Code for Multiple Allocation

This system option is required if campaigns are set up in Encompass with more than one designation. The value in this field populates the associated donor type rows on a gift with a single donor with multiple designations.

AWC System Option 155 - Unauthenticated Operator Name

This system option is only required if Advance System Option 108 is populated. If it is populated, unauthenticated gifts are separated from authenticated gifts and placed in their own gift batch. The value in this system option indicates the operator name that will be associated with all unauthenticated donations made via Online Giving. This must be a valid value in `zz_user` and must be set upon initial installation.

AWC System Option 156 - Unauthenticated User Group

This system option is only required if Advance System Option 108 is populated. If it is populated, unauthenticated gifts are separated from authenticated gifts and placed in their own gift batch. The value in this system option is used to indicate the user group you wish to associate with all unauthenticated donations made via Online Giving. This must be a valid value in `zz_usergroup` and must be set upon initial installation.

A new **AWC System Option 184**, Allocation Default, will use the defined value for Encompass transactions when the allocation field is empty when pulled. This system option is required for institutions or organizations opting not to require or enabling designations in Encompass. If designations are enabled or required in Encompass, this system option can retain its default, which is blank. This value is validated against the Allocation table.

Advance system options used by Encompass

The functionality of several Advance system options was extended for use with Encompass Online Giving. The settings of these system options provide flexibility and will affect the way in which gifts are entered into Advance Web. Modifications to these system options are made in the Configuration Utility using the Tools > Admin > System Options menu:

System Option 85 – Unauthenticated Donor ID

This system option identifies the Entity ID to be associated with all transactions made by donors that are not known by the Online Community Website, i.e., unauthenticated donors. Since the system does not know the Entity ID of the donor, this temporary number is necessary in order to associate an Entity ID with the transaction. After transactions with this ID are created, the transactions should be viewed in the Gift Batch Transaction List and the appropriate Entity ID should be associated with the transaction in order to ensure the correct donor is credited. You

may, for example, create an entity with the name “Unauthenticated Online Donor” and place that Entity ID number in this system option.

 **Warning**

By default, the value of this system option is set to ‘000000001’, which should be replaced with the Entity ID of the new entity you create to associate with unauthenticated online donors.

System Option 86 – Allow Deletes on Ledger

This system option is not required. It indicates whether you wish to allow users to delete Encompass gifts (gifts or pledges if using AWC) while in the Gift Batch Transaction List, which were made to your institution through the Online Community application. By default, this system option is set to ‘N’, which indicates you do not wish to allow online gift deletes within the Gift Batch Transaction List. Setting the value to ‘Y’ indicates you wish to allow online gift deletes within the Gift Batch Transaction List.

System Option 87 – Allow Modifications on Ledger

This system option indicates whether you wish to allow users to modify gifts or pledges, while in the Gift Batch Transaction List, which were made to your institution through the Online Community application. Default setting is ‘0’, which indicates you do not wish to allow users to modify the following Gift Batch Transaction List values when working with online gift transactions:

- Primary Amount
- Donor Amount
- Transaction Type
- Check #
- Tender

A setting of ‘1’ indicates you wish to allow online gift transactions to be modified in the Gift Batch Transaction List. A setting of ‘2’ indicates you do not wish to allow users to modify any of the Gift Batch Transaction List values when working with online gift transactions. The only exception would be allowing the user to perform an F2 look-up on the Donor field. All other fields will be display only (flattened) for this type of gift.

 **Warning**

A value 2 does not allow the addition of associated donor rows and should not be used until Encompass has relationship functionality in place.

System Option 88 – Number of Transactions in Online and Gift/Pledge Loader Batches

Depending on the value of this system option, a specific number of transactions may be stored in batches unique to Online Giving. For example, if this system option is set to 25 (default setting), and 75 transactions are entered, 3 individual batches will be created to contain all of the Online Giving transactions.

When the number of transactions specified in this system option is reached, Advance will automatically change the status of the existing batch to 'Web Pending' to indicate the batch is full and ready to be reviewed. Advance will then create a new batch when the next Online Giving transaction(s) are made. This option is also used for Gift/Pledge Loader.

System Option 108 - 'Online Batch Type'

The code in this system option determines which batch type code will be assigned to batches that are created in Advance as a result of gifts made through an online community. The value defined must be a valid value in `tms_batch_type`. The default is blank.

When this value is left blank or is set to 'W' (Online Community Transactions), all authenticated and unauthenticated gift transactions from Encompass will be in the same batch with a batch type of 'W'. When the field is populated with a value other than blank or W, authenticated gift transactions will be in a batch with the value specified and unauthenticated online gifts will be in a batch with the type 'W'. Populating this system option with a value other than blank or 'W' separates authenticated transactions from unauthenticated transactions and places them in the appropriate batches.

Duplicate Batches

This new Online Gift functionality also allows for the identification of duplicate transactions which may be pulled from Encompass either via the Encompass Connector Configuration Utility or Encompass Connector in Advance Web. This could happen if multiple manual pulls occurred with date ranges overlapping previous pulls. When duplicates are detected, they are placed in a separate batch (Batch Type 'X', Online Duplicate Batch) with the original Batch Number and Receipt Number noted in the comment section of the gift entry. Batches with duplicate transactions can be reviewed and, if appropriate, processed or removed.


TMS changes

The following changes to TMS views are in this release:

- `tms_credit_card_auth_source` had the 'Use for AWC' indicator changed to 'Use for Online Giving'.
- `tms_gift_src_info` had the 'Use for AWC' indicator changed to 'Use as source for Online Giving'.
- `tms_credit_card` is now a complex table and has a new field 'Online Giving Card Type'. Because Credit Card types coming from Encompass are hard-coded values of VISA, MC, DISC and AMEX, this new field is used to translate the Encompass hard-coded value to the Card Type Code used for the gift's tender detail.
- `tms_batch_type` has a new required code 'X' – 'Online Duplicate Transactions' which is used by Advance when duplicate transactions are pulled from Encompass. Also, the description of code 'W' was changed to 'Online Community Transactions'.

Setup checklist

The following checklist provides a quick view of system setup prior to accepting and processing online gifts from Encompass. For information on setting system options, please refer to the *Advance Configuration Utility User Guide* and the *System Options Reference* documents.

1. Set the iModules username/password in web.config
 -  **Technical:** https://admin.imodules.com/ws_20/controlquery.aspx must be entered in the Encompass Connector Service Configuration Utility > Settings > URL field. This is the same value entered in the web.config file for iModules integration.
2. Verify that one entry in tms_gift_src_info has the 'Use as source for Online Giving' indicator checked
3. Verify that one entry in tms_credit_card_auth_source has the 'Use for Online Giving' indicator checked
4. Populate the Online Giving Card Type field for each tms_credit_card code that is provided through Encompass
5. Verify that an Unauthenticated Donor entry exists in Entity table and that the ID for that entity is set in System Option 85
6. Review and set, as appropriate for your institution or organization, the following system options:
 - AWC System Option 26 (Giving Options Appeal Code)
 - AWC System Option 27 (Giving Options Campaign)
 - AWC System Option 28 (Giving Options Credit Card Tender)
 - AWC System Option 33 (Giving Option Gift Transaction Type)
 - AWC System Option 34 (Giving Options Operator Name)
 - AWC System Option 37 (Giving Options User Group)
 - AWC System Option 146 (Associated Code for Multiple Allocation Associated Rows)
 - AWC System Option 155 (Unauthenticated Operator Name)
 - AWC System Option 156 (Unauthenticated User Group)
 - AWC System Option 184 (Allocation Default)
 - System Option 85 (Unauthenticated Donor ID)
 - System Option 86 (Allow Deletes on Ledger)
 - System Option 87 (Allow Modifications on Ledger)
 - System Option 88 (Number of Transactions in Online and GiftLoader Batches)
 - System Option 108 (Online Batch Type)
 - System Option 340 (iModules Service Running – display only, review value only)

Online Gift Batches

When a gift is made through Encompass Online Giving and pulled into Advance, the information is stored in the Advance imodules_download_gift and imodules_download_giftalloc tables until the gift transactions are processed via gift processing. Once the information is accessed via the gift batch transaction list, you will be allowed to finalize the gift before submitting it for gift processing. In the case of an unauthenticated gift made through Online Giving, in addition to verifying the gift attribute information, it will be the responsibility of the gift entry operator to locate the entity in the database or create the entity before submitting the transaction for gift processing. After processing, a record of all Encompass gift transactions is stored in the 'imodules_download_gift_bk' and imodules_download_giftalloc_bk tables.

Once transactions are entered through Online Giving you will be required to review the transactions in Advance before submitting them for gift processing. Within Gift Batch Control, an Online Giving specific batch will be created by Advance and will contain the transactions that were made via Online Giving. Because these transactions were made online, the newly created batch in Advance will contain a Batch Type equal to the value and functionality set by System Option 108 (Online Batch Type), and a batch Status code of 'O'. The Batch Type code indicates that the transactions were an Online Community Transaction, and the batch Status code indicates that the batch is an 'Open' batch.

The screenshot shows the 'Batch Details' form with a blue header bar containing 'Save', 'Cancel', 'Actions', and 'Help' buttons. The form fields are as follows:

Status	<input type="text" value="O"/>	▼ Open	Bursar Batch #	<input type="text"/>
Batch Type	<input type="text" value="W"/>	▼ Online Community Transactions	Deposit Date	<input type="text" value="06/15/2011"/>
Sprv StatusLast Mod	<input type="text"/>			
Sprv Status	<input type="text"/>			

A red box highlights the Status and Batch Type fields.

Any Online Giving batch will have a status of 'Open' until the maximum number of transactions is reached for the batch, as specified in System Option 88. By default, System Option 88 is set to allow a maximum of 25 transactions in each batch. When the maximum amount of transactions is reached, Advance will automatically change the status of the batch to 'W' indicating that the batch is 'Web Pending'. Additionally, Advance will create a new Open 'Web' batch the next time a gift or pledge is entered online. The status of 'Web Pending' is a code that Advance uses to indicate that the batch is full and can no longer accept any new online transactions.

Once a batch has been set to 'Web Pending', you may 'Open' and review the batch. Additionally, if you do not wish to wait for the maximum number of transactions to be reached before reviewing and processing the information in the batch, you may access the transaction list by opening the batch and reviewing the transactions before submitting the batch for gift processing.

The screenshot shows the 'Batch Details' form with a blue header bar containing 'Save', 'Cancel', 'Actions', and 'Help' buttons. The form fields are as follows:

Status	<input type="text" value="W"/>	▼ Web Pending	Bursar Batch #	<input type="text"/>
Batch Type	<input type="text" value="W"/>	▼ Online Community Transactions	Deposit Date	<input type="text" value="06/15/2011"/>
Sprv StatusLast Mod	<input type="text"/>			
Sprv Status	<input type="text"/>			

A red box highlights the Status field.

When the maximum amount of transactions is reached and you wish to review the transactions in the batch, change the status of the batch from 'Web Pending' to 'Open'. This will allow you to access

and verify the transactions. It is important to note that you cannot access the transactions for a batch that has a status of 'Web Pending'. You can only access the transactions when working with an 'Open' batch. When you are ready to work with an 'Open' batch, access the transactions and you will see the gift information exactly as the online donor entered it. In the case of an unauthenticated gift, you also need to authenticate the donor, i.e., you will need to locate the entity within the database and associate the donor with the transaction, or if they do not exist in the database, you may create them. Once you change the status of the batch from 'Web Pending' to 'Open', it cannot be changed back to 'Web Pending'.

Outstanding Pledge Payment Match

Currently, Encompass does not have pledge payment functionality. Due to this, a check has been added to batches created for Encompass. This check will verify if any of the gift entries in the batch correspond to an entity's existing pledge. If there is a match, a warning message will be displayed to the gift processor to view the Validation Report, which identifies matches to existing active pledges or to pledges that are in a batch for processing. The gift processor will then have to determine if the gift should be applied as a payment instead. These messages in the Validation Report are warnings and will not prevent the batch from being processed.

Online gift processing

After you set up the system options and create a new entity for Unauthenticated Online Gifts, gift processing for Online Giving can proceed. At the time the transaction is created, Advance will either create a new batch unique for the online gift transaction or use an existing Online Giving batch that has not reached the limit specified in System Option 88. For a new Online Giving batch, Advance will assign a Batch Type determined by the value and functionality of SO 108, indicating it is an Online Community Transaction Batch and set the status of the batch to 'Open' to indicate the batch has not reached the maximum number of Online Giving transactions. When Advance identifies a duplicate transaction, it will be placed in a separate batch with a Batch Type of 'X', Online Duplicate Batch.

To view details about gifts made through Online Giving:

1. Access Gift Batch Control for the batch that contains the Online Giving transactions.
2. Select Transaction List from the page tree and you can view transaction information exactly as entered by the Online Giving donor.



Note: Depending on the settings of System Options 86 and 87, deletes or modifications may or may not be allowed, for example, if System Option 87 is '0':

- If the Gift Detail Amount for an Online Donor or an Online Associated Donor is modified, an error message displays: "Amount – This is an online community transaction. The amount cannot be modified".
- If the Gift Detail Check Number is modified, an error message displays: "Check # – This is an online community transaction. The check number cannot be modified".
- If you attempt to modify the Gift Detail Tender field, an error message displays: "Tender – This is an online community transaction. The tender cannot be modified".

3. Review the gift information. Joint Gifts, In Memory/In Honor Gifts and Matching Gifts will be

identified in the Comment field and must be manually entered.

4. If an unauthenticated online user made the gift, you must search your Advance database to see if the gift donor is an existing entity in your database. To perform an entity search based on information that was entered online, press F2 while current in the Donor field on the transaction in the Gift Batch Transaction List and the Entity Lookup window displays. The entity name and address information entered by the donor defaults in the fields. Unauthenticated donors will have a record type of 'Friend'. Look at the Comment field for additional information about the donor. To initiate the search on those criteria, click OK.
5. If the entity you are looking for does not display in an Entity Lookup List, a dialog displays. Click OK to create the entity according to the policies and procedures at your institution or organization.



Note: If you do not have the appropriate security rights for adding an entity, a second dialog will display indicating you cannot add the entity.

6. In the event that multiple entities with the same name match the specified criteria, the Entity Lookup List will display the possible matches. Scroll through the list to select the appropriate entity for the transaction.
7. After you determine which entity is to be credited with the gift, selecting the entity will populate the Donor Name and ID in the transaction detail.
8. Review additional information about the transaction.
9. Click Save on the form header.
10. When all transactions are reviewed and any modifications completed, the batch can be validated, closed and processed.



Note: If you attempt to close the Online Batch without assigning the Unauthenticated Online Gift transaction to the appropriate Advance entity or entities, a warning message will display to indicate an Online Unauthenticated Donor ID exists in the batch. A valid Entity ID must be assigned to the transaction before you can close the batch. For additional information on processing Online Giving Transactions, please refer to the *Advance Web Gift/Pledge User Guide*.

Reporting

Context-Sensitive Gift and Pledge Reports

Advance Web includes context-sensitive reports, which are reports that include data for a current context. Context-sensitive reports are accessible from a form's Reports list when the form displays the corresponding type of data. For example, the Entity Profile Report contains a Lookup Type of Entity and a Report Group of Context Sensitive Report. This means the Entity Profile Report is available when you are on an application that includes the Entity ID or any form, clipboard or lookup result, where the record can be tied to one or more Entity IDs.

Effective with this release, context-sensitive reports were expanded from Entity, Program Prospect, Proposal or Prospect to also include Gift and Pledge.

To make a report context sensitive using the new Gift and Pledge contexts:

1. Log into the Advance Configuration Utility.
2. From the Main Menu select Web, Web Admin then Reports.
3. Click New when the Web Reports Maintenance window appears.
4. Enter the Name of the Report along with additional information where appropriate, including at least the required information, based on the type of report.
5. In the Lookup Type drop-down, select either Gift or Pledge, to indicate the context.
6. Click Insert in the Report Groups pane and select a Report Group of Context Sensitive Reports.
7. Click Insert in the Report Security pane and grant and/or deny security to Rights Groups. The report will not be visible to users if you do not grant access to the report.
8. Click Save.

The screenshot shows the 'Web Reports Maintenance' window. The 'Report' pane on the left lists various reports, with 'Dean's Gift List' selected. The main form contains the following fields:

- Report ID:** 1005
- Report:** Dean's Gift List
- Report System:** Web Form
- Description:** List of gifts to be reported to Dean's office
- Type:** Reports
- Sub Type:** (empty)
- Owner:** SCHE
- Apply Entity Exclusion Rules:**
- Application:** Dean's Gift List (100003)
- URL Page:** DeanGiftList.aspx?pageid
- Lookup Type:** Gift (highlighted with a red box)
- Output Type:** (empty)
- Comment:** (empty)

The 'Report Groups' section has an 'Insert' button and a table with one entry:

Report Group	Added	Last Modified	By
Context Sensitive Reports	4/26/2011 16:13	4/26/2011 16:13	qat

The 'Report Security' section has an 'Insert' button and a table with one entry:

Rights Group	Added	Last Modified	By
Default Inquiry	4/26/2011 16:13	4/26/2011 16:13	qat

To run a Gift or Pledge context-sensitive report in Advance Web:

1. Access the form, clipboard or lookup result where the record can be tied to one or more Gifts or Pledges.
2. Select Actions then Reports from the Form Header.

Giving Summary 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)
 Married: # Mrs. Samantha Carver #100690

Giving Summary ON***

Lifetime Giving		Annual Giving	
Total Actual	375.00	Number of Years	1
Total Credit	400.00	Annual Credit	250.00
Largest Gift	150.00	Largest Annual Gift	150.00
Overall Balance	400.00	Total Credit 2	375.00

3. Click the ellipsis button on the row to select the report from the Report List.

Report List Actions

This is the list of reports that apply to your current context. When you run a report from this list, the report generated will be for the specific records you are viewing.

Report List Actions Help

	Context	Name	Description
...	Gift	Dean's Gift List	List of gifts to be reported to Dear
...	Entity	Entity Profile Report	Profile reports about entities
...	Entity	Google Entities	Map selected entities with Google E
...	Entity	Labels	Create mailing labels
...	Entity	Merge	Create Merged Document
...	Entity	NameTag and TentCard	Produces a printable NameTag anc

4. Run the report when prompted.

Note

In the graphic above, both Gift and Entity contexts appear in the Report List. This is due to the record being tied to both a Gift and Entity ID. Some forms, such as the Transaction List, can have both Gift and Pledge-related records. In these instances, the context specified for the report is the deciding factor as to what to include on the report. For example, if you run a pledge context sensitive report from the Transaction List, the report will only display pledge records; gift records are excluded.

Note

In addition to Gift and Pledge contexts, a new Event context is available, for institutions and organizations that wish to make Event reports context specific.



Lookup Results

When working with lookups, please note the following:

- If the lookup results contain gift receipt numbers, gift context sensitive reports are available. For example, results from a transaction lookup with gift and/or matching gift are selected as part of the criteria.
- If the lookup results contain both receipt numbers and pledge numbers, both gift and pledge context sensitive reports are available. For example, results from a transaction lookup with gift, matching gift and pledge are selected as part of the criteria, or when gift is selected as criteria and pledge payments are returned.
- Gift context sensitive reports run from lookup result form include all gift records listed for inclusion in the report, including pledge payments.
- Pledge context sensitive reports run from lookup result form include all pledge records listed for inclusion in the report.

Clipboards

When working with clipboards, please note the following:

- Gift context sensitive reports are available on the following clipboards:
 - Primary Gift
 - Matching Gift
 - Gift
 - Gift Acknowledgement
 - Matching Gift Acknowledgement
- Pledge context sensitive reports will be available on the following clipboards:
 - Primary Pledge
 - Pledge
 - Pledge Acknowledgement
- If records on a clipboard are associated with gift and pledge receipt numbers, both gift and pledge context sensitive reports are available.
- Gift context sensitive reports run from a clipboard include all gift records listed for inclusion in the report, including pledge payments.
- Pledge context sensitive reports run from a clipboard include all pledge records listed for inclusion in the report.

Reporting

Advance Web supports the following reporting solutions, all of which can be associated with the new Gift and Pledge contexts.

- Web Forms
- InfoMaker / Power Builder Reports
- Crystal Reports / Crystal Server Reports

Lookups

Assignment priority

Advance Windows users who perform a Prospect, Program Prospect or Proposal Lookup (not the Advanced Lookups) are prevented from using Assignment Priority as a lookup criterion unless they enter an Assignment ID as part of their selection criteria.

Effective with this release of Advance Web, this same requirement is enforced when a user performs one of the following Template Lookups:

- Prospect – Prospect
- Prospect – Program Prospect
- Prospect – Proposal

The primary benefit of this functionality is it allows you to prevent a user from, for example, looking up all high priority assignments assigned to all staff members. By forcing the entry of an Assignment ID when specifying an Assignment Priority code, the person performing the lookup can only find assignments for one person or staff member at a time, which may or may not be theirs.



Note

While this functionality prevents a user from searching for all assignments for more than one ID number at once, it is important to keep in mind Advance Web does not prevent users from looking up multiple ID numbers through multiple separate queries.

Since the Template Lookups and Advanced Lookup are typically utilized by different operators with different access, and more restrictive access is typically placed on the Advanced Lookups, enforcement of entering an Assignment ID when selecting an Assignment Priority code is limited to the Template Lookups. Thus, users with access to the Advanced Lookup can continue to perform Advanced Lookups on the aforementioned lookup forms without entering an Assignment ID when entering an Assignment Priority code.



Note

For consistency purposes, the Assign ID and Assign Priority fields on these Template Lookup forms were reversed and Assign ID now appears above Assign Priority.

To perform a Template Lookup to locate Assignment Priority information using one of these Template Lookups:

1. Click Lookups from the Main Menu.
2. Select one of three templates listed above.
3. Select a Results Type to identify the format for the results of the lookup.

4. Select an Output Type to specify how you wish to output the results of the lookup.
5. Select a value from the Assign Priority field.
6. Enter an ID in the Assign ID field.
7. Enter additional information as necessary.
8. Click Search.

Prospect Lookup Help

Prospect	=	<input type="text"/>	(All)	<input type="text"/>
Active	=	<input type="text"/>	(All)	<input type="text"/>
Type	=	<input type="text"/>	(All)	<input type="text"/>
Stage	=	<input type="text"/>	(All)	<input type="text"/>
Stage Range Top	<=	<input type="text"/>	(All)	<input type="text"/>
Stage Range Bottom	>=	<input type="text"/>	(All)	<input type="text"/>
Expected Date	=	<input type="text"/>		<input type="text"/>
Major Prospect	=	<input type="text"/>	(All)	<input type="text"/>
Rating	=	<input type="text"/>	(All)	<input type="text"/>
Group	=	<input type="text"/>	(All)	<input type="text"/>
Classification	=	<input type="text"/>	(All)	<input type="text"/>
Campaign	=	<input type="text"/>	(All)	<input type="text"/>
Affiliation	=	<input type="text"/>	(All)	<input type="text"/>
Committee	=	<input type="text"/>	(All)	<input type="text"/>
Region	=	<input type="text"/>	(All)	<input type="text"/>
Team	=	<input type="text"/>	(All)	<input type="text"/>
Unit	=	<input type="text"/>	(All)	<input type="text"/>
Assign Type	=	<input type="text"/>	(All)	<input type="text"/>
Assign Status	=	<input type="text"/>	(All)	<input type="text"/>
Assign ID	=	<input type="text"/>	(All)	<input type="text"/>
Assign Priority	=	<input type="text"/>	(All)	<input type="text"/>
Assign Unit	=	<input type="text"/>	(All)	<input type="text"/>

Note

Failure to specify an Assignment ID will result in an error indicating the missing required value.

Lookups Actions

1. Choose a template (optional)
2. Select results format*
3. Select output type*
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Please provide an Assignment ID if an Assignment Priority is chosen.

Configuration Utility

Account Reactivation

In prior releases, when a user account was deactivated by un-checking the Active check box, Advance automatically placed the current date in the Stop Date field to indicate the date the account was inactivated.

Effective with this release, when a user account is reactivated by checking the Active check box, the Stop Date is automatically removed and the current date is automatically populated in the Start Date field.

The screenshot shows the 'Users Security' window with a list of users on the left and a detailed form for the selected user 'bsimpson' on the right. The 'Active' checkbox is checked and highlighted with a red box. The 'Start' date field is also highlighted with a red box and contains the date '09/01/2003'. Other fields include 'Supervisor', 'Unit', 'Office', 'User Group', 'Prospect Group', 'Profile Group', 'Default Tablespace', 'Temp. Tablespace', 'Profile', 'Authorization Date', and 'Comment'. The 'User Rights' section at the bottom shows two rights groups: '1 Default Inquiry' and '2 Default Maintenance', both with a sort order of '999'.

Obsolete Columns Removed

The following fields no longer appear on the Users Security Window and are obsolete as of Advance 9.7.0.0:

- LDAP DN Base
- LDAP Search

Additionally, the following columns were removed from the zz_user database table:

- ldap_dnbase
- ldap_searchstring
- awa_username

Force Password Change

A new check box on the Users Security window allows you to force a user to change their password the next time they attempt to login to any application that uses the Advance Security Model. By default this check box is not checked, and a user is not forced to change their password.

This functionality only applies to institutions and organizations using Database authentication (zz_user.authentication_type = DB).

The screenshot shows the 'Adv Users Security' window with the following details:

User Name	Name
aarthur	Abraham Arthur
bsimpson	Bertha Simpson
cbguy	Charles B. Guy
nflanders	Norman Flanders

User Detail

Active Supervisor Events Super User
 Super Group Super Prospect Group

User Name: bsimpson Unit: M Medical School
Authentication: Database Office: AF Annual Fund
 Database Account User Group: JD Undergrad School
Password: ***** Prospect Group: (none)
Confirm Pwd: ***** Profile Group: (none)
Name: Bertha Simpson Default Tablespace: ADVANCE_DATA
Title: Annual Fund Office Supervisor Temp. Tablespace: TEMPORARY_DATA
Address 1: Profile: DEFAULT
Address 2: Start: 09/01/2003 Stop:
Phone: Authorization Date: 11/04/2003
Email Address: bsimpson@tps.com Comment:
Sort Name: SIMPSON, BERTHA
ID: 0001001112 Mrs. Bertha Simpson Added: 7/26/06 13:38
Mail Code: MAIL Mail Code Last Modified: 7/26/06 13:38
Dom. Exch. User: bsimpson By: adv97
Last Logon: 4/28/2011 4:10 PM Logon Freq: 2981
Pwd Last Updt: Force Password Change Excl From Pwd Expiration
Oracle Status: OPEN

User Rights

Rights Group	Default Inquiry	Sort Order	Ad
1	Default Inquiry	999	3/1
2	Default Maintenance	999	3/1

Buttons: Insert, Erase, Rights, Aliases, Roles

When this check box is checked, the user will be instructed to change their password when they attempt to log into one of the following applications:

- Advance (Web or Windows)
- Advance Configuration Utility
- AdvLoader
- AdvExport
- SmartCall Integration Utility



Note

This functionality does not apply to Event Management.

To change their password they must do one of the following:

1. Log into Advance Windows, at which time they will be directed to the Change Password window. If they do not successfully change their password or they close the password window, Advance will close.
2. Log into Advance Web, at which time they will be directed to the Change Password form. For Advance Web, the available options are to change their password on the Change Password form or close the browser. If they successfully change their password, they will gain access to the application. Otherwise, the application will keep them on the Change Password form.
3. Log into the Configuration Utility, at which time they will be directed to the Change Password window. If they do not change their password or they close the Change Password window, the Configuration Utility will close.

When the user successfully changes their password:

1. The Force Password Change check box is unchecked for that user.
2. The Pwd Last Update field is updated to the current date.



Exclude from Password Expiration Default

When a new user account is added via the Users Security window, the Exclude from Password Expiration check box is not checked by default. In previous releases the default was checked. This new default aims to decrease the likelihood of human error when adding new users that should not be excluded from password expiration.



Note

This check box defaults to unchecked regardless of whether password expiration is enabled via system option 230.

If you use password expiration and system option 230 is enabled, and you wish to exclude a user from password expiration, you must manually check this box. User accounts established prior to this release are not impacted by this change and whether this check box is checked on a user's row is the same after the upgrade to Advance 9.7.0.0 is complete.

The screenshot shows the 'Users Security' window with the following details for user 'bsimpson':

User Name	Name
aarthur	Abraham Arthur
bsimpson	Bertha Simpson
cbguy	Charles B. Guy
nflanders	Norman Flanders

User Detail

Active Supervisor Events Super User
 Super Group Super Prospect Group

User Name: bsimpson
Authentication: Database
 Database Account
Password: *****
Confirm Pwd: *****
Name: Bertha Simpson
Title: Annual Fund Office Supervisor
Address 1:
Address 2:
Phone:
Email Address: bsimpson@tps.com
Sort Name: SIMPSON, BERTHA
ID: 0001001112 Mrs. Bertha Simpson
Mail Code: MAIL Mail Code
Dom. Exch. User: bsimpson
Last Logon: 4/28/2011 4:10 PM Logon Freq: 2981
Pwd Last Updt: Force Password Change Excl From Pwd Expiration
Oracle Status: OPEN

Unit: M Medical School
Office: AF Annual Fund
User Group: JD Undergrad School
Prospect Group: (none)
Profile Group: (none)
Default Tablespace: ADVANCE_DATA
Temp. Tablespace: TEMPORARY_DATA
Profile: DEFAULT
Start: 09/01/2003 Stop:
Authorization Date: 11/04/2003
Comment:
Added: 7/26/06 13:38
Last Modified: 7/26/06 13:38
By: adv97

User Rights

Rights Group	Default Inquiry	Sort Order	Ad	Aliases	Roles
1	Default Inquiry	999	3/1		
2	Default Maintenance	999	3/1		

Oracle Status Display and Unlocking Accounts

In prior releases, there was no way to know if an Oracle account was locked. Effective with this release a new inquiry-only field displays on the Users Security window and corresponding Print DataWindow indicating the status of the Oracle account. Valid Oracle statuses include Open, Locked and Expired & Locked.

The screenshot shows the 'Users Security' window for user 'bsimpson'. The 'Oracle Status' field is highlighted with a red box and shows 'OPEN'. Other fields include 'Active' (checked), 'Supervisor' (checked), 'Unit' (M), 'Office' (AF), 'User Group' (JD), 'Profile Group' (none), 'Default Tablespace' (ADVANCE_DATA), 'Temp. Tablespace' (TEMPORARY_DATA), 'Profile' (DEFAULT), 'Start' (09/01/2003), 'Authorization Date' (11/04/2003), 'Last Logon' (4/28/2011 4:10 PM), and 'Logon Freq' (2981). The 'Rights' section shows two entries: 'Default Inquiry' and 'Default Maintenance', both with a sort order of 999.

When an Oracle account is locked, a button allows you to unlock the Oracle account. This button does not appear when the status of the Oracle account is Open or Expired & Locked.

The screenshot shows the 'Oracle Status' field set to 'LOCKED' and an 'Unlock' button next to it.

When Unlock is selected, the status is set to Open and a message indicating the change appears. If you make other changes on the window, you must save the changes before unlocking the account.

The screenshot shows a dialog box titled 'Unlock Oracle Account' with a message icon and the text 'Oracle account unlocked successfully'. An 'OK' button is at the bottom.

Note

This new functionality does not impact the ability to Unlock an Advance Web account (in the zz_user database table), which remains as in previous releases. Additionally, since this is an Oracle value, the status is not stored in the Advance database in the zz_user database table.

Support

The following non-SunGard Higher Education platforms and operating environments were tested against, and are supported for use with, Advance Web 9.7.0.0.

Browsers

- Microsoft® Internet Explorer® 7
- Microsoft Internet Explorer 8
- Microsoft Internet Explorer 9
- Mozilla Firefox 3.6
- Mozilla Firefox 4.0
- Safari 5 (Mac, iPad, Windows)
- Google Chrome 11.0

Client operating systems

- Windows XP Professional, SP2
- Windows 7 Enterprise
- 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 v10.6.6, for Macintosh
- iOS 4.3.2, for iPad

Databases

- Oracle 11g (11.1.0.6.0)
- Oracle 11g R2 (11.2.0.1.0)

Oracle Database Access Components (ODAC)

- 11.2 Release 3 (11.2.0.2.1) for Microsoft Windows Server 2008 win32
- 11.2 Release 3 (11.2.0.2.1) for Microsoft Windows Server 2008 x64

Web servers

- Microsoft Windows Server 2008 Enterprise with IIS7 on 32-bit hardware
- Microsoft Windows Server 2008 Enterprise with IIS7 on 64-bit hardware in 32-bit or 64-bit mode
- Microsoft Windows Server 2008 R2 Enterprise with IIS7.5 on 64-bit hardware in 32-bit or 64-bit mode
- Microsoft .NET Framework v4.0



Microsoft .NET Framework v3.5 is required by the Web Server installation and for post-release configuration.

Mobile devices

- Blackberry Curve 8900 Series
- iPad



The Blackberry Curve 8300 and Palm Treo 750 are no longer supported.

Online help

- Adobe® RoboHelp® 8.0.2.208

Application development

- Microsoft® Visual Studio® 2010 SP1 (for Advance Web)
- Sybase® PowerBuilder Enterprise 12.1, Build 6518 (for the Advance Configuration Utility)

Other

- Crystal Reports Server 2008 (32-bit only)
- Crystal Reports .NET Runtime (XI R2 or 2008) - (32-bit only)
- Pubcookie 3.3.x
- LDAP, Version 3.0 Compliant
- MKS® 9.1.0100 (32-bit only)
- Microsoft Office 2003, 2007, 2010



Microsoft Office 2007 or 2010 documents need to be saved in Microsoft Office 2003 format via lowest common denominator approach before being loaded into Advance.

- 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
- iModules Encompass Production Version



The use of Encompass and AWC concurrently is not supported.

- ASPOSE 8.1.0
- Active Directory Microsoft Server 2008
- SunGard Bi-Tech IFAS 7.9 w/Patch
- SunGard EXP MACCESS 3.4 SP4



EXP MACCESS 3.4 SP3 is no longer supported.

- EMC Documentum ApplicationXtender (32-bit only)
 - Client: ApplicationXtender Desktop 6.50.124
 - Server: ApplicationXtender Desktop, License Server 6.50.127, Rendering Server 6.50.124, Web Access 6.50.124



ApplicationXtender does not support documents saved in Microsoft Office 2007 or 2010 format; it does support documents saved in earlier formats, e.g., Microsoft Office 2003 via lowest common denominator approach.

- Quick Scan Pro 4.7.0 (optional)



Compatibility

The following SunGard Higher Education applications were tested with, and are compatible with, Advance Web 9.7.0.0.

Advance Windows

- Version 9.7.0.0

Advance Web Community (AWC)

- Version 4.2.0



Note

The use of Encompass and AWC concurrently is not supported.

Advance Configuration Utility

- Version 9.7.0.0 (in 32-bit mode on 32-bit and 64-bit hardware)

Events

- Version 4.0 (contact em-support@sungardhe.com for possible critical fixes)

SmartCall / Advance Synchronization

- Version 9.7.0
- Version 9.6.0 (contact smartcall-support@sungardhe.com for possible critical fixes)
- Version 9.5.0 (contact smartcall-support@sungardhe.com for possible critical fixes)

SmartCall Integration Utility (SIU)

- Version 3.8 (for SmartCall 9.5.0, 9.6.0 and 9.7.0)

Pledge Integration Utility (PIU)

- Version 2.9 (for SmartCall 9.7.0)
- Version 2.8 (for SmartCall 9.5.0 and 9.6.0)

Data Movement

- Version 5.1 (contact em-support@sungardhe.com for possible critical fixes)

Site Help Integration Utility

- Version 3.0

Advance Loader (AdvLoader)

- Version 9.7.0.0

Advance Export (AdvExport)

- Version 9.7.0.0

Job Scheduler

- Version 3.1

Banner Student

- Version 8.4



System-wide Changes

Database scripts

As part of the upgrade process, tables that have changes from previous versions of Advance are recreated and data is moved to the new table structures and the old table is removed. For example, if the address table has new columns added to the table, during the upgrade process:

1. A new working table called `wk_address` is created.
2. The data in the address table is moved to the `wk_address` table.
3. The address table is removed.
4. The `wk_address` table is renamed to `address`.

Since your institution may have specific grants that you associate with each Advance table (which controls levels of access each user has to each table) it is recommended that you pay very close attention to and become familiar with the grants associated with each table before proceeding with the upgrade.

If you do not pay attention to specific grants for each table, and they are removed as part of the upgrade process, you may not know which rights to add back to each user for each table.

The database restructure script, `db_restructure.ksh`, is the main script used to transform the existing database structure to the new structure. This script can be found in the `db_changes` subdirectory.

Database changes

This section lists all database changes in Advance 9.7.0.0.

Note

This section lists database changes in the Advance database, including those for use with Advance Windows and Advance Web.

Key

new column	Indicates the column(s) listed below are new to the table.
new table	Indicates the entire table is new.
increased size	Indicates the column increased in size. In these occurrences, the new and old sizes are listed.
decreased size	Indicates the column decreased in size. In these occurrences, the new and old sizes are listed.
null/not null	Indicates whether the column accepts a null value.
obsolete column	Indicates the column is no longer used in the table.
obsolete table	Indicates the table is no longer used.
renamed column	Indicates the column name changed. In these occurrences, the new and old names are listed.

awc_gift_transaction (increased size)

- authcode from varchar2(25) to varchar2(200)

awc_memb_transaction (increased size)

- authcode from varchar2(25) to varchar2(200)

batch_gift_tender_type (increased size)

- bg_card_auth_code from varchar2(25) to varchar2(200)

ep_awc_payment (increased size)

- authcode from varchar2(25) to varchar2(200)

gift_tender_type (increased size)

- card_auth_code from varchar2(25) to varchar2(200)

gift_tender_type_reversal (increased size)

- card_auth_code from varchar2(25) to varchar2(200)

imodules_download_gift_alloc (new table)

- imodules_download_gift_id integer not null
- transaction_id integer not null
- instance_id varchar2(40) not null
- xsequence integer not null
- allocation_code varchar2(16) null
- allocation_name varchar2(200) null
- allocation_amt number(14,2) null
- id_number varchar2(10) null
- location_id number null

imodules_download_gift_alloc_bk (new table)

- imodules_download_gift_id integer not null
- transaction_id integer not null
- instance_id varchar2(40) not null
- xsequence integer not null
- allocation_code varchar2(16) null
- allocation_name varchar2(200) null
- allocation_amt number(14,2) null
- id_number varchar2(10) null
- location_id number null

imodules_download_gift (new table)

- imodules_download_gift_id integer not null
- transaction_id integer not null
- instance_id varchar2(40) not null
- xsequence integer not null
- from_facebook smallint null
- imod_member_id varchar2(500) null
- id_number varchar2(10) null
- prefix varchar2(25) null
- first_name varchar2(25) null
- middle_name varchar2(25) null
- last_name varchar2(25) null
- pers_suffix varchar2(25) null

• prof_suffix	varchar2(25)	null
• email_address	varchar2(320)	null
• addr_type_code	varchar2(2)	null
• street1	varchar2(75)	null
• street2	varchar2(75)	null
• street3	varchar2(75)	null
• city	varchar2(50)	null
• state_code	varchar2(3)	null
• zipcode	varchar2(30)	null
• country_code	varchar2(50)	null
• billing_street1	varchar2(75)	null
• billing_street2	varchar2(75)	null
• billing_city	varchar2(50)	null
• billing_state	varchar2(3)	null
• billing_zipcode	varchar2(30)	null
• billing_country_code	varchar2(50)	null
• transaction_amt	number(14,2)	null
• payment_amt	number(14,2)	null
• transaction_date	date	null
• card_auth_code	varchar2(200)	null
• credit_card_type	varchar2(4)	null
• pref_class_year	varchar2(4)	null
• pref_school_code	varchar2(4)	null
• conn_to_school	varchar2(2)	null
• joint_donor_name	varchar2(100)	null
• tribute_type	varchar2(100)	null
• tribute_full_name	varchar2(100)	null
• tribute_notification_name	varchar2(100)	null
• tribute_occasion	varchar2(100)	null
• tribute_comments	varchar2(4000)	null
• matching_gift_company	varchar2(255)	null
• matching_gift_company_data	varchar2(4000)	null
• payment_type	varchar2(2)	null
• payment_freq	integer	null
• total_scheduled_amt	number(14,2)	null
• next_payment_amt	number(14,2)	null
• next_payment_date	date	null
• campaign_code	varchar2(6)	null



- download_date date null
- batch_number varchar2(10) null
- receipt_number varchar2(10) null
- pledge_number varchar2(10) null
- location_id number null

imodules_download_gift_bk (new table)

- imodules_download_gift_id integer not null
- transaction_id integer not null
- instance_id varchar2(40) not null
- xsequence integer not null
- from_facebook smallint null
- imod_member_id varchar2(500) null
- id_number varchar2(10) null
- prefix varchar2(25) null
- first_name varchar2(25) null
- middle_name varchar2(25) null
- last_name varchar2(25) null
- pers_suffix varchar2(25) null
- prof_suffix varchar2(25) null
- email_address varchar2(320) null
- addr_type_code varchar2(2) null
- street1 varchar2(75) null
- street2 varchar2(75) null
- street3 varchar2(75) null
- city varchar2(50) null
- state_code varchar2(3) null
- zipcode varchar2(30) null
- country_code varchar2(50) null
- billing_street1 varchar2(75) null
- billing_street2 varchar2(75) null
- billing_city varchar2(50) null
- billing_state varchar2(3) null
- billing_zipcode varchar2(30) null
- billing_country_code varchar2(50) null
- transaction_amt number(14,2) null
- payment_amt number(14,2) null
- transaction_date date null
- card_auth_code varchar2(200) null

- credit_card_type varchar2(4) null
- pref_class_year varchar2(4) null
- pref_school_code varchar2(4) null
- conn_to_school varchar2(2) null
- joint_donor_name varchar2(100) null
- tribute_type varchar2(100) null
- tribute_full_name varchar2(100) null
- tribute_notification_name varchar2(100) null
- tribute_occasion varchar2(100) null
- tribute_comments varchar2(4000) null
- matching_gift_company varchar2(255) null
- matching_gift_company_data varchar2(4000) null
- payment_type varchar2(2) null
- payment_freq integer null
- total_scheduled_amt number(14,2) null
- next_payment_amt number(14,2) null
- next_payment_date date null
- campaign_code varchar2(6) null
- download_date date null
- batch_number varchar2(10) null
- receipt_number varchar2(10) null
- pledge_number varchar2(10) null
- location_id number null

imodules_mapping (increased size)

- imod_field_name from varchar2(40) to varchar2(50) (new columns)
- load_type varchar2(2) not null
- campaign_control_id number not null

yy_gp_matches_tender (increased size)

- card_auth_code from varchar2(25) to varchar2(200)

zz_gpl_gift_tender_type (increased size)

- bg_card_auth_code from varchar2(25) to varchar2(200)

zz_gpl_load (obsolete table)



zz_gpl_transaction (increased size)

- card_auth_code from varchar2(25) to varchar2(200)

zz_gpl_transaction_archive (increased size)

- card_auth_code from varchar2(25) to varchar2(200)

zz_user (obsolete columns)

- awa_username varchar2(255)
- ldap_dnbase varchar2(255)
- ldap_searchstring varchar2(255)

(new column)

- force_password_chg_ind char(1) not null

TMS views

This section lists TMS view changes in Advance 9.7.0.0.

Modified TMS Views

Modified views, in alphabetical order, along with their corresponding table codes and changes, are as follows:

View Name	Table Code	Change
tms_batch_type	J1	Added required code X – ‘Online Duplicate Transactions’ Changed description of code W to ‘Online Community Transactions’
tms_credit_card_auth_source	G9	‘Use for AWC’ changed to ‘Use for Online Giving’
tms_gift_src_info	GB	‘Use for AWC’ changed to ‘Use as source for Online Giving’
tms_credit_card	GC	A new field ‘Online Giving Card Type’ was added

System options

This section contains information regarding new system options since the release of Advance 9.6.0.1, as well as system options that have been modified in this release.

For a complete list of system options, please refer to the *Advance System Options Reference* or Online Help.

Modified Advance System Options

With functionality extended for use with Encompass, the following system options changed.

85 Unauthenticated Donor ID for AWC

This Entity ID is associated with all gift and pledge transactions made by unauthenticated donors in AWC. When processing these transactions during gift entry, the appropriate Entity ID should be associated with each transaction in lieu of this number.

Was changed to:

Unauthenticated Donor ID

This Entity ID is associated with all online gift and pledge transactions made by unauthenticated donors. When processing these transactions during gift entry, the appropriate Entity ID should be associated with each transaction in lieu of this number.

86 Allow AWC Deletes on Ledger

When enabled, gifts and pledges entered via AWC can be deleted in the Gift Entry Ledger.

Was changed to:

Allow Deletes on Ledger

When enabled, gifts and pledges entered via the Online Community's website can be deleted in the Gift Entry Ledger.

87 Allow AWC Modifications of Ledger

When 0, gifts and pledges entered via AWC have the Primary Amount, Donor Amount, Transaction Type, Check Number or Tender modified. When 1, these transactions can be modified in the Gift Entry Ledger. When 2, only the Donor field can be changed.

Was changed to:

Allow Modifications on Ledger

When 0, online gifts and pledges cannot have the Primary Amount, Donor Amount, Transaction Type, Check Number or Tender modified. When 1, these transactions can be modified in the Gift Entry Ledger. When 2, only the Donor field can be changed.

88 Number of Transactions in AWC and GiftLoader Batches

This value indicates the maximum number of transactions that will be stored in each Batch Control row before a new batch is created to contain subsequent transactions. Applies to both AWC and GiftLoader, independently.

Was changed to:

Number of Transactions in Online and GiftLoader Batches

This value indicates the maximum number of transactions that will be stored in each batch before a new batch is created to contain subsequent transactions. Applies to both Online Community and GiftLoader, independently.

The Advance system options category for System Option 88 was changed from “AWC/GiftLoader” to “Online / GiftLoader”

108 AWC Batch Type

The code in this system option determines which batch type code will be assigned to batches that are created in Advance as a result of gifts and pledges made through AWC. Must be a valid value in tms_batch_type.

Was changed to:

Online Batch Type

The code in this system option determines which batch type code will be assigned to batches that are created in Advance as a result of gifts and pledges made through an Online Community. Must be a valid value in tms_batch_type.

New AWC System Options

This section contains information regarding new AWC system options (zz_mt_sysoptions) in Advance 9.7.0.0.

A ♦ indicates the default setting.

184 Allocation Default

If designations are not enabled or required in Encompass, this option must be populated with a valid allocation. This will allow the gift ledger entry to be created in batch without issue.

- ♦ blank The value specified here must be a valid allocation code from the Allocation table.

Modified AWC System Options

The following AWC system options (zz_mt_sysoptions) were modified in Advance 9.7.0.0.

Effective with this release, the following AWC system options were extended for use with Encompass and now display in the “Online Giving Options” category:

- 26 Giving Options Appeal Code
- 27 Giving Options Campaign
- 28 Giving Options Credit Card Tender
- 33 Giving Options Gift Transaction Type
- 34 Giving Options Operator Name
- 37 Giving Options User Group
- 155 Unauthenticated Operator Name
- 156 Unauthenticated User Group
- 146 Associated Code for Multiple Allocation

Defect Fixes

The following table contains a brief description of each defect resolved in Advance Web 9.7.0.0.

Defect #: 11777 Synopsis: Field Name value is saved in upper case on action button control types
Defect #: 12110 Synopsis: Add the ability to type ahead while the form is painting
Defect #: 12147 Synopsis: New entity gender not set based on prefix
Defect #: 12567 Synopsis: Can't see connection pool settings above 100
Defect #: 12721 Synopsis: Config Utility: User with inquiry only access able to add rights identifier to user
Defect #: 12737 Synopsis: Relationship data has dangling comma if entity has no address data
Defect #: 12887 Synopsis: Add new item to the nav tree for batch control (gift & memb) error
Defect #: 13265 Synopsis: Alt keys are non-functional using IE 7
Defect #: 13524 Synopsis: After using hyperlink on clipboard and close, return is to top of list
Defect #: 13764 Synopsis: DataLoader - inconsistency in trimming blank spaces
Defect #: 13776 Synopsis: Credit2 is missing from associated donors in the gift entry ledger
Defect #: 13832 Synopsis: Entity deceasing utility shows past addresses in Nav tree
Defect #: 13875 Synopsis: GMOD is non-functional for matching gift - get clipboard is empty message
Defect #: 14112 Synopsis: Copy/replace as output option does not copy entity id to clipboard
Defect #: 14149 Synopsis: Problem accessing prospect task from Prospect Views
Defect #: 14160 Synopsis: Proposal assignments does not expand on PTSUM when more than one
Defect #: 14177 Synopsis: Add ability to copy gift receipt number plus sequence to clipboard
Defect #: 14189 Synopsis: DataLoader invalid code message doesn't specify field
Defect #: 14194 Synopsis: DataLoader: children data user group, source code problems
Defect #: 14234 Synopsis: Spell check on contact reports
Defect #: 14380 Synopsis: Gift/Pledge Loader not populating associated donor amount field

Defect #: 14448 **Synopsis:** Address type code defaults to H when adding address for organization

Defect #: 14528 **Synopsis:** DataLoader error posting multiple address records

Defect #: 14534 **Synopsis:** Copy All options for Contact Report List not saving to Clipboard

Defect #: 14542 **Synopsis:** Institutional Suffix generation not enabled if system option 53 set 2

Defect #: 1-6OMOEG **Synopsis:** Address status change not saved using deceasing utility

Defect #: 1-6OOHON **Synopsis:** Past addresses do not show in list when clicking on past address from nav tree for deceasing utility

Defect #: 1-6XUAPI **Synopsis:** allow other contexts for reports

Defect #: 1-7FMP05 **Synopsis:** QAS address verification not functional when using FireFox

Defect #: 1-7H6GGS **Synopsis:** When using the deceasing utility, would like to have the phone status set to 'last known'

Defect #: 1-7QKRXI **Synopsis:** Add preferred phone check box to add person, add organization

Defect #: 1-816RNO **Synopsis:** Support Google Chrome

Defect #: 1-8OAPF5 **Synopsis:** Same control ID used on gift clubs and volunteer activity error running entity profile report

Defect #: 1-8R3NDM **Synopsis:** Error modifying an organization type entity name with system option 91 = (none)

Defect #: 1-8VGY3K **Synopsis:** problem with menus staying open in Advance Web 9.4

Defect #: 1-9DJNJZ **Synopsis:** Claim amount not calculated correctly with system option 20 = N

Defect #: 1-9DQDSD **Synopsis:** Preferred address indicator not checked when adding a new address of the same type as the current

Defect #: 1-AMN9ZO **Synopsis:** Entity Update with DataLoader option does not store user who submitted change

Defect #: 1-AU7WQD **Synopsis:** Some keyboard shortcuts are not working

Defect #: 1-BEOP94 **Synopsis:** w_awc_loader_employment has job title defined as a length of 40

Defect #: 1-BFAR8D **Synopsis:** Mass Update for appeals is not recognizing international date format options

Defect #: 1-BHRV7O **Synopsis:** Shortcut keys are not working in firefox

Defect #: 1-BJGJCW **Synopsis:** Entity Profile Report

Defect #: 1-BM9B1R **Synopsis:** F2 Entity Lookup Does Not Work For Unauthenticated Gifts

Defect #: 1-BMARHP **Synopsis:** Drilldown for entity_address is missing the address.aspx in the

URL column

Defect #: 1-BVP9XM **Synopsis:** Table security not enforced unless user is denied access

Defect #: 1-CCH5ZX **Synopsis:** Unable to add a new code to base table tms_payout_frequency

Defect #: 1-CJR5TB **Synopsis:** Advance Upgrades Do Not Work on Red Hat Linux

Defect #: 1-CX8PGK **Synopsis:** Mass Add for Entity Contact Report does not populate name if user does import to clipboard

Defect #: 1-D4ZRS9 **Synopsis:** Integrity Check Test #1045

Defect #: 1-DBZ6P4 **Synopsis:** Manual copy to clipboard of primary gift receipt number strips off leading zeros except for last one

Defect #: 1-DO0YL1 **Synopsis:** Warning message appears on save of second set of goal data on staff application

Defect #: 1-E5N8DH **Synopsis:** Event Registration documents roll up to Events context

Defect #: 1-E8N5VV **Synopsis:** Various views for Prospect Tracking for Corp. with subsidiary hang

Defect #: 1-EHWITF **Synopsis:** The Major from the tms degrees table is not defaulting when adding a new degree

Defect #: 1-EY4V6X **Synopsis:** WEB gift source causes AWC error message

Defect #: 1-GANMVR **Synopsis:** DataLoader error loading gift acknowledgement data

Defect #: 1-GZYBV5 **Synopsis:** Problems changing payment frequency from A to O. User gets messages, change saved but update wrong

Defect #: 1-H3QKQZ **Synopsis:** Advance database install does not load tables in proper order

Defect #: 1-H5ML95 **Synopsis:** Gift modification does not issue error message and does not write data to batch tables

Defect #: 1-H9ZEPS **Synopsis:** Mass Modify of Contact Reports fails to properly create a DataLoader batch

Defect #: 1-HEEPQD **Synopsis:** User gets incorrect message regarding claim generation when employment has primary employer checkbox

Defect #: 1-HKQLBH **Synopsis:** User gets error drilling down from registration if ep_participant does not have a sequence of 1

Defect #: 1-HLIX8P **Synopsis:** Large SQL files don't have enough commits

Defect #: 1-HRYBG3 **Synopsis:** Application error when trying to match large number of claim rows

Defect #: 1-HRYBHN **Synopsis:** Changing appeal code overwrites data in appeal header

Defect #: 1-HV0RCQ **Synopsis:** Errors in upgrade when loading metadata tables

Defect #: 1-HV0RJ7 **Synopsis:** Advance 9.6 make does not add row to zz_location

Defect #: 1-HXS9CO **Synopsis:** Entity update for home address clears all forms not just home address

Defect #: 1-I3COGN **Synopsis:** User is able to change date of record to be after first payment date for payment schedule

Defect #: 1-IBIPYK **Synopsis:** Same gift code for multiple gift code types causes crash in gift entry ledger

Defect #: 1-IC0US7 **Synopsis:** Reversing a membership does not remove the membership payment schedules

Defect #: 1-IFWSEY **Synopsis:** DataLoader modify of Special Handling data does not show current data

Defect #: 1-IQQKUD **Synopsis:** LDAP Settings in documentation incorrect

Defect #: 1-IQQKUF **Synopsis:** zz_apb_rpt_dw failed to get updated in 9.4

Defect #: 1-IQQKUH **Synopsis:** Extra code in 9.4.0.1 upgrade causes error that does not get logged

Defect #: 1-IRV2JQ **Synopsis:** Geo code drop down in geo zip does not bring up a list of values

Defect #: 1-IT0NOS **Synopsis:** Error during integrity check execution

Defect #: 1-IT2G39 **Synopsis:** Entity Profile Reports - you can't print them all at one time

Defect #: 1-IT2G3C **Synopsis:** Entity Profile Reports - no page breaks

Defect #: 1-IUCCGK **Synopsis:** QAS verification window remains active when modifying an address if delivery point not in layout

Defect #: 1-JJATJS **Synopsis:** Funding Purpose Nav tree menu reverts to the homepage nav tree menu

Defect #: 1-JQ1PRH **Synopsis:** Display issues when using IE 8 without using compatibility mode

Defect #: 1-K73UXW **Synopsis:** Error trying to use recruitment_event_code in lookups

Defect #: 1-KKJLDJ **Synopsis:** payment schedule data repeats for pledge with more than one donor

Defect #: 1-L2RWC1 **Synopsis:** Wrong validation error message is defined in adv_assignment.bdy

Defect #: 1-L3NN81 **Synopsis:** The primary affiliation is not appearing on the entity header

Defect #: 1-L3NZ4C **Synopsis:** Missing values in metadata tables can cause errors in Config

Utility

Defect #: 1-L6S1EI **Synopsis:** TMS Document incorrect for batch_status table

Defect #: 1-L88E9D **Synopsis:** DataLoader: children load silently fails if relationship error encountered

Defect #: 1-LA3KFC **Synopsis:** ability to sort the Crystal Report dropdown menu on the Web Report Maint form by alpha

Defect #: 1-LWEG18 **Synopsis:** The Proposal Lookup for the stage ranges is using the wrong tms table

Defect #: 1-MG1TOL **Synopsis:** Entity update marital status change fails silently when posted with DataLoader

Defect #: 1-MKJY6I **Synopsis:** Crystal Reports do not work in 9.4.1

Defect #: 1-N3W8BS **Synopsis:** User gets error using linkedin URL when going to eContact application

Defect #: 1-NAQRL7 **Synopsis:** Entity update: error saving business address if title more than 40 chars

Defect #: 1-NEHJ5C **Synopsis:** DataLoader: increase precision for number of shares on Allocation Financials

Defect #: 1-NHDYZ9 **Synopsis:** Proposal stage integrity check references wrong tms table.

Defect #: 1-NIGTWE **Synopsis:** Integrity Item 1186 flags anonymous in the instrument table as required. It is not required.

Defect #: 1-NX6VKF **Synopsis:** Unique constraint error on changing name type code on name

Defect #: 1-O5PNFQ **Synopsis:** Ticketing giving totals crashes with an error if the transaction type code is numeric.

Defect #: 1-O78ADD **Synopsis:** Matching Gift Entry does not assign mg_number if there is no claim

Defect #: 1-ON7RV4 **Synopsis:** Setting delete by date on clipboard save form to required can result in errors if no date.

Defect #: 1-ONSPWT **Synopsis:** Preview App button in Config Utility does not work

Defect #: 1-OVVX32 **Synopsis:** When performing a lookup on an email column change the input data and the stored data to upper case

Defect #: 1-PCK9ZS **Synopsis:** New bio forms allow maintenance for core only license

Defect #: 1-PKY3T7 **Synopsis:** Modifying a gift with premium data does not bring premium data into gift entry ledger

Defect #: 1-PO63IK **Synopsis:** Exchange synchronization does not work for other people

responsible in task

Defect #: 1-Q2LVO9 **Synopsis:** Need to add to prospect user's guide that html tags are not allowed in text area

Defect #: 1-Q6COGF **Synopsis:** Error when trying to copy or move gift appeal data using entiy merge

Defect #: 1-Q6GN70 **Synopsis:** Use table security and check owner is not checking all rights identifiers in TMSC

Defect #: 1-QCH41L **Synopsis:** Performance issue updating bg_associated_donor on a modify

Defect #: 1-QSS2WE **Synopsis:** Gift premium data not brought into batch on gift modification when matching claim exists

Defect #: 1-RNPMJP **Synopsis:** An Accented character in a lookup menu label results in a garbled title on the application tab

Defect #: 1-RQPU5W **Synopsis:** Deleting a gift mod that does not have a matching gift deletes the matching gift for other gift

Defect #: 1- 1-RSF8RR **Synopsis:** DataLoader batch of mixed entity add and Modify records assigns new ID numbers incorrectly

Defect #: 1-RYLO0Y **Synopsis:** readme.txt file under SiteHelp on the web server refers to BSR FTP site

Defect #: 1-RSF8RR **Synopsis:** DataLoader batch of mixed entity add and Modify records assigns new ID numbers incorrectly

Defect #: 1-SIDPU3 **Synopsis:** Not able to update payment schedules for pledges with multiple donors using pledge update

Known Issues

The following table contains a brief description of known issues in Advance Web 9.7.0.0. For additional information on any of these issues, please contact customersupport@sungardhe.com.

Synopsis: Unable to open MS Excel (2003 and 2007) documents stored in Advance Windows.
Description: If you save an MS Excel 2003 (xls) or 2007 (xlsx) file in Advance Windows, you are unable to open those files in Advance Web. This issue has been confirmed as a 3rd party software product limitation.

Synopsis: Unable to open MS Office 2010 files stored in Advance Windows. **Description:** If you save a MS Office 2010 file (docx, xlsx, etc.) in Advance Windows, you are unable to open those files in Advance Web. This issue has been confirmed as a 3rd party software product limitation

Synopsis: Ctrl + N keyboard shortcut doesn't function as expected in Google Chrome. **Description:** The keyboard shortcut Ctrl + N is reserved for creating a new row on the Giving Codes form. However, in Google Chrome, this keyboard shortcut opens a new browser tab instead of creating a new Giving Code row.

Synopsis: F5 does not open Go To in Safari. **Description:** The keyboard shortcut F5 is reserved for opening Go To. However, in Safari, this keyboard shortcut does not function as expected and Go To does not appear when you press F5.

Synopsis: Gift and Membership Batch Control keyboard shortcuts do not function in Safari.
Description: The keyboard shortcuts Alt + B, Alt + F and Alt + V do not function as expected in Gift and Membership Batch Control in Safari. Additionally, Alt + E does not function in Gift Batch Control.

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