

# **BANNER FINANCIAL AID SELF-SERVICE RELEASE GUIDE**

Release 8.12  
August 2011



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# Banner Financial Aid Self-Service 8.12 Release Guide

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# Introduction

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This guide documents the Banner® Financial Aid Self-Service 8.12 release, which includes release related changes and problem resolutions. This document provides detailed information about the Banner Financial Aid Self-Service 8.12 release only.

This document describes the functional and technical aspects of necessary changes made to support field and column expansion for Budgets and Resources in the Banner Financial Aid 8.12 release.

## Problem Resolutions

Problem resolutions are summarized by object at the end of the release guide. For more information about a problem resolution, refer to the `faidss81200resolutions.txt` file that accompanies the Banner Financial Aid Self-Service 8.12 release.

Please refer to the *Banner Financial Aid 8.12 Release Guide* for more comprehensive information about this enhancement.



# 1 Field and Column Expansion for Budgets and Resources - Functional

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The Banner Financial Aid Self-Service 8.12 release supports the necessary changes made to allow the maximum value of budget components and resources to display properly. An individual budget component may have a value up to \$999,999,999.99. Because the total of all the budget components may exceed a value of \$999,999,999.99, the total budget used throughout Banner Financial Aid processing will be capped at \$999,999,999.99. When displaying the sum when individual components are listed such as the total amount on the Cost of Attendance page, the actual total will display but will be capped at a maximum of \$999,999,999,999.99. When only the total of the applicant's budget is displayed such as Cost of Attendance on the Financial Aid Status page, the capped total of \$999,999,999.99 will display when the total of the components exceed \$999,999,999.99.

Resources in Financial Aid, whether they are Contracts, Exemptions, or Other, also may have an individual values of \$999,999,999.99 with a resulting sum exceeding that value. When the individual resources are listed with the total, the actual amount will display but will be capped at a maximum of \$999,999,999,999.99. When only the calculated total of the resources are displayed, the maximum value used in Financial Aid processing of \$999,999,999.99 will be displayed.

Additional changes were made to replace using views to display budget and resource information with packages.

# Changed Web Pages

The following Web pages have been modified to support the 8.12 release.

## Cost of Attendance

### Financial Aid Tab

Functionality used to return data that includes each budget component description and amount has been removed and replaced with a new procedure to properly display budget components.

- **Budget Component Amount** - Allows individual component amounts to a maximum value of \$999,999,999.99.
- **Total Amount** - Will display the actual sum of the budget components up to a maximum value of 999,999,999,999.99.

The screenshot shows the 'Cost of Attendance for 2011-2012 aid year' page. The page includes a navigation bar with 'Personal Information', 'Student', and 'Financial Aid' tabs. A search bar is located in the top right corner. The main content area displays a table titled 'Budget Detail' with the following data:

Budget Component	Amount
Books and Supplies	\$35,000.00
Personal Expenses	\$250,000,000.00
Room and Board	\$100,150,000.00
Tuition and Fees	\$999,999,999.00
Transportation	\$113,000.00
<b>Total:</b>	<b>\$1,350,297,999.00</b>

Below the table, there is a link 'Select Another Aid Year' and a button 'Overall Financial Aid Status'. The page footer includes 'RELEASE: 8.12' and 'SITE MAP'.

# Award Package

## Award Overview Tab

Functionality used to return data that includes each budget component description and amount has been removed and replaced with a new procedure to properly display budget components.

- **Budget Component Amount** - Allows individual component amounts to a maximum value of \$999,999,999.99.
- **Total Amount** - Will display the actual sum of the budget components up to a maximum value of 999,999,999,999.99.

Additional changes were made in the logic to display the Cost of Attendance detail when the option has been selected for the aid year on the Web Processing Rules tab of ROAINST.

- If there are both a non-Pell and a pell budget, the Pell budget is ignored. The info access indicator of the non-Pell will control if the COA displays or not.
- If there is only the Pell budget, then it controls the displays of the COA. If no budget exists, nothing is displayed

Changes were also made to the logic for display data under Need Calculation when that option has been selected for the aid year on the Web Processing Rules on ROAINST.

- The hierarchy for which budget to display is the non-pell budget first and if one does not exists, the Pell budget will be displayed. If no budget exists, the EFC will still be displayed.

The screenshot shows a web application interface for 'Award Package for 2011-2012 aid year'. It includes navigation tabs like 'General Information', 'Award Overview', 'Resources/Additional Information', 'Terms and Conditions', 'Accept Award Offer', and 'Special Messages'. Below the tabs, there are two tables: 'Need Calculation' and 'Cost of Attendance'. The 'Need Calculation' table lists components like 'Cost of Attendance', 'Estimated Family Contribution', 'Initial Need', 'Outside Resource', and 'Need'. The 'Cost of Attendance' table lists components like 'Books and Supplies', 'Personal Expenses', 'Room and Board', 'Tuition and Fees', 'Transportation', and a 'Total' row. A 'Status' section below shows 'Unknown'.

Need Calculation		Cost of Attendance	
Component	Amount	Component	Amount
Cost of Attendance	\$999,999,999.99	Books and Supplies	\$35,000.00
Estimated Family Contribution	\$711.00	Personal Expenses	\$250,000,000.00
Initial Need	\$999,999,288.99	Room and Board	\$100,150,000.00
Outside Resource	\$999,999,999.99	Tuition and Fees	\$999,999,999.00
Need	\$ 0.00	Transportation	\$113,000.00
		<b>Total:</b>	\$1,350,297,999.00

### Note

Individual budget component amounts allow a maximum numeric value of 999,999,999.99. The Total of the components will display the actual sum of the components, up to a numeric value of 999,999,999,999.99.

# Award Package

## Resources/Additional Information Tab

Functionality used to return data that includes each budget component description and amount has been removed and replaced with a new procedure to properly display budget components.

- **Additional Resource Term** (Expected/Actual Amount)
- **Total** (Expected/Actual Amount)
- **Calculated Resource Total**

The screenshot shows the Banner Financial Aid Self-Service interface. At the top, there are navigation links for Personal Information, Student, and Financial Aid. A search bar is located on the right. The main heading is "Award Package for 2011-2012 aid year". Below this, there is a breadcrumb trail: Home > Financial Aid > Financial Aid Award Information Menu > Award for Aid Year. On the right side, there is a user ID and date: 811110401 Adam Laird401 JUL 21, 2011 14:41. The interface has several tabs: General Information, Award Overview, Resources/Additional Information (which is selected), Terms and Conditions, Accept Award Offer, and Special Messages. Under the Resources/Additional Information tab, there is a section titled "Resources" containing a table with the following data:

Additional Resource	Term	Expected Amount	Actual Amount
Emblem Club Scholarship	Spring 2011-2012 (Finaid use)	\$350,000.00	\$350,000.00
Daughters' of Foreign Wars Scholarship	Fall 1112 (Finaid term)	\$999,999,999.00	\$999,999,999.00
<b>Total</b>		<b>\$1,000,349,999.00</b>	<b>\$1,000,349,999.00</b>

Below the table, it says "Calculated Resource Total \$1,000,349,999.00". There is a message box with a yellow icon that says: "If you have questions regarding any differences between the above total amounts and your calculated total, please contact the Financial Aid office." Below this is the "Additional Information" section, which contains a message box with a yellow icon that says: "Please answer the questions displayed below. Also, if you have additional outside resources that are not reflected above, please inform the financial aid office by entering the information below. Once all answers and additional resource information are entered, please press Submit to send this information to the Financial Aid Office." At the bottom of the page, there is a "No stops processing" label and a dropdown menu set to "None".

The total for the Expected Amount and Actual Amount will be the sum of all the resources and will be capped at a maximum numeric value of 999,999,999,999.99.

# 2 Field and Column Expansion for Budgets and Resources - Technical

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This technical section discusses the Web page changes made to supports the necessary changes made to allow the maximum value of budget components and resources to display properly in the Banner Financial Aid Self-Service 8.12 release.

## Changed Packages

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### BWRKBUDG Package

Functionality used to return data that includes each budget component description and amount has been removed and replaced with a new procedure to properly display budget components.

As a result of this change, the **Budget Component Amount** item is capped at 999,999,999.99 and can display a numeric value up to and including 999,999,999.99. The **Total Amount** item displays the actual sum of the budget components and is capped at \$999,999,999,999.99.

### BWRKRHST Package

#### F\_ShowResource

The following have been modified to be of TOTAL\_AMOUNT\_TYPE:

- total\_est\_amt
- total\_actual\_amt

This function has been modified to display the LEAST of M\_RESOURCE\_MAX or:

- total\_est\_amt
- total\_actual\_amt

## P\_ShowCOA

Functionality used to return data that includes each budget component description and amount has been removed and replaced with a new procedure to properly display budget components.

- **Budget Component Amount** - Allows individual component amounts to a maximum value of \$999,999,999.99.
- **Total Amount** - Will display the actual sum of the budget components up to a maximum value of 999,999,999,999.99.

## BWRKSUMM Package

### P\_Dispsumm

Functionality used to return data that includes each budget component description and amount has been removed and replaced with a new procedure to properly display budget components.

As a result of this change, the **Budget Component Amount** item is capped at 999,999,999.99 and can display a numeric value up to and including 999,999,999.99. The **Total Amount** item displays the actual sum of the budget components and is not capped at \$999,999,999,999.99.

# 3 Miscellaneous Enhancements - Functional

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This section describes enhanced Banner Financial Aid Self-Service functionality that includes information about the new Web Snapshot System.

## Web Snapshot System

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### Overview

The Banner Financial Aid Self-Service 8.12 release supports a new feature designed to allow non-Banner users to access Banner data via the standard Self-Service web interface. The new Web Snapshot system was designed and developed by Western Governors University and provided to Banner customers through the Community Source Initiative.

The Web Snapshot system is a Self-Service web tool for Financial Aid Advisors and other customer facing staff to use to easily and quickly retrieve current data (a “Snapshot”) from the Banner system for a particular student. Each user can configure multiple custom Snapshot layouts for viewing retrieved data, and system administrators can easily build new web “panes” to extract custom data to suit their users’ specific needs. Users can view student info on a one-off basis or step through a pre-built population of students, which can be useful for call center operations.

## Web Snapshot System Configuration

### Adding the Web Snapshot System to a Menu

The Web Snapshot system must be added to a WebTailor menu so that users can navigate to it. Identify where you would like to add a link to the Web Snapshot system and then have your WebTailor administrator add the following menu item to the corresponding menu:

- `bwrksnap.p_disp_fasnap`

## Managing Access to the Web Snapshot System

Two distinctly different levels of access can be assigned to users of the Web Snapshot system:

- Financial Aid Staff
  - This access level allows a user to create custom Web Snapshot layouts and view data for any defined Snapshot Pane for any ID entered.

### Note

The user can enter and view data associated with any ID in the system. There is no built-in security restricting user access to certain IDs. ■

- Financial Aid Admin
  - This access level allows a user to create custom Snapshot Panes, which are defined by entering an SQL query which is executed when a user views the Snapshot Pane on their Web Snapshot layout.

### Note

The Web Snapshot Administrator can enter SQL that accesses any table in the database. Administrator access should be carefully controlled by the institution. ■

Web Tailor Administrator credentials are required to grant either level of access to individual users.

## WebTailor Administration

### Adding a New Item to an Existing Menu

Identify the menu to which you wish to add the new item. Baseline Banner menus typically begin with the name “bmenu”.

1. Navigate to the menu where you want to add the new item.
  - Take note of the URL listed in your browser’s address line.

### Tip

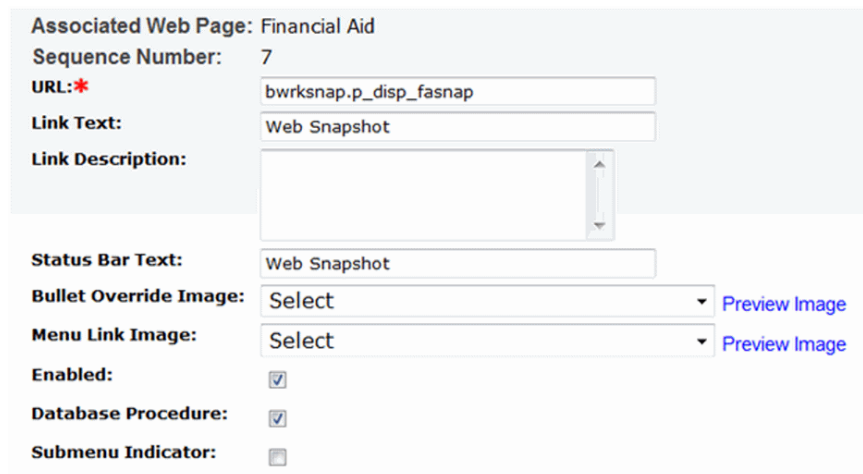
The menu name is usually the text between the right-most forward slash and the question mark (?) or the end of the line. ■

- Next, navigate to the main WebTailor Administration menu.
  - Click the **Menu Items** link.
  - Search for the menu you want to modify, and then click the link to customize the menu.
  - Click the **Add a New Menu Item** button.

 **Tip**

If the menu chosen contains only Baseline entries, you will first need to click the **Copy Baseline to Local** button before adding a new menu item.

- The Create a new Menu Item page will be displayed.
- From the **Create a New Menu Item** page, enter the URL for the web page you wish to add (`bwrksnap.p_disp_fasnap`).
    - Enter a link text along with an optional “additional description” to display with the link.
    - Select (check) the **Database Procedure** checkbox.
  - Once complete, your settings for the menu item should be similar to the following screen sample:



Associated Web Page: Financial Aid

Sequence Number: 7

URL: \*

Link Text:

Link Description:

Status Bar Text:

Bullet Override Image:  [Preview Image](#)

Menu Link Image:  [Preview Image](#)

Enabled:

Database Procedure:

Submenu Indicator:

- Click **Submit Changes** to save this new menu item.

## Assigning WebTailor User Roles

1. Navigate to the WebTailor Administration main menu.
2. Click the **User Roles** link.
  - Enter the ID of the person you wish to assign access.
  - Click the **Submit** button.
3. Place a check next to each role you wish to assign to the user, as appropriate.
  - The Web Snapshot Administrator role is labeled **Financial Aid Snapshot Admin**.
  - The staff access role is labeled **Financial Aid Staff**.

## Using the Web Snapshot System

Users of the Web Snapshot system must first be granted access by a Self-Service WebTailor administrator. Refer to the *Managing Access to the Web Snapshot System* heading, above for specific details.

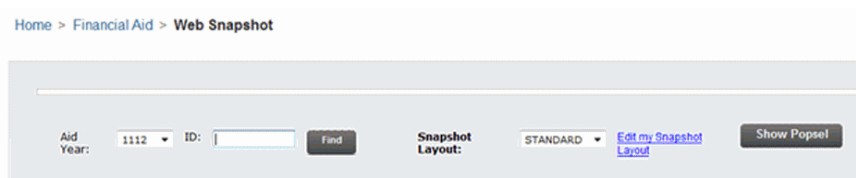
### Layout Maintenance

Users of the Web Snapshot system must first configure their own personal view, or “Snapshot Layout,” of the data.

Each user has a pre-defined Snapshot Pane Layout called STANDARD. The user can customize this view and/or create new views of the available Snapshot Panes to suit their needs.

### Modifying a Snapshot Layout

To modify a Snapshot Layout, first, select the layout from the main Web Snapshot page, then click the **Edit my Snapshot Layout** link:



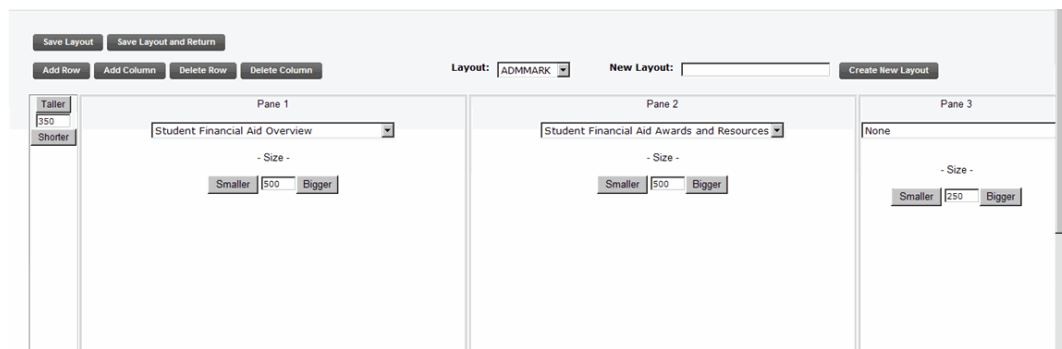
The screenshot shows a web interface with a breadcrumb trail: Home > Financial Aid > Web Snapshot. Below this is a search area with a dropdown menu for 'Aid Year' set to '1112', an 'ID:' input field, and a 'Find' button. To the right is a 'Snapshot Layout:' section with a dropdown menu set to 'STANDARD', a blue link for 'Edit my Snapshot Layout', and a 'Show Popsel' button.

Snapshot Layouts consist of a grid of cells, or Panes. Within each pane, a user can choose to display a set of data, or a Snapshot Pane. The user can also change the width of each pane and height of each row.

 **Note**

Financial Aid Snapshot Administrators can define additional custom Snapshot Panes for users to select for use in their Snapshot Layouts. ■

By default, each user has a Snapshot Layout named STANDARD. This layout begins with three columns and three rows, but no Snapshot Panes are selected for any of layout panes. To select a Snapshot Pane, use the drop-down box that appears with the pane, and select the Snapshot Pane you wish to display in that location. You may also adjust the width of the pane or the height of the row by clicking on the corresponding buttons.



Users can also add and delete columns and rows from their Snapshot Layout:

- The **Add Row** button will add a new row to the bottom of the current Snapshot Layout.
- The **Add Column** button will add a new column to the right of the existing columns of the current Snapshot Layout.
- The **Delete Row** button will delete the bottom-most row of the current Snapshot Layout.
- The **Delete Column** button will delete the right-most column of the current Snapshot Layout.

 **Note**

Panes set to “None” do not display anything when viewed from the main Web Snapshot page. It is acceptable to leave them in your Snapshot Layout. ■

## Creating a New Layout

Navigate to the Snapshot Layout Editor page by clicking the **Edit my Snapshot Layout** link on the main Web Snapshot page.

Type in a name for your new layout in the **New Layout** text box, then click the button labeled **Create New Layout**. A new layout is created with a default number of rows and columns. Edit the layout to your liking. Refer to the previous section titled *Modifying a Snapshot Layout* for details on how to edit your new personal Snapshot Layout.

## Save a Layout

Once you are done making changes to the layout:

- Click **Save Layout**:  
This will save your changes and allow you to continue making additional changes.

OR

- Click **Save Layout and Return**:  
This will save your changes and take you back to the main Web Snapshot home page.

## Single Student Snapshot

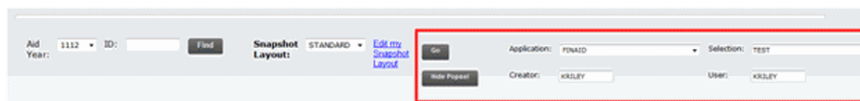
To view a Web Snapshot for a single student:

1. Navigate to the main Web Snapshot page.
2. Select the appropriate aid year for which you want to see data in your Web Snapshot.
3. Enter the student's ID in the ID field.
4. Click the **Find** button.

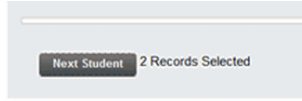
## Using a Population Selection

To iteratively view Web Snapshots for each student in a list, use the Population Selection feature.

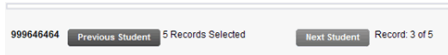
1. Click the **Show Popsel** button to display the population selection parameters block, as shown here:



2. Enter the appropriate values for each of the 4 population selection fields. Values correspond to the key block values from the Banner GLAEXTR form.
3. Once all the values are entered, click the **Go** button. The number of records found in the population selection will be displayed. If that number is greater than zero, a button labeled **Next Student** will also be displayed.



4. Click the **Next Student** button to generate the Web Snapshot for the first student in the population selection.
5. Navigation through the population selection can be done by using the **Previous Student** and **Next Student** buttons.



 **Note**

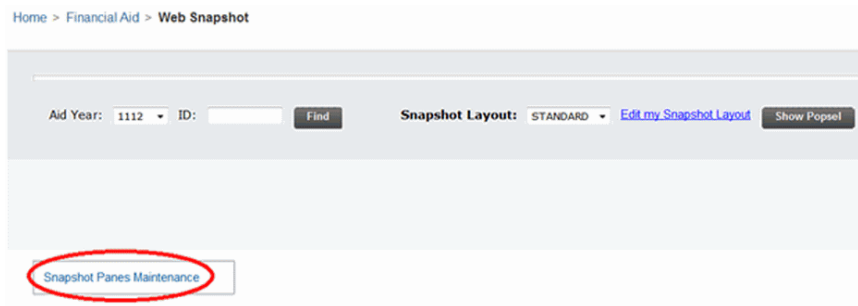
Records retrieved from the population selection are ordered by ID. ■

## Creating and Updating Web Snapshot Panes

Financial Aid Snapshot Administrators can create and modify Web Snapshot Panes. Banner delivers three Snapshot Panes as examples of the Web Snapshot system functionality.

Web Snapshot Panes are SQL statements which are executed when a Web Snapshot page is displayed, retrieving data from the Banner database and providing a simple layout of the data.

From the main Web Snapshot page, click the link at the bottom labeled **Snapshot Panes Maintenance** to create, modify, or delete Snapshot Panes.



## To create a new Snapshot Pane:

1. Click the **Create New Snapshot Pane** button.
2. Sequence:
  - Web Snapshot Panes can be composed of up to three separate queries. To create a multiple-query Web Snapshot Pane, enter duplicate Snapshot Pane codes with different Sequence numbers and queries. When rendered, the queries are executed separately but their results are concatenated into the same Pane on the main Web Snapshot page.
3. Enter a unique Snapshot Pane Code (up to 4 characters).
4. Enter a description for your new Snapshot Pane (up to 100 characters).
5. Enter a value for Columns:
  - If you want a standard spreadsheet-like layout for your Snapshot Pane data, set Columns to 0. This value will produce output with a single header row followed by data rows.
  - If you want a form-like presentation for your Snapshot Pane data, set Columns to the number of Name-Value pair columns in which you want your data to appear.
6. Enter your SELECT query in the SQL column. Requirements for the query are similar to Banner Form RORRULE advanced mode queries:

### *Query Requirements*

- Your query must be an SQL SELECT statement. INSERT/UPDATE/DELETE/ALTER/GRANT/etc. are not allowed.
- DO NOT end your query with a semi-colon (;).
- To specify the pidm for the ID being displayed on the main Web Snapshot page, use the value “:PIDM” (all upper or lower case)
- To specify the aid year code that is specified on the main Web Snapshot page, use the value “:AIDY” (all upper or lower case).
- Column aliases will be displayed as the report column headers on the main Web Snapshot page when data is retrieved. You can specify case-sensitive column aliases by placing your text after each column in the SELECT clause in double-quotes.

*Example:* SELECT rorstat\_tgrp\_code “Tracking Group Code”...

- SQL queries are limited to 32,767 characters.
- Calling PL/SQL functions is allowed if the functions have the PRAGMA RESTRICT\_REFERENCES WNDS specified.

7. Once done entering/updating a Snapshot Pane:

- Click the **Insert** button if the Snapshot Pane is new.
- Click the **Update** button if you have modified an existing Snapshot Pane

 **Note**

Upon Inserting/Updating a Snapshot Pane, the code will be executed to check for errors. If there are code errors, they will be displayed and you will need to correct them before re-entering your Snapshot Pane code. ■

 **Note**

Write and test your SQL in an Integrated Development Environment, such as TOAD or PL/SQL Developer, then copy the code into the Web Snapshot Pane Editor. ■

Home > Financial Aid > Web Snapshot > Snapshot Panes Maintenance

Create New Snapshot Pane		Snapshot Panes Setup		
	Seq	Snapshot Pane Code	Description	Columns SQL
<input type="button" value="Update"/>	1	AWRD	Student Financial Aid Awards and Resources	0 SELECT rfrbase_fund_title "Fund Title", rtvawst_desc "Status", TO_CHAR(rprawrd_offer_amt,\$999,990.00) "Offer Amount", rprawrd_offer_date "Offer Date", TO_CHAR(rprawrd_accept_amt,\$999,999.00) "Accept Amount", rprawrd_accept_date "Accept Date", TO_CHAR(NVL(rprawrd_cancel_amt,rprawrd_decline_amt),\$999,999.00) "Cancel/Decline Amount", TO_CHAR(rprawrd_paid_amt,\$999,990.00) "Paid Amount" FROM rprawrd, rfrbase, rtvawst WHERE rprawrd_fund_code = rfrbase_fund_code AND rprawrd_awst_code = rtvawst_code AND rprawrd_pidm = :PIDM AND rprawrd_aidy_code = :AIDY
<input type="button" value="Update"/>	2	AWRD	Student Financial Aid Awards and Resources	0 SELECT rprarsc_resource_desc "Resource Description", rprarsc_term_code "Term Code", (SELECT stvterm_desc FROM stvterm WHERE stvterm_code = rprarsc_term_code) "Term Description", TO_CHAR(NVL(rprarsc_actual_amt,rprarsc_est_amt),\$999,990.00) "Amount" FROM rprarsc WHERE rprarsc_pidm = :PIDM AND rprarsc_aidy_code = :AIDY



# 4 Problem Resolutions

This section lists the problem resolutions included in the Banner Financial Aid Self-Service 8.12 release. At the time this guide was completed, the following problem resolutions were targeted for delivery with this release.

 **Note**

For comprehensive and detailed problem, impact, and resolution information for all defects corrected in this release, refer to the supplemental problem resolutions file (`faidss81200resolutions.txt`) delivered along with your release guide. The information in this text file is extracted directly from the Customer Support Center just prior to release of the product and may include additional defects that were resolved after this document was finalized.

Object Name	Defect #	Summary
bmenu.P_ FinAidMainMnu	1-HMY52B	Test information text incorrectly delivered for bmenu.P_FinAidMainMnu.
bwrkrhs1.sql & bwrktrk1.sql	1-SZEKGN	Potential issue with input/output validation.
BWRKRHST	1-ULH1QL	Calculated Resource total may display incorrect value.
SELF SERVICE	1-EM3BOQ	Aid year heading squeezed to the left on Award History page.
UPGRADE	1-QYDAGR	twbkwbis.P_ChangePin TWGRWRML record delivered with SOURCE_IND='L'.



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