

ellucian™

Advance Web Release Notes

Release 9.8.1.0
June 2012



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Revision History

Publication Date	Summary
June 2012	New version that supports Advance 9.8.1.0 software.

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Executive Summary

As part of Ellucian's ongoing effort to continuously improve the quality of products, services and processes, Advance Web 9.8.1.0 introduces new functionality, as described below.

Right pane refinements

In order to better utilize the space on the right side of the screen, Advance Web automatically collapses the Right Pane so that only the information on the left side of the screen will appear when there is no information to display in the Right Pane. This allows you to configure forms to be wider than the standard form width (543px) and display additional information and form controls.

Last Viewed improvements

The Last Viewed form on the Home Page was streamlined to consistently display Entity, Prospect and Contact Report hyperlinks. Additionally, a new Main Menu icon provides access to a list of categories and records previously accessible through the Last Viewed form.

Sort order using metadata

A new form option allows you to specify a default sort on forms. This may be of particular importance on forms that contain data that might be best viewed in a certain order. Since this type of configuration is stored in the database as metadata, the sort will be retained when you upgrade to future versions of Advance, thereby eliminating the need to re-implement this configuration.

Save and Delete confirmation messages

Save and Delete confirmation messages enhance the user-experience by providing a visual indication that the requested save or deletion was successful. When a user with maintenance rights clicks Save or Delete, confirmation messages appear at the top of the form to inform the user the record was successfully saved or deleted.

Close tab keyboard shortcut refinement

A new keyboard shortcut provides an alternate method for closing an active tab (application). This shortcut applies to all currently supported browsers and versions.

Timeout warning improvements

A new user-friendly timeout warning informs you when your Advance session is about to expire due to inactivity. If you are inactive, a message will appear approximately one minute before the timeout is reached. When this message appears, you will have the option to continue the session or end the session and exit from Advance. As the timeout approaches the message will automatically count down from 60 seconds until it reaches zero.

Load ID List filter

A new filter option on the Load ID List form allows you to filter the list and display Public, Private, or both Public and Private lists. When you filter the list to display Private or both Public and Private lists, only lists that you created or to which you have access (based on your user ID) will appear in the list. Additionally, a new column on the Load ID List provides a visual indication of whether each list is public or private.

Default logic for Lookup controls

New functionality allows you to configure Advance Web to default values into fields designated as Lookup and Lookup Drop-Down form controls. This enhancement aims to make data entry more efficient and reduce the number of user steps.

Additional example forms

Additional example forms are included in Advance Web 9.8.1.0. These forms can be enabled to provide high-level information to a variety of users and serve as an additional gateway to useful information.

System performance

Technical aspects of several key areas were refined in order to improve system performance in Advance Web. These changes do not have any visual or workflow impact on the Advance Web user-interface.

Mass Add last used

When you perform a Mass Add, the system will remember the last type of data you Mass Added from each type of clipboard data.

Triggering a Contact Report combination form

New functionality allows you to specify the next action that will occur when you complete a task. Depending on the selected task status, the task will save without any additional actions (as in previous releases), a new Contact Report Task Combo form will appear for data entry, or a Contact Report form will appear for data entry.

Common combination forms

New functionality allows you to enter associated records at the same time through new combination forms. These new forms are: Contact Report & Task, Prospect & Assignment, and Proposal, Purpose & Assignment. Once enabled, these forms will assist in entering associated records in a timely fashion.



Allow Facebook profile photo to display on Entity Header

In order to enhance an entity's profile, Advance Web allows you to display a Facebook user's profile picture on the Entity Header of their record in Advance Web. Once the functionality is enabled, and you identify the Facebook user via their unique Facebook ID or username through the eContact form, their profile picture will appear in the Entity Header when you access their profile in Advance Web.

Job Type added to Employment Link on Address form

The Employment Link drop-down now displays the Job Type associated with the employment record. When the Address Type is a Business address (tms_address_type.business_ind = Y), this field allows you to link the address to the employment record.

Comment field added to Volunteer Activity

A new comment field was added to the Volunteer Activity form and database table. This is a free text field and can contain a maximum of 255 characters.

Address Type default

A new option in the TMS Record Type view allows you to associate address types with record types. When this link is established and you add a new address for an entity (person or organization), Advance will default the address type associated with the entity's record type in the Address Type field on the Address, Add Person or Add Organization forms.

Membership Batch Ledger renewal improvements

In order to align Advance Web with Advance Windows, several modifications were made to improve Membership Batch Ledger functionality. These modifications include an updated sort order of the Memb # drop-down, the ability to indicate a default membership on renewals, improved use of renewal functionality, and the ability to remove the reinstate functionality.

Paste Clipboard IDs for reversals and modifications

In order to align Advance Web with Advance Windows, this release allows users to paste gift, pledge, membership or dues payment transaction IDs from a clipboard into the "Receipt #" or "Memb/Pmt#" field for modifications and reversals. Copy to Clipboard options were expanded on several Membership-related forms.

Variable payment plans for memberships

In order to align Advance Web with Advance Windows, this release allows users to designate a payment plan as one to be paid on an irregular schedule and/or with irregular amounts.

Increased length of Appeal Code and Appeal Description

Gift Appeal Code and Membership Appeal Code were increased to 15 characters, and the Description for each of these codes now consistently supports 60 characters. These database changes resulted in the modification of multiple forms to accommodate new field lengths.

Recurring Dues Payments

New functionality allows you to indicate that memberships will be paid by recurring Electronic Fund Transfer (EFT), Payroll Deduction or Credit Card payment. Additionally, a new process allows an authorized user to create dues payment transactions for these scheduled recurring dues payments, thereby saving the time previously required to manually create the transactions each month or period.

Events Mass Registration

New functionality enhances the invitation and registration processes and allows you to update multiple participants, invitations and registrations simultaneously.

Prevent transaction entry for virtually deleted entities

In order to align Advance Web with Advance Windows, this release includes functionality that prevents virtually deleted entities from being associated with new gifts, pledges and matching gifts. When the ID of an entity that is virtually deleted is entered during transaction entry in the Gift Entry Ledger, Advance will flag that entity as ineligible and prevent the transaction from being entered using that ID.

Gift Aid

This release introduces new functionality that supports United Kingdom Gift Aid rules. These rules allow institutions in the United Kingdom to claim funds on eligible gifts from Her Majesty's Revenue and Customs (HMRC).

iModules Encompass biographic refinements

This release introduces support for pushing and pulling additional types of biographic attributes between Advance and iModules Encompass, respectively.

iModules Encompass gift refinements

A new user interface has been introduced to Advance Web's Encompass Connector application for gift mapping and gift profiles. In addition, existing functionality for manually and auto-scheduling requests has been enhanced to allow gifts to be pulled from Encompass on their own accord. This new functionality allows for more flexibility and transparency with these transactions.

Advance can now recognize an appeal code associated with an Encompass campaign and map it to the pulled gift's entry in Gift Batch.

MLP and iModules Encompass compatibility

New support allows institutions to use iModules Encompass and MLP (Multi-Location Processing) simultaneously, in the same Advance environment.



Log File Analysis Tool

A new log file analysis tool simplifies the process of reviewing the Advance database log files after a database upgrade or installation. This tool expedites the review process by generating a list that includes or excludes specified errors. This eliminates the need to manually review each log file individually.

Site Help templates

New Site Help templates provide a standard starting point for institutions that wish to implement Site Help, thereby reducing the amount of time it takes to implement and deploy.

Attachment Migration Utility

The Attachment Migration Utility converts attachments to a format recognized by both Advance Windows and Advance Web. Use of this utility is only required when documents entered through Advance Windows are not viewable in Advance Web.

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@ellucian.com prior to beginning the database upgrade or installation.

Please refer to the Advance 9.8.1.0 Database Installation Instructions for additional information. If you are upgrading from a release prior to 9.7.0.0, please note the Advance 9.7.0.0 release documentation contains information that must be followed in order to ensure a successful upgrade to 9.7.0.0 before upgrading to 9.8.1.0.

Current Version	Upgrade Instructions
Advance Web prior to 9.7.0.0	Upgrade to Advance Web 9.7.0.0, then upgrade to Advance Web 9.8.1.0
Advance Web 9.7.0.0	Upgrade directly to Advance Web 9.8.1.0
Advance Web 9.8.0.0	Upgrade directly to Advance Web 9.8.1.0
Advance Windows prior to 9.7.0.0	Upgrade to Advance Web 9.7.0.0, then upgrade to Advance Web 9.8.1.0
Advance Windows 9.7.0.0	Upgrade directly to Advance Web 9.8.1.0
Advance Windows 9.8.0.0	Upgrade directly to Advance Web 9.8.1.0
Advance Windows 9.8.1.0	No database upgrade necessary
No Advance database installed	Install a new Advance Web 9.8.1.0 database



New Features and Functionality

Advance Web 9.8.1.0 introduces new features and functionality, as described below.

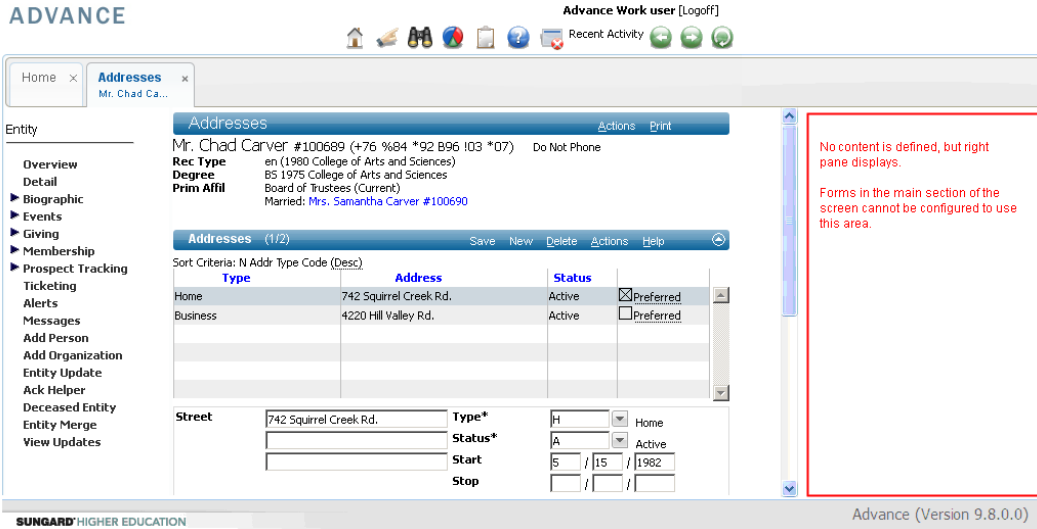
User-Experience Improvements

Right pane refinements

Most Advance Web pages display the application and associated forms on the left side of the screen and a blank section (referred to as the Right Pane) on the right side of the screen. A small number of Advance Web pages display information in the right pane, specifically, the Extra Information Form (EIF) that displays during gift, pledge and membership entry.

In order to better utilize the space on the right side of the screen, Advance Web automatically collapses the Right Pane so that only the information on the left side of the screen will appear when there is no information to display in the Right Pane. This allows you to configure forms to be wider than the standard form width (543px) and display additional information and form controls.

Prior to Advance Web 9.8.1.0:



Effective with Advance Web 9.8.1.0:

The screenshot shows the 'Advance' web application interface. At the top, it says 'ADVANCE' and 'Advance Work user [Logout]'. Below that, there are navigation icons and a 'Recent Activity' button. The main content area is titled 'Addresses' and shows details for 'Mr. Chad Carver #100689 (+76 %84 *92 896 103 *07) Do Not Phone'. It lists his 'Res. Type' as 'en (1980 College of Arts and Sciences)', 'Degree' as 'BS 1975 College of Arts and Sciences', and 'Prim Affil' as 'Board of Trustees (Current)'. Below this is a table of addresses:

Type	Address	Status	Preferred
Home	742 Squirrel Creek Rd.	Active	<input checked="" type="checkbox"/>
Business	4220 Hill Valley Rd.	Active	<input type="checkbox"/>

At the bottom, there are input fields for 'Street', 'Type*', 'Status*', 'Start', and 'Stop'. The 'Status*' dropdown is set to 'A' (Active) and the 'Start' date is '5 / 15 / 1982'. On the right side of the screen, there are three red annotations: 'Right pane is collapsed and no longer a separate section of the screen.', 'Forms defined with form_width > 543px will expand into this part of the screen.', and 'Vertical scroll bar now appears on the far right side of the screen.' with an arrow pointing to the scroll bar.

For additional information on configuring the form width on forms, please refer to the *Advance Web Configuration Examples*.

Last Viewed refinements

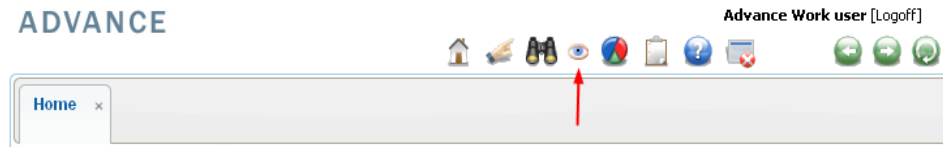
The default Advance Web Home Page displays the Last Viewed form, which provides access to recently viewed information via hyperlinks. Effective with Advance Web 9.8.1.0, the Last Viewed form was streamlined to consistently display Entity, Prospect and Contact Report hyperlinks. Previously, hyperlinks on this form changed dynamically, based on what information was recently viewed by the user.

Last Viewed			Actions	Help
Entity	Prospect	Contact Report		
Ms. Trudy Leola Bailey (#1008799)	Mr. Jarvis Turnbaugh (#101498)	Ms. Teri Wybrowski (#100285)		
Mr. Ross Baker (#1005234)	Ms. Robin Beverly Hamilton (#1014...	Mr. Archie D. Nelson (#101703)		
Mr. Henry Nicholas Austin (#10095...	Ms. Grace Ana Adkins (#101492)	Ms. Deb Smiegel (#101229)		
Ms. Charmaine Sandy Albert (#100...	Mr. Gabe Rialto (#101470)	Mr. Micheal T Berard (#102435)		
Mr. Timothy Ronald Allen (#1005071)	Mr. Kent Michael Evans (#101452)	Christopher Michiel Sawtelle, MD (...)		
Mr. Patrick Alexander (#1009829)	Mr. Alberto Abbott (#101533)	Dr. Sean Adam McCarthy (#102434)		
Major General Edward E Bowman (...)	Ms. Cecily Parker (#101458)	Mr. Micheal T Berard (#102436)		
Mr. Chad Carver (#100689)	Ms. Petula Jane Dunn (#101536)	Christopher Michiel Sawtelle, MD (...)		

Note

AWC System Option 109 controls the number of rows that appear in the Last Viewed form. By default, this system option is set to 6. As illustrated in the graphic above, additional rows will appear when the value is increased.

Additionally, a new Main Menu item allows you to access last viewed information for more than 18 types of records. This includes the categories that were previously accessible via the Last Viewed form, as well as other types of records often accessed by users.



When you select the Last Viewed icon, the Last Viewed list appears and allows you to view and access the most recently viewed records in a variety of categories. By default, Entity will be selected the first time you open the list during your Advance Web session. If you select a different category, then close the list, Advance Web will remember that selection and automatically open that category the next time you open Last Viewed. If a user has not accessed any records in a category, that category will not display. The following types are available:

- Allocation
- Application
- Committee
- Contact Report
- Contract/Grant
- Dues Profile
- Entity
- Event
- Gift Profile
- Lookup
- Matching Gift Profile
- Membership Profile
- Program Prospect
- Pledge Profile
- Proposal
- Prospect
- Report

For additional information on using the Last Viewed form, please refer to the *Advance Web Navigation Guide*.

Database structures and new stored procedure

A new database table, `zz_user_history`, stores the information that displays in the updated version of the Last Viewed form. Each time a user accesses one of the Last Viewed types, a row is stored in this table. The `zz_last_viewed` table, used in previous releases, is obsolete as of Advance Web 9.8.1.0. For additional information on `zz_user_history`, please refer to the *Advance System Data Elements*.

As the new `zz_user_history` increases in size, you may find it useful, or necessary to purge the contents of the table. Each institution can, at their discretion, purge the contents of this table by executing the stored procedure named `zz_purge_user_history`. This stored procedure requires an Oracle input date parameter, for example `to_date()`. All entries in the table prior to the specified date will be deleted from the table. For additional information on the procedure, please refer to the *Advance Deferred Processing User Guide*.

Upgrade Considerations

When you upgrade to Advance Web 9.8.1.0, the database upgrade will automatically migrate the data from the now obsolete `zz_last_viewed` table to the new `zz_user_history` table. When you access Advance Web 9.8.1.0 for the first time, Last Viewed information will appear in the updated version of the form due to the migration process that occurs during the database upgrade. No additional steps are required to migrate the data. Data is mapped as follows when you upgrade to Advance 9.8.1.0:

<code>zz_last_viewed</code>	<code>zz_user_history</code>
N/A	<code>user_history_id</code>
<code>user_name</code>	<code>user_name</code>
<code>time_stamp</code>	<code>time_stamp</code>
N/A	<code>history_type</code>
<code>page_id</code>	<code>id_type</code>
<code>last_id</code>	<code>id_value</code>
<code>location_id</code>	<code>location_id</code>

Removing the Last Viewed form and Last Viewed icon

By default, the Last Viewed form and icon are enabled. For information on disabling this functionality, please refer to the *Advance Web Configuration Examples*.

Sorting data using metadata

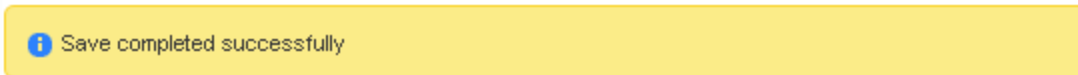
A new form option (form sort expression) allows you to specify a default sort on forms. This may be of particular importance on forms that contain data that might be best viewed in a certain order. Since this type of configuration is stored in the database as metadata, the sort will be retained when you upgrade to future versions of Advance, thereby eliminating the need to re-implement this configuration. For example, you can view telephone numbers in the Telephone List form in the Telephone application by area code in ascending order, then by telephone number in descending order.

For additional information on how to specify a default sort using metadata, please refer to the *Advance Web Configuration Examples*.

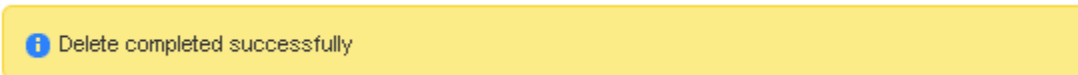
Save and Delete confirmation messages

Save and Delete confirmation messages enhance the user-experience by providing a visual indication that the requested save or deletion was successful. When a user with maintenance rights clicks Save or Delete, confirmation messages appear at the top of the form to inform the user the record was successfully saved or deleted.

The following message appears when a record is successfully saved.



The following message appears when a record is successfully deleted.



Close tab keyboard shortcut refinement

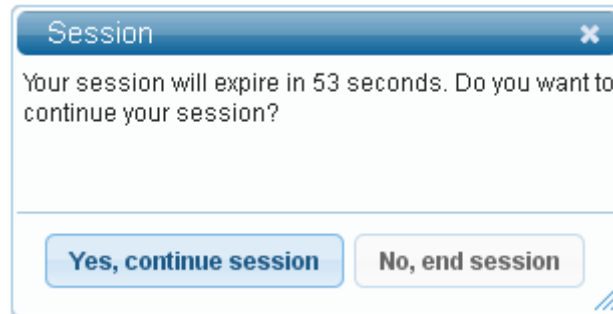
A new keyboard shortcut provides an alternate method for closing an active tab (application). This shortcut applies to all currently supported browsers and versions. The new keyboard shortcut for closing the current open tab is Ctrl + Shift + C. The previous keyboard shortcut, Alt + F4, is no longer utilized by Advance Web, but might have inherent functionality for certain browsers.

Note

If Messenger Companion is enabled in Internet Explorer 9, this shortcut will open Messenger Companion instead of closing the active tab in Advance Web. Please refer to [Microsoft's Website](#) for additional information in disabling Messenger Companion.

Timeout warning improvements

A new user-friendly timeout warning informs you when your Advance session is about to expire due to inactivity. If you are inactive, a message will appear approximately one minute before the timeout is reached. When this message appears, you will have the option to continue the session or end the session and exit from Advance. As the timeout approaches the message will automatically count down from 60 seconds until it reaches zero.



- If you continue your session by clicking 'Yes, continue session' or press Esc, you will be returned to Advance
- If you end your session, you will be navigated to the logon page.
- If you do not respond to the message before the counter reaches zero, you will be automatically logged out and navigated to the logon page. A message at the top of the logon page informs you your session has ended due to inactivity.

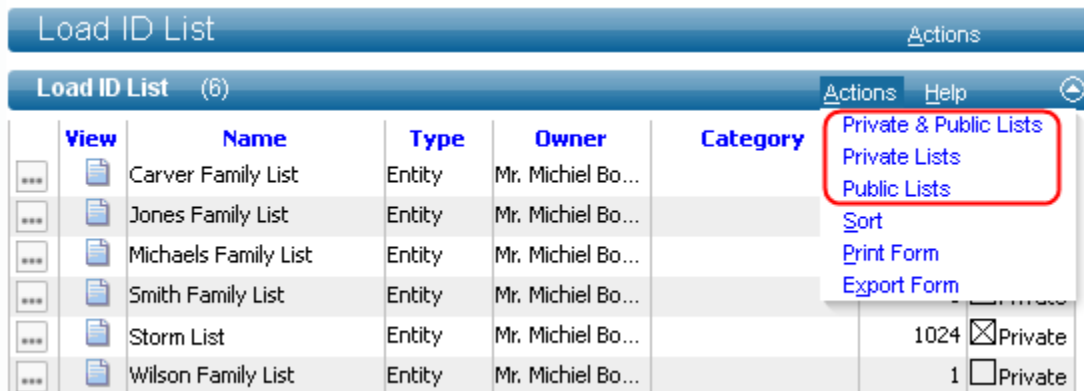
As part of this new functionality, you are now considered active when you perform any activity in Advance, regardless of whether that activity requires interaction with the server. Thus, navigating back-and-forth between tabs or reviewing information without saving is now considered activity. Previously, activity was determined by whether you performed interaction that required a request from the server, i.e., clicking New, Save, or Delete, performing a Lookup, etc.

For additional information on setting default session and execution timeouts, please refer to the *Advance Web Configuration Examples*.

Load ID List filter

A new filter option on the Load ID List form allows you to filter the list and display Public, Private, or both Public and Private lists. When you filter the list to display Private or both Public and Private lists, only lists that you created or to which you have access (based on your user ID) will appear in the list.

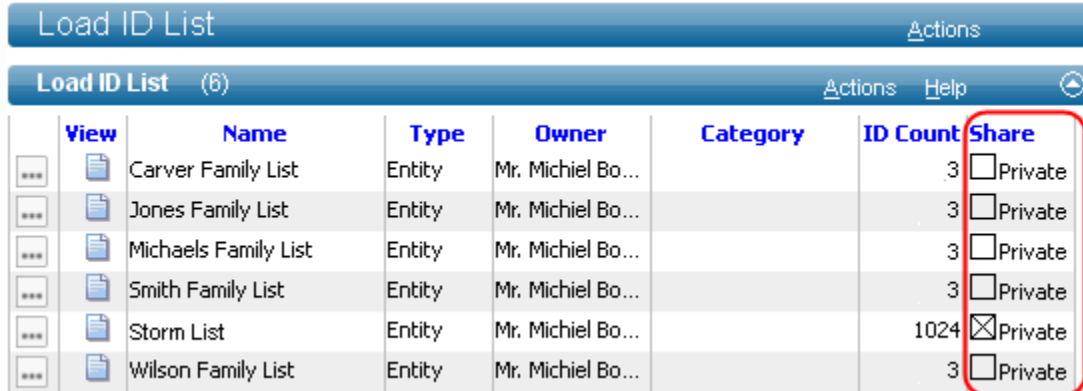
By default, the list displays Private & Public Lists.



The screenshot shows the 'Load ID List' interface. At the top, there is a header bar with 'Load ID List' and an 'Actions' button. Below this is a sub-header bar with 'Load ID List (6)', 'Actions', and 'Help'. The main table has columns: 'View', 'Name', 'Type', 'Owner', 'Category', and 'Share'. The 'Share' column contains a count and a checkbox for 'Private'. A dropdown menu is open over the 'Category' column, showing options: 'Private & Public Lists', 'Private Lists', 'Public Lists', 'Sort', 'Print Form', and 'Export Form'. The 'Private & Public Lists' option is highlighted with a red box.

View	Name	Type	Owner	Category	ID Count	Share
...	Carver Family List	Entity	Mr. Michiel Bo...			
...	Jones Family List	Entity	Mr. Michiel Bo...			
...	Michaels Family List	Entity	Mr. Michiel Bo...			
...	Smith Family List	Entity	Mr. Michiel Bo...			
...	Storm List	Entity	Mr. Michiel Bo...		1024	<input checked="" type="checkbox"/> Private
...	Wilson Family List	Entity	Mr. Michiel Bo...		1	<input type="checkbox"/> Private

Additionally, a new column on the Load ID List provides a visual indication of whether each list is public or private. This indicator allows you to view the privacy status of each ID List at a summary level and eliminates the need to drill down on each list to view the same privacy status.



The screenshot shows the 'Load ID List' interface with a new 'Share' column. The 'Share' column contains a checkbox for 'Private'. The 'Storm List' row has a checked checkbox, while the others are unchecked. A red box highlights the 'Share' column.

View	Name	Type	Owner	Category	ID Count	Share
...	Carver Family List	Entity	Mr. Michiel Bo...		3	<input type="checkbox"/> Private
...	Jones Family List	Entity	Mr. Michiel Bo...		3	<input type="checkbox"/> Private
...	Michaels Family List	Entity	Mr. Michiel Bo...		3	<input type="checkbox"/> Private
...	Smith Family List	Entity	Mr. Michiel Bo...		3	<input type="checkbox"/> Private
...	Storm List	Entity	Mr. Michiel Bo...		1024	<input checked="" type="checkbox"/> Private
...	Wilson Family List	Entity	Mr. Michiel Bo...		3	<input type="checkbox"/> Private

For additional information on ID Lists and the Clipboard, please refer to the *Advance Web Navigation Guide*.

Default logic for Lookup controls

New functionality allows you to configure Advance Web to default values into fields designated as Lookup and Lookup Drop-Down form controls. This enhancement aims to make data entry more efficient and reduce the number of user steps.

By specifying the appropriate value (token, literal, etc.) in the Data field on the form control in the Advance Configuration Utility, you can specify what default value will appear in that field when the user accesses the form.

X	Y	Control Name
880	40	id_number_2_2134
90	50	contact_type_t_2127
890	50	contact_type_2124
90	60	contact_purpose_t_212
890	60	contact_purpose_2120
9	65	80086_unit_code_t
10	65	80086_unit_code
90	70	obj_254728021_2138
890	70	author_id_number_2113
90	80	description_t_2132
890	80	description_2131
90	90	summary_t_2161
890	90	text_place_holder_217
890	95	image_spell_checker
80	100	obj_254728028_2144
880	100	program_code_2145
100	110	initiated_by_t

Name:	author_id_number_2113
Type:	Lookup DropDown
Sequence:	23
X Position:	890
Y Position:	70
Row Span:	1
Column Span:	3
FK Type:	
Alignment:	Left
Validation:	4
HTML ID:	author_id_number_2113
Data:	<ENTITYID>
Class:	widedataentryselect
Field Name:	AUTHOR_ID_NUMBER
Base Table:	entitylstaff
Other Attrib:	
Link Key 1:	
Link Key 2:	
Max Length:	10
Value Col:	0
Display Col:	1
Tab Order:	0
Required:	<input checked="" type="checkbox"/>
Locked:	<input type="checkbox"/>
Hidden:	<input type="checkbox"/>

For additional information, please refer to the *Advance Web Configuration Examples*.

Additional Example Forms

Additional example forms are included in Advance Web 9.8.1.0. These can be enabled to provide high-level information to a variety of users and serve as an additional gateway to useful information. These forms can be modified to suit the needs of your institution or organization.

The following new example forms are included in this release:

- Appeal Assignment – Report
- Bio Changes, Central Calendar
- Committee Assignments
- Contact Summary
- Event Preferences and Restrictions
- Open Assignment Requests
- Open Research Requests

- Prospect Inactivity
- Recent 1st Time Annual Fund Donors (\$5k+)
- Relationship Tree
- Scholarship Recipients
- Unassigned Prospects

For additional information, please refer to the *Advance Web Configuration Examples*.

System performance

Technical aspects of the following areas were refined in order to improve system performance in Advance Web. These changes do not have any visual or workflow impact on the Advance Web user-interface:

- Address Maintenance
- Marital Maintenance
- Gift Batch Control Transaction Maintenance
- Navigation to Mass Update
- Viewing the Transaction List in DataLoader for large batches.
- DataLoader bulk posting for Address and Telephone
- DataLoader/Mass Add of Appeals
- Funding Purpose Tree with a large number of Allocations

Mass Add last used

When you perform a Mass Add, the system will remember the last type of data you Mass Added from each type of clipboard data. If you Mass Add more than one type of data at one time, it will record only the first type in the underlying DataLoader batch. If no memory has been recorded for a particular clipboard type it will default to the first type in the list. If you are subsequently denied security to perform a certain type of data after you have already done so, it will default to the first type in the list. This functionality is useful for those users that regularly Mass Add the same type of data from particular types of clipboards.

Prospect Tracking

Triggering a Contact Report combination form

New functionality allows you to specify the next action that will occur when you complete a task. Depending on the selected task status, the task will save without any additional actions (as in previous releases), a new Contact Report Task Combo form will appear for data entry, or a Contact Report form will appear for data entry.

These three options are available to tasks associated with the following contexts:

- Contract/Grant
- Entity
- Program Prospect
- Proposal
- Prospect

The following scenarios describe how Advance Web will behave with the two new options.

Scenario 1 (Contact Report Task Combo form)

- 1 You update the current task's status to complete.
- 2 The form automatically opens a Contact Report and Task Combo form, with defaults.
- 3 You enter data for the new Contact Report and Task.
- 4 You save the completed Task, new Contact Report and new Task simultaneously.

Scenario 2 (Contact Report only)

- 1 You update the current task's status to complete.
- 2 The form automatically opens a Contact Report form with defaults.
- 3 You enter data for the new Contact Report.
- 4 You save the completed Task and Contact Report simultaneously.

Contact Report Task Combo Setup

Use of this new functionality is optional and is disabled by default. No setup steps need to be performed if you wish to perform Contact Report and Task entry as in previous releases.

To enable this new functionality, update the following TMS views via the TMS Application in Advance Web:

- 1 Task Status (tms_task_status)
- 2 Task Assignment Type (tms_task_assign_type)

For additional information on TMS Maintenance, please refer to the *Advance TMS User Guide*; for additional information on entering Contact Reports and Tasks using this option, please refer to the *Advance Web Prospect Tracking User Guide*.

Common combination forms

New functionality allows you to enter associated records at the same time through new combination forms. These new forms are: Contact Report & Task, Prospect & Assignment, and Proposal, Purpose & Assignment. Once enabled, these forms will assist in entering records in a timely fashion. These combo forms can be enabled in the locations specified below.

Contact Report & Task Form

- Entity Overview
- Prospect Overview
- Proposal Overview
- Program Overview

Prospect & Assignment Form

- Entity Overview

Proposal, Purpose & Assignment Form

- Prospect Overview

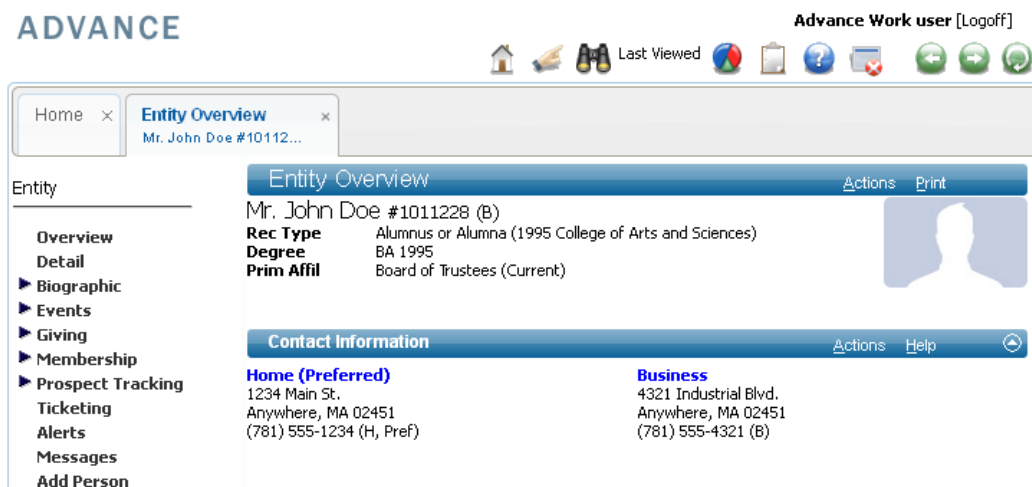
For additional information on enabling these forms and entering data using these forms, please refer to the *Advance Web Prospect Tracking User Guide*.

Facebook profile picture on Entity Header

In order to enhance an entity's profile, Advance Web allows you to display a Facebook user's profile picture on the Entity Header of their record. Once the functionality is enabled, and you identify the Facebook user via their unique Facebook ID or username through the eContact form, their profile picture will appear in the Entity Header when you access their profile in Advance Web.



For additional information on the Facebook Graph API, please refer to <https://developers.facebook.com/docs/reference/api/>.



ADVANCE Advance Work user [Logoff]

Home x Entity Overview x
Mr. John Doe #1011228...

Entity

- Overview
- Detail
- ▶ Biographic
- ▶ Events
- ▶ Giving
- ▶ Membership
- ▶ Prospect Tracking
- Ticketing
- Alerts
- Messages
- Add Person

Entity Overview Actions Print

Mr. John Doe #1011228 (B)

Rec Type Alumnus or Alumna (1995 College of Arts and Sciences)
Degree BA 1995
Prim Affil Board of Trustees (Current)

Contact Information Actions Help

Home (Preferred) 1234 Main St. Anywhere, MA 02451 (781) 555-1234 (H, Pref)	Business 4321 Industrial Blvd. Anywhere, MA 02451 (781) 555-4321 (B)
--	--

For additional information on enabling the display of Facebook profile pictures on the Entity Header, please refer to the *Advance Web Configuration Examples*.

For additional information on associating Facebook IDs or usernames with entity records, please refer to the *Advance Web Bio User Guide*.

Job Type added to Employment Link on Address Form

The Employment Link drop-down now displays the Job Type associated with the employment record. When the Address Type is a Business address (tms_address_type.business_ind = Y), this field allows you to link the address to the employment record. When you open the Empt Link drop-down on the Address form, each employment record for the entity will appear and each record will display the following information:

- Line 1: **Employer Name**, (Primary indicator) - Title
- Line 2: Type: Job Type (Current indicator) (Sequence number)

(none)

Complete Auto Care, Inc. (Primary) - Mechanic
Type: Primary Employer (Current) (2)

NIMB America - Public Liason
Type: Primary Employer (1)

Comment field added to Volunteer Activity

A new comment field was added to the Volunteer Activity form and database table. This is a free text field and can contain a maximum of 255 characters.

Technical

This new field, in the volunteer activity database table, is vol_activity.xcomment.

Vol Year	<input type="text" value="2011"/>	Status	<input type="text"/>
Vol Activity	<input type="text" value="CC"/> Campaign Committee	Vol Level	<input type="text" value="CM"/> Committee Member
Group	<input type="text"/>	Location	<input type="text" value="MC"/> Main Campus
Program	<input type="text"/>	Start	<input type="text" value="9"/> / <input type="text" value="12"/> / <input type="text" value="2011"/>
Unit	<input type="text"/>	Stop	<input type="text"/> / <input type="text"/> / <input type="text"/>
Vol Rating	<input type="text"/>		
Staff ID	<input type="text"/>		
Vol Source	<input type="text"/>		
Comment	<input type="text"/>		

Address Type Default

A new option in the TMS Record Type view (tms_record_type) allows you to associate address types with record types. This functionality is available on the following forms:

- Address
- Add Person
- Add Organization

When the link is established and you add a new person or organization record, the address type will default to the type associated with the record type selected. For new addresses for existing entities, the address type will default to the entity's primary record type.

Since the new Address Type field in the TMS Record Type view is not required, you may wish to add a default address type on some record types, but not on others. If you add a new address record for an entity whose record type doesn't have a corresponding address type in the Record Type view, Advance will default a value of Home (for person entities) and Business (for organization entities), as in previous releases.

When you access the TMS Record Type view you can establish the default through the new Address Type Default field. This field displays the value of None and all active and current values in tms_address_type.

The screenshot shows the 'TMS Edit Code Table' interface. At the top, there is a header 'TMS Edit Code Table' with an 'Actions' button. Below it, the table title is 'TMS Code Definition Record Type Table (tms_record_type)'. The table itself has two columns: 'Record Type Code' and 'Short Desc'. The rows are as follows:

Record Type Code	Short Desc
AL	Alumnus Alumna
CF	Corporate Foundation
CP	Corporation
CS	Fund Raising Consorita
DB	DAF - Business
DO	DAF - other organization

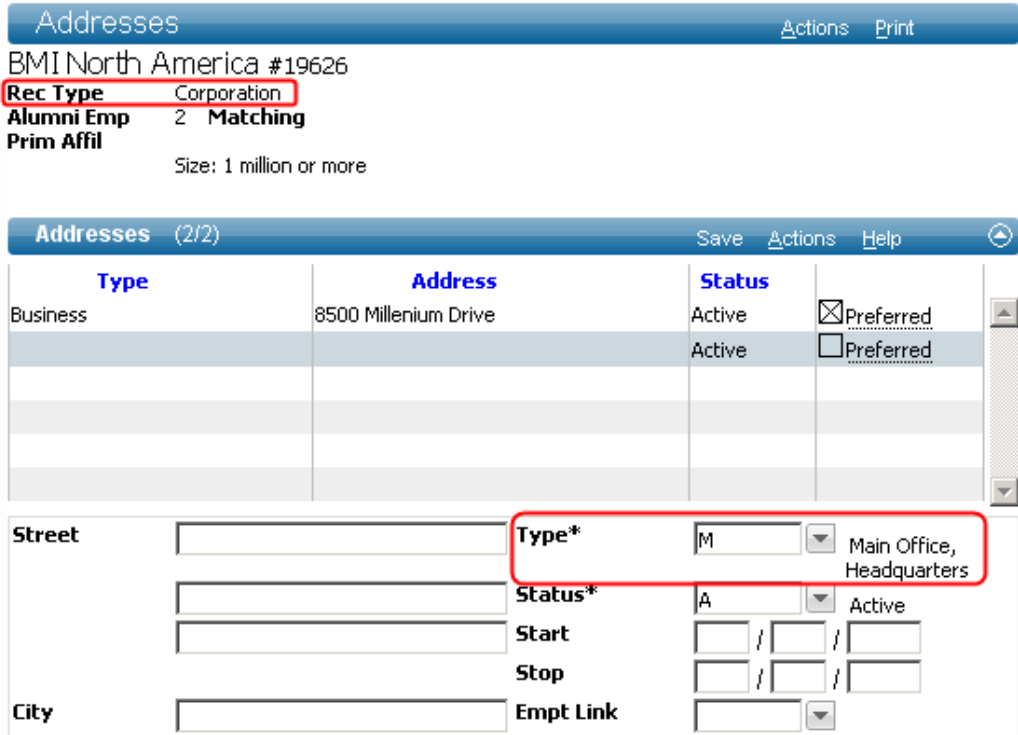
Below the table is a form for editing a record type code. The fields are:

- Record Type Code*:** CP
- Short Desc*:** Corporation
- Entity Type:** (dropdown menu)
- Credit2**
- Cfae Code:** E Corporation
- Rec Priority:** 1
- Person Or Org**
- Default:** 0 Organization
- Class:** 3 Disallow
- School:** 3 Disallow
- Long Desc:** (text field)
- Address Type Default:** M Main Office, Headquarters (highlighted with a red box)

Once the link is established, Advance will default the address type in the Address Type field when you add a new address for an entity with that record type. The default can be overridden.

 **Note**

This functionality does not apply to existing address records. If you update an existing address record, Advance will not change the address type. Advance will only default the Address Type when you add a new Address via the Address, Add Person or Add Organization forms.



Addresses Actions Print

BMI North America #19626

Rec Type Corporation

Alumni Emp 2 **Matching**

Prim Affil Size: 1 million or more

Addresses (2/2) Save Actions Help

Type	Address	Status	
Business	8500 Millenium Drive	Active	<input checked="" type="checkbox"/> Preferred
		Active	<input type="checkbox"/> Preferred

Street

Type* Main Office, Headquarters

Status* Active

Start / /

Stop / /

City

Empt Link

Upgrade considerations

Advance will not update any address records for any entities (person or organization) during the upgrade to Advance 9.8.1.0 as a result of this new feature. Additionally, the Address Type Default field in tms_record_type will not be populated during the upgrade or installation process. When your upgrade to Advance 9.8.1.0 is complete, this field will be blank on all Record Type codes.

Membership

Membership Batch Ledger Renewal Improvements

In order to align Advance Web with Advance Windows, several modifications were made to improve Membership Batch Ledger functionality. These modifications include:

- The Member # drop-down now sorts by Active and Paid memberships, then descending by Stop Date, then using the hierarchy order for the status.
- System Option 298 indicates whether a membership will default into the Memb ID field in the Membership Entry Ledger when entering a membership renewal.
- System Option 299 indicates whether the Membership Batch defaults will be overridden by the previous membership's data when renewing a membership and whether you can modify the Membership Type, Rate and Club values..
- System Option 300 indicates whether the reinstate button will display on the Membership Entry Ledger and Membership Batch Defaults.



Note

System options 298, 299 and 300 were first introduced in a prior release of Advance Windows. As such, these system options are not new to the Advance database in Advance Web 9.8.1.0.

For additional information, please refer to the *System Options Reference* and the *Advance Web Membership User Guide*.

Paste Clipboard IDs for Reversals and Modifications

In order to align Advance Web with Advance Windows, this release allows you to paste ID numbers from the Clipboard directly into the Reversals and Modifications form of the Batch Membership Entry Ledger. In previous versions of Advance Web, you had to manually enter each transaction ID into the Reversals and Modifications form, even if the ID was included on a clipboard of IDs that you wanted to reverse. The new functionality will increase efficiency and decrease the likelihood of user-error during the manual entry in the Reversals and Modifications form.

For additional information, please refer to the *Advance Web Membership User Guide*.

Variable Payment Plans for Membership

In order to align Advance Web with Advance Windows, this release allows users to designate a payment plan as one to be paid on an irregular schedule and/or with irregular amounts. As part of this new functionality:

- A new Membership Payment Plan application and form allows you to record the date and amount parameters for the variable payment plan.
- Advance Web recognizes payment plans designated as variable (when the Variable indicator for the code in `tms_memb_pmt_plan` is set to 'Y') and performs the necessary validations at the time of membership entry.
- For memberships with a variable payment plan, Advance Web creates dues payment schedules based on the variable schedule established on the new Membership Payment Plan application.

For additional information on Variable Payment Plans for Membership, please refer to the *Advance Web Membership User Guide*.

Increased length of Membership Appeal Code and Description

Membership Appeal Codes were increased to 15 characters, and the Description for each of these codes now consistently supports 60 characters. These database changes resulted in the modification of multiple forms to accommodate new field lengths. For a complete list of database changes, please refer to the section of this document entitled Table Changes.

Recurring Dues Payments

New functionality allows you to indicate that memberships will be paid by recurring Electronic Fund Transfer (EFT), Payroll Deduction or Credit Card payment. Additionally, a new process allows an authorized user to create dues payment transactions for these scheduled recurring dues payments, thereby saving the time previously required to manually create the transactions each month or period.

As part of this feature, you can:

- Designate which payment types can be linked to recurring payments via a new option in `tms_memb_pay_type`.
- Store bank account types in a new TMS view named `tms_memb_recur_acct_type`.
- Indicate the types of recurring payments users may enter in a new TMS view named `tms_memb_recurring_pmt_type`
- Indicate which memberships will be paid by EFT, Payroll Deduction or recurring Credit Card.
- Associate recurring payment types with transactions on the Membership Batch Defaults and Membership Details forms.
- View Recurring Payment information via the Membership Batch Proof Report.
- Store and maintain details about the EFT, Payroll Deduction or Credit Card payment information using a new form with a new underlying database table.
- Maintain values in new system options (330-333), which allow you to indicate which recurring dues payments you want to process (EFT, Payroll Deduction, etc.), the payment type (Tender) to apply to those dues payments created, the User Group to assign to created batches and transactions, and the maximum number of dues payments to create per batch.
- Run a new stored procedure named `zz_build_dues_payments`, which utilizes new system options 330-333 and scheduled recurring dues payments to create batches and dues payment transactions.
- Store and maintain recurring payment details (bank account, bank name, expiration date, etc.) using a new Recurring Payment Update application.
- Lookup memberships using a new Recurring Payment field on the Membership Lookup.



Note

This feature does not provide functionality related to online credit card processing.

This feature does not provide functionality for automatically generating membership renewals for expired memberships that were paid by recurring EFT, Credit Card or Payroll Deduction.

For additional information, please refer to the *TMS User Guide*, *System Options Reference*, *Membership Data Elements*, *Deferred processing User Guide*, or the *Advance Web Membership User Guide*.

Events

Events Mass Registration

This release introduces the following new functionality that enhances the invitation and registration processes. For additional information, please refer to the *Advance Web Events User Guide*.

Mass Invite Enhancements

- Sort and filter Saved ID Lists
- Select one record, a subset of records or all records for invitations

Mass Registration for One or More Invitees

- Mass Registration option on the Invitee's Action Menu
- Select one record, a subset of records or all records for registration
- Set the Registration status and optionally the Response Date, Invitation Status and Participant status
- View, print and export registration confirmation

Mass Registration from Entity Clipboard & Saved ID Lists

- New application accessible from Event Profile
- Select records from a Saved ID List or from the Entity Clipboard
- Select one record, a subset of records or all records for registration
- Set the Registration status and optionally the Response Date, Invitation Status and Participant status
- View, print and export registration confirmation

Mass Update for Invitation Status

- Filter invitees by status
- Update statuses for one record, a subset of records or all records

Mass Update for Registration Status

- Filter registrants by status
- Update statuses for one record, a subset of records or all records
- Clear associated participant and fee records

Mass Update for Participation Status

- Filter participants by status
- Update statuses for one record, a subset of records or all records

Gift

Increased length of Gift Appeal Code and Description

Gift Appeal Codes were increased to 15 characters, and the Description for each of these codes now consistently supports 60 characters. These database changes resulted in the modification of multiple forms to accommodate new field lengths.

For a complete list of database changes, please refer to the section of this document entitled Table Changes.

Paste Clipboard IDs for Reversals and Modifications

In order to align Advance Web with Advance Windows, this release allows you to paste ID numbers from the Clipboard directly into the Reversals and Modifications form of the Batch Gift Entry Ledger. In previous versions of Advance Web, you had to manually enter each transaction ID into the Reversals and Modifications form, even if the ID was included on a clipboard of IDs that you wanted to reverse. The new functionality will increase efficiency and decrease the likelihood of user-error during the manual entry in the Reversals and Modifications form.

For additional information, please refer to the *Advance Web Gift User Guide*.

Prevent transaction entry for virtually deleted entities

In order to align Advance Web with Advance Windows, this release includes functionality that prevents virtually deleted entities from being associated with new gifts, pledges and matching gifts. When the ID of an entity that is virtually deleted is entered during transaction entry in the Gift Entry Ledger, Advance will flag that entity as ineligible and prevent the transaction from being entered using that ID.

For additional information, please refer to the *Advance Web Gift User Guide*.

Gift Aid

New functionality supports United Kingdom Gift Aid rules. These rules allow institutions in the United Kingdom to claim funds on eligible gifts from Her Majesty's Revenue and Customs (HMRC).

After the installation and setup steps described later in this document are performed, transactions to a type where the Tax Efficiency Indicator is enabled should be entered in Advance Web. Once transactions are entered, Gift Aid processing should be initiated via the Tax Efficiency Procedure, `zz_gp_uk_tax_efficiency.sql`. This procedure will generate matching claims on transactions that are eligible for the government Gift Aid collection scheme. This procedure is located in the `db\zzsp\` directory. When run, this procedure examines all closed batches and creates a claim in `bg_claim` (by calling `apb_gm350`) against Inland Revenue for each of these Gift Aid gifts or payments where the donor amount is greater than zero. If the transaction is a modification, the original `matching_claim` is modified. The final step is to run Gift Processing and move the transactions from the temporary batch tables to the permanent gift tables.

Gift Entry, Claim Generation & Gift Processing - In a nutshell

- Enter gift and pledge transactions in a batch using a transaction type where the Tax Efficient Indicator check box is checked.
- Close the batch.
- Execute the `zz_gp_uk_tax_efficiency` procedure to generate claims.
- Execute the `zz_gp` procedure to process the gifts and associated claims.

Gift Modifications & Gift Processing - In a nutshell

- Modify gift and pledge transactions in a batch using a transaction type where the Tax Efficient Indicator check box is checked.
- Close the batch.
- Execute the `zz_gp_uk_tax_efficiency` procedure to delete the tax efficient claims.
- Execute the `zz_gp` procedure to process the modifications.

For additional information on the `zz_gp_uk_tax_efficiency` procedure, please refer to the Gift Aid Rules Appendix in the Advance Web Gift and Pledge User Guide.

Gift-Aid Report

The Gift-Aid Report allows you to reconcile the donations eligible for the Gift Aid scheme as well as update the matching claim form received indicator for those matches claim rows that were created as part of the `zz_gp_uk_tax_efficiency` procedure. Typically this report is run at the end of each month.

For additional information on the Gift Aid Report, please refer to the Gift Aid Rules Appendix in the Advance Web Gift and Pledge User Guide.

Gift Aid Eligible Form

The Gift Aid Eligible Form allows you to indicate whether an entity has confirmed they are eligible for the Gift Aid Scheme. The goal of this information is to provide you with the ability to confirm whether an entity is eligible and look historically at the entity's record with respect to the scheme.

For additional information on the Gift Aid Eligible Form, please refer to the Gift Aid Rules Appendix in the Advance Web Gift and Pledge User Guide.

Gift Aid Setup

After you upgrade to Advance Web 9.8.1.0, you must perform the following setup steps:

- 1 Enable system option 80 via the Advance Configuration Utility. This system option holds the Advance Entity ID number of the UK Inland Revenue organization.
- 2 Update the following TMS views via the TMS Application in Advance Web:
 - UK Tax Rate (zz_uk_tax_rate)
 - Transaction Type (tms_transaction_type)
 - Gift Aid Eligible Status (tms_gift_aid_eligible_status)

For additional information on system options, please refer to the *Advance System Options Reference*, and for additional information on TMS Maintenance, please refer to the *Advance TMS User Guide*.



iModules Encompass

Biographic Refinements

This release introduces support for the following types of data for use with the Encompass Connector:

- Address Preferred Indicator (Home & Business)
- Address Region Codes (Home & Business)
- Affiliation
- Alternate Email Address
- Alternate ID
- Children
- Committee Participation
- eContact
- Employment (Additional records & elements)
- Gift Club
- Mobile Phone
- Names (Alternate, Nickname & Maiden Name)
- Record Type
- Relationship
- Seasonal Address
- Solicitation Control
- Sport
- Spouse Information



Note

Previously, an entity's ethnic code and birth date information could be pushed to Encompass iModules, but couldn't be pulled back to Advance. Effective with this release, these attributes can be both pushed to Encompass iModules and pulled back to Advance.

For a complete list of fields that can be pushed or pulled between Advance and iModules Encompass, please refer to the *Encompass Connector Data Mapping* spreadsheet and for information on using the Encompass Connector, please refer to the *Advance Web Encompass Connector Reference*.

In order to accommodate these additional attributes, columns were added to existing database tables and several new database data transfer tables are included in the Advance schema. For a complete list of database changes, please refer to the section of this document entitled *Database Changes*.

TMS View Changes

The following TMS view changes were made in order to support the pushing and pulling of the new types of data listed above. For a complete list of TMS view changes in this release, please refer to the section of this document entitled *TMS Views*, and for a complete list of TMS Views in the Advance schema, please refer to the *Advance TMS User Guide*.

New Views

- tms_emp_attribute_1
- tms_emp_attribute_2
- tms_emp_attribute_3
- tms_emp_attribute_4
- tms_emp_attribute_5

Modified Views

- tms_data_source
- tms_econtact_source
- tms_email_type
- tms_ids_type
- tms_name_type

Employment

New attributes on the Employment form allow you to capture additional information about the entity's employment.

- Employee Attribute 1
- Employee Attribute 2
- Employee Attribute 3
- Employee Attribute 4
- Employee Attribute 5

These new fields were also added to the Employment Lookup to assist in locating records by these Employee Attributes. For additional information, please refer to the *Advance Web Bio User Guide* or *Advance Web Lookup User Guide*.

Gift Clubs

A new field, Data Source, allows you to track where the Gift Club record originated. This field is now available on the Gift Club form as well as the Gift Club Lookup to assist in locating records using this attribute. For additional information, please refer to the *Advance Web Bio User Guide* or *Advance Web Lookup User Guide*.

Sports

A new field, Data Source, allows you to track where the Sport record originated. This field is now available on the Sport form as well as the Sport Lookup to assist in locating records using this attribute. For additional information, please refer to the *Advance Web Bio User Guide* or *Advance Web Lookup User Guide*.

Encompass Connector – Advance Category Form

A new inquiry-only field, Date Modified Override, gives the system the ability to look at the date modified column on other tables besides the main table, using the alias 'x'. For additional information, please refer to the *Advance Web Encompass Connector Reference*.

Encompass Connector – Mapping Entries Form

A new inquiry-only field, Transform ID, uniquely identifies the type of data when the pull process pulls the data from Encompass to Advance through DataLoader. For additional information, please refer to the *Advance Web Encompass Connector Reference*.

iModules Encompass Gift refinements

A new user interface has been introduced to Advance Web's Encompass Connector application for gift mapping and gift profiles. In addition, existing functionality for manually and auto-scheduling requests has been enhanced to allow gifts to be pulled from Encompass on their own accord. This new functionality allows for more flexibility and transparency with these transactions. Additionally, Advance Web can now recognize an appeal code associated with an Encompass campaign and map it to the pulled gift's entry in Gift Batch. Previously, one-time gifts were pulled whenever a bio-demographic pull was requested.

Listed below are the new components for setting up and pulling one-time gifts using Advance's Encompass Connector. For additional information on this and one-time gift processes, please refer to *Advance Web Encompass Connector Reference*.

Gift Data Mapping

- Baseline columns for member fields that you may decide to add to the Encompass Campaign form.
- Add a required column that corresponds to the campaign's donation amount field shown on Encompass' Campaign form.
- Add optional columns that correspond to fields that may be on the Encompass' Campaign form, such as Joint Donor Name.

Gift Profiles

- Create profiles for specific Encompass campaigns to automate or manually pull of one-time gift transactions.
- Copy the mapping entries to a new profile for a specific campaign or manually add elements to the profile.

Initiation

Manual Initiation

- Initiate manual gift pull requests

Scheduler

- Create automated pull schedules
- Send pull outcomes via email notification

Run History

- Display Run History for gift pull requests



System Options

Previously, numerous AWC system options controlled the behavior of Giving Options utilized by the Encompass Connector. Effective with Advance Web 9.8.1.0 these system options are available via the Advance system options table. The following chart indicates the system option mappings:

 **Note**

If you are upgrading to Advance Web 9.8.1.0 and you used Encompass iModules in a previous release, values in the AWC system options table will automatically be mapped to the new structure.

AWC System Option (Prior to 9.8.1.0)	Advance System Option (Effective with 9.8.1.0)	Description
26	350	Giving Options Appeal Code
27	351	Giving Options Campaign
28	352	Giving Options Credit Card Tender
33	353	Giving Options Gift Transaction Type
34	354	Giving Options Operator Name
37	355	Giving Options User Group
146	356	Associated Code for Multiple Allocation
155	357	Unauthenticated Operator Name
156	358	Unauthenticated User Group
184	359	Allocation Default

For additional information, please refer to the *Advance Web Encompass Connector Reference*, *Advance Web Encompass Data Mapping*, and *Advance System Options Reference* documents.

MLP and iModules Encompass compatibility

New support allows institutions to use iModules Encompass and MLP (Multi-Location Processing) simultaneously, in the same Advance environment.

Bio-Demographic Data - Push Location ID

Institutions using MLP can push bio-demographic data changes across all locations to Encompass. Once received by Encompass, the data changes are applied to the applicable sealed sub-community.

Bio-Demographic Data - Pull Group ID

Institutions using MLP can pull bio-demographic data changes from the sealed sub-communities in Encompass to Advance and the data will be associated with the applicable locations.

Gift Data - Pull Group ID

Institutions using MLP can pull one-time gift transactions from the sealed sub-communities in Encompass to Advance and the data will be associated with the applicable location's gift batches.

For additional information on using iModules Encompass, as well as setup information for using iModules Encompass and MLP concurrently, please refer to the *Advance Web Encompass Connector Reference*, *Advance Web Encompass Connector Administration and Installation Guide*, and the *Advance Web Encompass Data Mapping* spreadsheet.

For additional information on using MLP, please refer to the *Advance Web Multi-Location Processing Reference*.



Upgrade/Migration Tools

Log file analysis tool

A new database log file analysis tool simplifies the process of reviewing the Advance database log files after a database upgrade or installation is complete. This tool expedites the review process by generating a list that includes or excludes specified errors. This eliminates the need to manually review each log file individually.

After the database upgrade or installation is complete and the various log files are generated, the tool can be run in one of two modes. Both modes require the user to specify the types of errors they want to include and exclude. The modes are:

- **Graphical User-Interface** – When you run the tool in GUI mode, you use a GUI interface to specify the directory where the various log files are located. The tool identifies all errors in the directory that meet the inclusion/exclusion criteria, and then displays these errors in an easy-to-use GUI window.
- **Console** – When you run the tool in Console mode, you use the Command Prompt to navigate to the directory where the tool is located and execute the tool. You can specify the location where the log files are located, if it differs from the directory where the tool is stored. The tool identifies all errors in the directory that meet the inclusion/exclusion criteria, and writes them to a single text file. You can use any text editor to review the results.

Note

Use of this tool is not required. You may continue to review the log files one-by-one as in previous releases. Sample log files can be found in the Advance Database Installation Instructions.

For additional information, please refer to the *Administrator Utilities Reference*.

Site Help templates

Prior to Advance Web 9.8.1.0 there were three ways in which Site Help could be implemented in Advance Web:

- 1 The first technique is to use an application (such as Adobe® RoboHelp® <http://www.adobe.com/products/robohelp/>) to create a help system, which is external and independent of the Advance Web Online Help.
- 2 The second technique is to use RoboHelp to modify the source of the Ellucian-provided help system and generate a site-specific version.
- 3 The third technique is to edit or replace the standard out-of-the-box help system with your site-specific help content using the Ellucian-provided Site Help Integration Utility.

While the first and third techniques have not changed in Advance Web 9.8.1.0, the second technique was improved and in addition to containing baseline online help content, the baseline Advance Web Online Help in 9.8.1.0 contains a series of templates, which can be helpful for creating site-specific content. Regardless of whether you use the templates or simply use the source to modify it to fit your policies and procedures, using the default online help system as a starting point allows you to speed up the process of installing site help and get the information into the hands of your end-users. By default these templates are disabled.

In order to modify the default online help and enable the templates, you need both the source files for the Advance Web Online Help and RoboHelp. The Advance Web Online Help source can be downloaded from the Download Center. Adobe RoboHelp is not provided by Ellucian and must be procured and licensed separately. If you use this technique to modify and generate a new version of the online help, you must re-distribute a new version of the help file when you upgrade to a new release of Advance Web. You may also need to modify the online help metadata if your help system utilizes context-sensitive help.



Note

Training and configuration assistance is available through Ellucian's Professional Services team.

For additional information on enabling the templates or modifying the metadata to utilize context-sensitive help, please refer to the *Advance Web Site Help Integration Utility User Guide*.

Attachment migration utility

The Attachment Migration Utility converts attachments to a format recognized by both Advance Windows and Advance Web. Use of this utility is only required when documents entered through Advance Windows are not viewable in Advance Web.

When you run the utility, the following file types are converted to a format recognized by Advance Web. File types not listed below are not affected and do not need to be converted. The conversion involves removing OLE header and footer data from the attachments in order to ensure proper maintenance in Advance Web:

- DOC and DOCX
- XLS and XLSX
- PPT and PPTX
- PDF

Regardless of which version of MS Word, Excel or PowerPoint was used to create the files you are migrating, you must have the 2007 or 2010 version of each of these products installed on the machine running this utility.

When to run the utility

This utility should be run based on the recommendations below. If you are in a hybrid environment using Advance Web and Advance Windows, Ellucian recommends you refrain from continuing to attach documents using Advance Windows after you have run the utility. As needed, the utility can be run more than once and whenever appropriate. If you have any questions about when to run the utility, please contact customersupport@ellucian.com.

LEAP Clients

- Run once during the LEAP process to convert existing documents from Advance Windows to Advance Web. There should be no need to run the utility again.

Hybrid Clients

- Run once to convert existing documents from Advance Windows to Advance Web.
- Run as needed after the initial conversion if documents are attached via Advance Windows and are not viewable in Advance Web. If you do not add attachments to Advance Windows after the initial migration is complete, you do not need to run the attachment after the initial migration.

For additional information on when and how to run this utility, please refer to the *Administrator Utilities Reference*.



Support

The following non-Elucian platforms and operating environments were tested against, and are supported for use with, Advance Web 9.8.1.0.

Browsers

- Microsoft Internet Explorer®8
- Microsoft Internet Explorer 9
- Mozilla Firefox 12.0
- Safari 5.1 (Mac, iPad, Windows)
- Google Chrome 19.0

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 (11.2.0.3.0)

Oracle Database Access Components (ODAC)

- 11.2 Release 4 (11.2.0.3.0) for Windows
- 11.2 Release 4 (11.2.0.3.0) for Windows x64



XCOPY installations must use EZCONNECT vs. tnsname.ora for server names.

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

Mobile devices

- Blackberry Curve 8900 Series
- iPad



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

Online help

- Adobe® RoboHelp® 9.0.0.228

Application development

- Microsoft® Visual Studio® 2010 SP1 (for Advance Web)
- Sybase® PowerBuilder Enterprise 12.1, Build 7000 (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)
- Cygwin 1.7.9-1
- Microsoft Office 2003, 2007, 2010
- Microsoft Exchange 2007 and 2010
- Freedom Scientific JAWS® 10.0.1178 (32-bit)
- 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 and 2008 R2
- SunGard Bi-Tech IFAS 7.9 w/Patch
- SunGard EXP MACESS 3.4 SP4
- 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)
- Hosted Checkout Page and PayPal PayFlow Link
- CyberSource Hosted Order Page



Compatibility

The following Ellucian applications were tested with, and are compatible with, Advance Web 9.8.1.0.

Advance Windows

- Version 9.8.1.0

Advance Web Community (AWC)

- Version 4.2.0



Note

The use of Encompass and AWC concurrently is not supported.

Advance Configuration Utility

- Version 9.8.1.0 (in 32-bit mode on 32-bit and 64-bit hardware)

Events

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

SmartCall / Advance Synchronization

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

SmartCall Integration Utility (SIU)

- Version 3.8 (for SmartCall 9.6.0 and 9.7.0)

Pledge Integration Utility (PIU)

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

Data Movement

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

Site Help Integration Utility

- Version 3.0

Advance Loader (AdvLoader)

- Version 9.8.1.0

Advance Export (AdvExport)

- Version 9.8.1.0

Job Scheduler

- Version 3.1

Banner Student

- Version 8.5.3



System-wide Changes

Database tables and indexes

This section lists all database changes in Advance 9.8.1.0.

Table changes

This section lists all table changes in Advance 9.8.1.0.



Note

This section lists table 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.

adv_load_pledge_base

(increased size)

- appeal_code from varchar2(5) to varchar2(15)

appeal_header

(increased size)

- appeal_code from varchar2(5) to varchar2(15)

appeals

(increased size)

- appeal_code from varchar2(5) to varchar2(15)

awc_gift_transaction (increased size)
• appeal from varchar2(5) to varchar2(15)

awc_loader_marital_info (increased size)
• spouse_name from varchar2(40) to varchar2(60)
• old_spouse_name from varchar2(40) to varchar2(60)

awc_memb_transaction (increased size)
• memb_appeal_code from varchar2(5) to varchar2(15)

batch_control (increased size)
• bc_appeal from varchar2(5) to varchar2(15)

batch_matching_gift_entry (increased size)
• appeal_code from varchar2(5) to varchar2(15)

bg_associated_donor (increased size)
• bg_appeal from varchar2(5) to varchar2(15)

bpe_associated_donor (increased size)
• bpe_asc_appeal from varchar2(5) to varchar2(15)

context (increased size)
• appeal_code from varchar2(5) to varchar2(15)

data_transfer_allocate_archive (new table)

• allocate_archive_id	number(19,0)	not null
• transaction_id	number(19,0)	not null
• instance_id	varchar2(50)	not null
• payment_transaction_number	number(10,0)	not null
• thirdpty_designation_id	number(10,0)	null
• instance_element_name	varchar2(100)	null
• thirdpty_column_name	varchar2(100)	not null
• thirdpty_column_value	varchar2(2000)	null
• concurrency_version	number(19,0)	not null
• data_origin	varchar2(30)	not null
• date_modified	date	not null
• operator_name	varchar2(32)	not null
• location_id	number	null



data_transfer_allocate_detail (new table)

- allocate_detail_id number(19,0) not null
- transaction_id number(19,0) not null
- instance_id varchar2(50) not null
- payment_transaction_number number(10,0) not null
- thirdpty_designation_id number(10,0) null
- instance_element_name varchar2(100) null
- thirdpty_column_name varchar2(100) not null
- thirdpty_column_value varchar2(2000) null
- concurrency_version number(19,0) not null
- data_origin varchar2(30) not null
- date_modified date not null
- operator_name varchar2(32) not null
- location_id number null

data_transfer_category (new column)

- date_modified_overrde varchar2(2000) not null

data_transfer_member_archive (new table)

- member_archive_id number(19,0) not null
- transaction_id number(19,0) not null
- instance_id varchar2(50) not null
- thirdpty_column_name varchar2(100) not null
- thirdpty_column_value varchar2(2000) null
- id_number number(10,0) null
- group_id number null
- concurrency_version number(19,0) not null
- data_origin varchar2(30) not null
- date_modified date not null
- operator_name varchar2(32) not null
- location_id number null

data_transfer_member_detail (new table)

- member_detail_id number(19,0) not null
- transaction_id number(19,0) not null
- instance_id varchar2(50) not null
- thirdpty_column_name varchar2(100) not null
- thirdpty_column_value varchar2(2000) null
- id_number number(10,0) null
- group_id number null

- concurrency_version number(19,0) not null
- data_origin varchar2(30) not null
- date_modified date not null
- operator_name varchar2(32) not null
- location_id number null

data_transfer_payment_archive (new table)

- payment_archive_id number(19,0) not null
- transaction_id number(19,0) not null
- instance_id varchar2(50) not null
- payment_transaction_number number(10,0) not null
- thirdpty_column_name varchar2(100) not null
- thirdpty_column_value varchar2(2000) null
- concurrency_version number(19,0) not null
- data_origin varchar2(30) not null
- date_modified date not null
- operator_name varchar2(32) not null
- location_id number null

data_transfer_payment_detail (new table)

- payment_detail_id number(19,0) not null
- transaction_id number(19,0) not null
- instance_id varchar2(50) not null
- payment_transaction_number number(10,0) not null
- thirdpty_column_name varchar2(100) not null
- thirdpty_column_value varchar2(2000) null
- concurrency_version number(19,0) not null
- data_origin varchar2(30) not null
- date_modified date not null
- operator_name varchar2(32) not null
- location_id number null

data_transfer_profile_map (new columns)

- local_transform_id integer not null
- profile_sub_type varchar2(5) not null
- thirdpty_control_id number(5) null

data_transfer_profiles (new columns)

- profile_sub_type varchar2(5) not null
- thirdpty_control_id number(5) null



• local_control_value	varchar2(15)	not null
document_batch_detail	(increased size)	
• appeal_code	from varchar2(5) to varchar2(15)	
dues_payment	(increased size)	
• memb_appeal_code	from varchar2(5) to varchar2(15)	
dues_payment_rev	(increased size)	
• memb_appeal_code	from varchar2(5) to varchar2(15)	
employment	(new columns)	
• emp_attribute_1_code	varchar2(5)	not null
• emp_attribute_2_code	varchar2(5)	not null
• emp_attribute_3_code	varchar2(5)	not null
• emp_attribute_4_code	varchar2(5)	not null
• emp_attribute_5_code	varchar2(5)	not null
entity	(increased size)	
• spouse_name	from varchar2(40) to varchar2(60)	
	(new column)	
• group_id	number	null
former_spouse	(increased size)	
• spouse_name	from varchar2(40) to varchar2(60)	
gift	(increased size)	
• gift_appeal	from varchar2(5) to varchar2(15)	
gift_aid_eligible	(new table)	
• id_number	varchar2(10)	not null
• xsequence	number(6,0)	not null
• eligible_status_code	varchar2(5)	not null
• eligible_ind	char(1)	not null
• start_date	date	null
• stop_date	date	null
• xcomment	varchar2(255)	not null
• date_added	date	not null
• date_modified	date	not null
• operator_name	varchar2(32)	not null
• user_group	varchar2(2)	not null
• data_source_code	varchar2(3)	not null

memb_batch_control**(increased size)**

- memb_appeal_code from varchar2(5) to varchar2(15)
(new column)
- recurring_pmt_type varchar2(2) null

memb_batch_eft_base**(new table)**

- memb_batch_number varchar2(10) not null
- memb_number varchar2(10) not null
- bank_number varchar2(20) not null
- eft_type char(1) not null
- eft_amt number(14,2) not null
- bank_transaction_code varchar2(10) not null
- account_number varchar2(30) not null
- expiration_month varchar2(2) not null
- expiration_year varchar2(4) not null
- credit_card_type varchar2(2) not null
- bank_name varchar2(60) not null
- account_type char(1) not null
- name_on_account varchar2(60) not null
- prenote_date date null
- date_added date not null
- date_modified date not null
- operator_name varchar2(32) not null
- user_group varchar2(2) not null
- location_id number null

memb_batch_entry**(increased size)**

- memb_appeal_code from varchar2(5) to varchar2(15)
(new column)
- recurring_pmt_type varchar2(2) null

memb_batch_payment**(increased size)**

- memb_appeal_code from varchar2(5) to varchar2(15)

memb_eft_base**(new table)**

- memb_number varchar2(10) not null
- bank_number varchar2(20) not null
- eft_type char(1) not null
- eft_amt number(14,2) not null
- bank_transaction_code varchar2(10) not null
- account_number varchar2(30) not null

- expiration_month varchar2(2) not null
- expiration_year varchar2(4) not null
- credit_card_type varchar2(2) not null
- bank_name varchar2(60) not null
- account_type char(1) not null
- name_on_account varchar2(60) not null
- prenote_date date null
- date_added date not null
- date_modified date not null
- operator_name varchar2(32) not null
- user_group varchar2(2) not null
- location_id number null

memb_recur_pymts_log (new table)

- memb_number varchar2(10) not null
- payment_number varchar2(10) not null
- pay_date date null
- reminder_date date null
- reminder_type char(1) not null
- reminder_code varchar2(4) not null
- date_added date not null
- date_modified date not null
- operator_name varchar2(32) not null
- user_group varchar2(2) not null
- location_id number null

memb_rev (increased size)

- memb_appeal_code from varchar2(5) to varchar2(15)
(new column)
- recurring_pmt_type varchar2(2) null

memb_reversal_eft_base (new table)

- memb_number varchar2(10) not null
- occurrence number(6,0) not null
- bank_number varchar2(20) not null
- eft_type char(1) not null
- eft_amt number(14,2) not null
- bank_transaction_code varchar2(10) not null
- account_number varchar2(30) not null
- expiration_month varchar2(2) not null



- expiration_year varchar2(4) not null
- credit_card_type varchar2(2) not null
- bank_name varchar2(60) not null
- account_type char(1) not null
- name_on_account varchar2(60) not null
- prenote_date date null
- date_added date not null
- date_modified date not null
- operator_name varchar2(32) not null
- user_group varchar2(2) not null
- location_id number null

past_document_batch_detail (increased size)

- appeal_code from varchar2(5) to varchar2(15)

pledge (increased size)

- pledge_appeal from varchar2(5) to varchar2(15)

pledge_rev (increased size)

- pledge_appeal from varchar2(5) to varchar2(15)

sport (new column)

- data_source_code varchar2(3) not null

vol_activity (new column)

- xcomment varchar2(255) not null

yy_cfae_gi_income_rpt (new columns)

- board_member_soft_dnr number(10,0) not null
- board_member_soft_amt number(14,2) not null
- intercollegiate_cap_amt_face number(14,2) not null
- intercollegiate_cap_f_nbr number(10,0) not null

yy_dp_payments (increased size)

- pay_appeal_code from varchar2(5) to varchar2(15)
- pay_appeal_desc from varchar2(40) to varchar2(60)

yy_dp_transactions (increased size)

- memb_appeal_code from varchar2(5) to varchar2(15)
- memb_appeal_desc from varchar2(40) to varchar2(60)

yy_gp_codes	(increased size)
• appeal_code1	from varchar2(6) to varchar2(15)
• appeal_desc1	from varchar2(40) to varchar2(60)
• appeal_code2	from varchar2(6) to varchar2(15)
• appeal_desc2	from varchar2(40) to varchar2(60)

yy_gp_gifts	(increased size)
• bg_appeal_code	from varchar2(5) to varchar2(15)
• bg_appeal_description	from varchar2(40) to varchar2(60)

	(new columns)
• auth_trans_num	varchar2(26) not null
• card_auth_code	varchar2(200) not null,
• auth_date_time	date null
• card_auth_source	varchar2(5) not null
• misc_detail1	varchar2(120) not null
• misc_detail2	varchar2(120) not null
• misc_date1	date null
• misc_float1	number not null

yy_memb_renewals	(increased size)
• memb_appeal_code	from varchar2(5) to varchar2(15)
• memb_appeal_desc	from varchar2(40) to varchar2(60)

yy_reminder_codes	(increased size)
• appeal_code1	from varchar2(6) to varchar2(15)
• appeal_desc1	from varchar2(40) to varchar2(60)
• appeal_code2	from varchar2(6) to varchar2(15)
• appeal_desc2	from varchar2(40) to varchar2(60)

zz_export_header	(increased size)
• appeal_code	from varchar2(5) to varchar2(15)

zz_gpl_bg_associated_donor	(increased size)
• bg_appeal	from varchar2(5) to varchar2(15)

zz_gpl_bpe_associated_donor	(increased size)
• bpe_asc_appeal	from varchar2(5) to varchar2(15)

zz_gpl_transaction	(increased size)
• appeal_code	from varchar2(5) to varchar2(15)



- zz_gpl_transaction_archive** (increased size)
- appeal_code from varchar2(5) to varchar2(15)

zz_last_viewed (obsolete table)

zz_location (new columns)

- group_id number null
- xcomment varchar2(255) not null

zz_user_history (new table)

- user_history_id number not null
- user_name varchar2(32) not null
- time_stamp date not null
- history_type varchar2(16) not null
- id_type varchar2(16) null
- id_value varchar2(100) null
- location_id number null

zz_user_mu_last_used (new table)

- user_name varchar2(30) not null
- list_type varchar2(5) not null
- transform_id number not null
- date_added date not null
- date_modified date not null

New Indexes

This section lists all new indexes in Advance 9.8.1.0.

Index Name	Table	Columns
address_geo_key_enc	address_geo	id_number date_modified
affiliation_key_enc	affiliation	id_number date_modified
batch_matching_gift_entry_key4	batch_matching_gift_entry	bm_receipt_number bm_donor_id bm_check_number bm_type

Index Name	Table	Columns
bpe_associated_donor_key1	bpe_associated_donor	bpe_asc_donor_id
children_key_enc	children	id_number date_modified
committee_key_enc	committee	id_number date_modified
data_transfer_allocate_key0	data_transfer_allocate_detail	transaction_id instance_id payment_transaction_number thirdpty_designation_id thirdpty_column_name
data_transfer_member_det_key0	data_transfer_member_detail	transaction_id instance_id thirdpty_column_name
data_transfer_payment_det_key0	data_transfer_payment_detail	transaction_id instance_id payment_transaction_number thirdpty_column_name
econtact_key_enc	econtact	id_number date_modified
funding_purpose_key1	funding_purpose	parent_funding_purpose_code
gift_aid_eligible_key0	gift_aid_eligible	id_number xsequence
gift_clubs_key_enc	gift_clubs	gift_club_id_number date_modified
ids_base_key_enc	ids_base	id_number date_modified
memb_batch_eft_base_key0	memb_batch_eft_base	memb_batch_number memb_number
memb_eft_base_key0	memb_eft_base	memb_number
memb_recur_pymts_log_key1	memb_recur_pymts_log	memb_number



Index Name	Table	Columns
memb_reversal_eft_base_key0	memb_reversal_eft_base	memb_number occurrence
relationship_key_enc	relationship	id_number date_modified
sport_key_enc	sport	id_number date_modified
zz_user_mu_last_used_key0	zz_user_mu_last_used	user_name list_type

Modified Indexes

This section lists all modified indexes in Advance 9.8.1.0.

Index Name	Table	New Columns
address_key4	address	id_number addr_pref_ind
committee_header_key0	committee_header	location_id
geo_code_key1	geo_code	location_id
geo_type_key1	geo_type	location_id
geo_zip_key1	geo_zip	location_id

TMS views

This section lists TMS view changes in Advance 9.8.1.0.

New TMS Views

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

View Name	Table Code	Description
tms_emp_attribute_1	D1	Codes that indicate additional attributes about the employment record.
tms_emp_attribute_2	D2	Codes that indicate additional attributes about the employment record.
tms_emp_attribute_3	D3	Codes that indicate additional attributes about the employment record.
tms_emp_attribute_4	D4	Codes that indicate additional attributes about the employment record.
tms_emp_attribute_5	D5	Codes that indicate additional attributes about the employment record.
tms_gift_aid_eligible_status	GG	Codes that indicate the gift aid eligible statuses. Values in this view can be selected from the Status drop-down on the Gift Aid Eligible form.
tms_memb_recur_acct_type	ML	Codes that indicate bank account types for recurring payment types for memberships.
tms_memb_recurring_pmt_type	MK	Codes that indicate recurring payment types for memberships.
tms_profile_sub_type	B3	Codes that indicate iModules Encompass Profile sub-types.

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_country	AE	Renamed column from Foreign Phone to Non-US Phone Format
tms_data_source	YI	New required value: IM - iModules Encompass
tms_econtact_source	EG	New required value: IM - iModules Encompass
tms_email_type	WI	New column: Online Community – Alternate Email Type
tms_ids_type	H6	New column: Online Community - Alternate ID
tms_memb_pay_type	MD	New column: Recurring Dues Payment
tms_name_type	BJ	New columns: Online Community – Alternate Name Online Community – Maiden Name Online Community – Nickname
tms_record_type	AC	New column: Address Type Default
tms_task_assign_type	TM	New column: Use with CR & Task Combo Form
tms_task_status	TL	New column: CR Task Combo

System options

This section contains information regarding system options changes in Advance 9.8.1.0. For a complete list of system options and full descriptions, please refer to the *Advance System Options Reference* or Configuration Utility Online Help.

New Advance System Options

The following system options (zz_adv_sysoptions) are new in Advance 9.8.1.0.

System Option	Title	Default Value
330	EFT - Recurring Membership Payments to Process	blank
331	EFT - Recurring Membership Payments Tender Type	blank
332	EFT - Recurring Membership Default Usergroup	blank
333	EFT - Recurring Membership Batch Transaction Maximum	25
350	Giving Options Appeal Code	blank
351	Giving Options Campaign	blank
352	Giving Options Credit Card Tender	blank
353	Giving Options Gift Transaction Type	blank
354	Giving Options Operator Name	blank
355	Giving Options User Group	blank
356	Associated Code for Multiple Allocation	blank
357	Unauthenticated Operator Name	blank
358	Unauthenticated User Group	blank
359	Allocation Default	blank

Note

System options 350-359 were previously located in the AWC System Options table. If you are upgrading to Advance Web 9.8.1.0 and you used Encompass iModules in a previous release, values in the AWC system options table will automatically be mapped to the new structure.

Defect Fixes

For a comprehensive and detailed list of defects resolved in this release, please refer to the supplemental problem resolutions file (Advance_Web_9_8_1_0_Resolutions.txt). The information in this text file is extracted directly from the Customer Support Center just prior to release of the product.





Known Issues

The following table contains a brief description of known issues in Advance Web 9.8.1.0. For additional information on any of these issues, please contact customersupport@ellucian.com.

Synopsis: Crystal Reports 11.5 graphics are not displaying in Firefox 12. **Description:** If you use Firefox 12 to view a report created with Crystal Reports 11.5, the Crystal Report graphics at the top of the report do not display. This occurs because the Crystal Reports code is not rendering HTML for toolbars in Firefox 12.

