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Banner Advancement Release Guide

Release 8.7
December 2013



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Revision History

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Executive Summary

As part of Ellucian's ongoing effort to continuously improve the quality of products, services and processes, Banner Advancement® 8.7 introduces new functionality, as described below.

Designation Name Field Increase on ADADESG

The designation name field on the Designation form (ADADESG) was increased from 60 to 120 characters in order to allow you to store longer designation/fund names. The primary goal is to allow entry and viewing of this extended field length on the Designation form (ADADESG). There are many other forms and reports that include the display of the designation name. As feasible and appropriate, these were lengthened to show as much of the 120 characters as possible. However, many will not show all 120 characters. The complete 120 character designation name can be viewed on the ADADESG form.

Adjustment Refinements

The Pledge Adjustment List (AGCPADJ) and Gift Adjustment List (AGCGADJ) forms were re-designed and now display in a tabbed form in order to streamline the process of viewing gift and pledge adjustments. As part of the revised forms, two new tabs, Adjustment List and Adjustment Details, display on each form. When you move back-and-forth between the two tabs, the selected gift or pledge stays in context to further facilitate the process of viewing the transaction adjustment. This new tab format replaces drill-down functionality, for accessing additional levels of detail, which was present in previous releases.

FOAPAL Assignments for Pledge Payments

When feeding pledge payments to Finance, the FOAPAL value will always come from the Payment FOAPAL. This is regardless of whether pledges are fed to Finance (per AGACTRL) and regardless of whether the Feed All Records to Finance indicator (parameter 8) on ADPFEEED is set to Yes or No, when ADPFEEED is run. However, if there is no FOAPAL value in the Payment FOAPAL, the ADPFEEED report will display the informational text "NO FOAPAL." The FOAPAL value in the GURFEED table will match what is shown on the report (i.e. it will be populated with the Payment FOAPAL or it will not be populated).

Manage My Prospects

Banner Advancement Self-Service 8.8 includes a new page named Manage My Prospects, which provides a consolidated list of your active prospect assignments in an easy to use format. This page provides hyperlinks that allow you to quickly drill down to additional details about your prospects. This page is available by selecting the first menu option that displays on the Advancement Officers menu in Banner Advancement Self-Service.

In conjunction with this new page, Banner Advancement 8.7 includes a new form that allows your institution to configure options for the new Manage My Prospects page. This new form is named the Advancement Officer Web Manage My Prospects Validation form (ATVDOPP) and can be used to determine which fields display on the Manage My prospects Page as well as the order in which they appear.

Open Pledge Notification

New functionality provides gift processors with additional information during entry of gift transactions. Previously, gift processors were notified if a donor had open pledges at the time of gift entry. This information helped the gift processor determine whether the transaction was in fact a gift or whether it was a pledge payment. With this release of Banner Advancement, this functionality was expanded to include pledges from associated constituents of particular types. In order to accommodate this new functionality, both the Gift form (AGAGIFT) and Gift Mass Entry form (AGAGMAS) were enhanced to alert the gift processor whether there are open pledges for particular types of associated donors. This alert is provided prior to the gift processor clicking Next Block on AGAGIFT and thus before gift entry begins. This early notification is important as Associated Pledge information can result in the gift processor entering the gift as a third party pledge payment, via the AGATPAY form, instead of a straight gift on AGAGIFT or AGAGMAS.

Most Recent and Largest Recognized Gift and Pledge Transactions

The Giving History Summary form (APAGHIS) now includes fields that identify the most recent and largest recognized gift and pledge transactions for which the donor made the gift or pledge or was given some type of credit. Credit is defined as hard and/or soft credit for a gift or pledge.

Multiple Solicitors for a Project

A new tab on the Prospect Proposal form (AMAPROP) named Additional Staff allows you to add an unlimited number of staff assignments to each project within a proposal. Previously, proposals could consist of one or more projects, but only one staff member could be assigned at the proposal level. The ability to assign a staff member at the proposal-level remains in addition to the ability to add multiple staff to each project within a proposal.

Solicitor Records for Third Party Payments

Previously, when a third-party pledge payment was entered on the AGATPAY form, the logic was not creating gift solicitation records as it should if Pledge Solicitation records existed for the pledge. Similar issues were experienced if you were making a third party pledge payment through the soft and hard credit forms.

Additionally, the logic being used for the AFACLST form to identify pledge payments was not looking at the third party pledge field (AGRGSQL_3PP_PLEDGE_NO) to identify third party pledge payments. Thus, even if these records were being created correctly, as noted above, the form logic was reporting these as gifts instead of pledge payment.

These issues are resolved in Banner Advancement 8.7.

Enhanced Advancement Connector Logic

Effective with this release, enhanced logic determines if the primary donor code is part of the information that has been updated for an advancement individual included in a biographic push. If so, for these individuals only, all biographic data identified in the push profile and populated for this individual will be included in the push, regardless of the activity date associated with these records. This logic change helps ensure that all relevant data is pushed to iModules Encompass when someone first becomes an advancement individual. In these cases, it is likely that much of their Banner biographic data was entered while they were a student and has older activity dates. Prior to this enhancement, that data was not included in the biographic push to iModules Encompass because these older activity dates are prior to the Biographic Push Begin Date value. Please note that this will result in a larger volume of data being included in the push for these particular scenarios.

Automatically Copying Pledge Associated IDs to Pledge Payments

A new parameter on the Pledge Rules tab on the Advancement Control form (AGACTRL) allows you to indicate whether you wish to automatically copy pledge associated IDs to pledge payments. When this option is enabled, the Pledge Associated ID records for a pledge will be automatically copied and associated with any pledge payment transactions for the pledge (Gift Associated IDs) when the pledge payment is entered. Previously, entry of this information was manual, which was error prone and time consuming. When this option is disabled, pledge associated IDs will not be automatically copied to pledge payments and any such records will need to be created manually. This functionality does not apply to third party pledge payments.

Functional Enhancements

This section provides information on the functional enhancements in Banner® Advancement 8.7.

Designation Name Field Increase on ADADESG

The designation name field on the Designation form (ADADESG) was increased from 60 to 120 characters in order to allow you to store longer designation/fund names. The primary goal is to allow entry and viewing of this extended field length on the Designation form (ADADESG). There are many other forms and reports that include the display of the designation name. As feasible and appropriate, these were lengthened to show as much of the 120 characters as possible. However, many will not show all 120 characters. The complete 120 character designation name can be viewed on the ADADESG form.

Since designation names appear on multiple forms, the following forms were updated in order to accommodate the new field length:

- ADAADAJ - Designation Adjustments
- ADACOMT - Designation Comments
- ADADESG - Designation
- ADAGIFT - Designation Gifts
- ADAPLDG - Designation Pledges
- ADASUMM - Designation Fiscal Summary
- ADIAWRD - Designation Financial Aid Query
- ADISUBJ - Designation Subject List
- AEAAFIL - Function Affiliation
- AFACAMP - Campaign Detail
- AGAACKR - Pledge/Gift Acknowledgment Rules
- AGACTRL - Advancement Control
- AGAGIFT - Gift
- AGAGMAS - Gift Mass Entry
- AGAGREC - Gift Receipt
- AGAMATG - Employer Matching Gift Payment
- AGAMGAJ - Waiting Matching Gift Adjustment

- AGAPDEF - Pledge/Gift Default
- AGAPLDG - Pledge
- AGAPMAS - Pledge Mass Entry
- AGAPPAY - Pledge/Gift List
- AGAPREC - Pledge Receipt
- AGAWGIF - Review External Gifts
- AGAWPLG - Review External Pledge
- AGCDESG - Designation Within campaign List
- AGCGIFT - Gift List
- AGCPLDG - Pledge List
- AGIMATG - Employer Waiting Matching Gift Review
- AMADESG - Project Designations
- AOAMTCH - Matching Gift Information
- APADCRL - Gift Society Rules
- APADHIS - Giving History by Designation
- APAFHIS - Giving History by Fiscal Year
- APAGHIS - Giving History Summary
- AXAMGAJ - Expected Matching Gift Adjustment

For additional technical information on this field length increase, please refer to the Technical Changes section of this document.

Adjustment Refinements

Header and Detail Adjustment Refinements

The following changes were made in order to streamline the process of accurately recording header and detail records for pledge and gift adjustments.

- Gifts/Pledge Payment Adjustments - Regardless of the type of adjustment being performed to the gift or pledge payment, a base gift record on AGRAGIF is created for every adjustment. Previously, a header (base gift record) was only created when something on the Gift Adjustment tab of AGAADJS was modified.
- Pledge Adjustments - Each adjustment will result in the creation of one and only one pledge base record on AGRAPLG. Previously, if changes were made at the campaign/designation level to more than one campaign/designation record (when multiple designations existed on the pledge), a pledge base record would be created for each campaign/designation record.



Note: Since the adjustment query forms allow you to view each existing header and detail adjustment record, there was no need to modify existing data. Thus, a cleanup script is not provided in conjunction with this new functionality.

Pledge Adjustment List (AGCPADJ) Refinements

Previously, the Pledge Adjustment List form displayed adjustments for a specific pledge or all pledges associated with a particular Banner ID. When the adjustment list appeared, you could scroll through and view pledges in the list and drill down in order to view additional adjustment details for the pledge.

In order to streamline the process of viewing pledge adjustments, the Pledge Adjustment List form now displays in a tab format. When you access the form, two new tabs (Adjustment List and Adjustment Detail) will appear and allow you to view all pledge adjustments for the specified Banner ID and or/Pledge Number.

The following new tabs appear on the Pledge Adjustment List (AGCPADJ) form:

- Adjustment List - When you enter the Banner ID and/or Pledge Number in the Key Block and click Next Block, the Adjustment List tab appears and is selected by default. The header block displays two rows of information about the adjustment, including the Pledge Number, Sequence Number, and other high-level information. Directly below the header block, each pledge adjustment associated with the ID and/or Pledge displays in a side-by-side comparison so you can see details of the pledge before and after the adjustment. Each pledge adjustment contains one Adjustment List record. As you scroll through the list, the attributes in the header block, including the Pledge Number and Sequence Number, will change to reflect the selected pledge adjustment. If a Pledge Number is not entered in the key block, records are sorted by Pledge Number (in ascending order) and then by Sequence Number (in ascending order). If a Pledge Number is entered in the key block, records are sorted by Sequence Number (in

ascending order). Comments that were previously available by selecting the Comments button, or via the Options Menu, are now available on this new tab.

- Adjustment Detail - When adjustment details exist for the adjustment (i.e. adjustments were done to campaign/designation level data on the Pledge Adjustment Detail tab), the Adjustment Detail tab allows you to view additional attributes about the adjustment. If there are no adjustment detail records to display for an adjustment, the Adjustment Detail tab will appear grayed out to indicate no detail-level data was modified as part of the adjustment.

When a Pledge Number is Entered in the Key Block

When you are on the Adjustment List tab, you can scroll through all of the adjustment records associated with the pledge # entered in the key block.

When you move from the Adjustment List tab to the Adjustment Details tab, the adjustment in context when the other tab is selected will remain the same and the details for that particular adjustment will display as the default on the Adjustment List tab. For example, if the pledge had 3 adjustments and adjustment #2 is in context when you select the Adjustment Detail tab, the detail information for adjustment #2 will display by default. You can scroll to view the detail information associated with the other adjustments done to this particular pledge.

The reverse is also true - if you are moving from the Adjustment Detail tab to the Adjustment List tab, the adjustment in context when the other tab is selected will be maintained. You have the option of scrolling through the other available adjustment records on the Adjustment List tab.

When the Pledge Number is Not Entered in the Key Block

In this case, all adjustments done to pledges for this Banner ID are being requested.

Similar to the scenario above, you can scroll through the adjustment records on the Adjustment List tab. You can scroll through all pledge adjustments done for the Banner ID instead of just the adjustments related to a particular pledge #.

When the Adjustment Details tab is selected, you can only view the adjustment detail records for pledge adjustment in context on the Adjustment List tab. Therefore, if a pledge had three adjustments and all of these had changes to at least one of the campaign/designation combinations, you can view records for all three of these pledge adjustments on the Adjustment Details tab when this pledge # is selected on the Adjustment List tab. You cannot view Adjustment Details for a different pledge # unless you select the desired pledge # on the Adjustment List tab then select the Adjustment Details tab.

If you are positioned in adjustment #2 for a pledge on the Adjustment List tab and then select the Adjustment Detail tab, you will automatically be positioned on that same adjustment on the Adjustment detail tab. You can use the scroll bar to look at any other detail records associated with other adjustments done to this particular pledge.

The reverse is also true - if you move from the Adjustment Detail tab to the Adjustment List tab, the adjustment in context is maintained. You have the option of then scrolling through all of the other pledge adjustment records on the Adjustment List tab.

Adjustment List tab

Oracle Fusion Middleware Forms Services: Open > AGCPADJ

Pledge Adjustment List AGCPADJ 8.7 (s10b80)

ID: 045182 Helen Jones Category: ALUM Class: 1985
 Spouse: 045183 Donald Jones Category: ALUM Class: 1985
 Pledge: 0003083 Void Conditional Exist Met

Adjustment List Adjustment Detail

Pledge: 0003083 Sequence Number: 1 Activity Date: 18-DEC-2012 User: JSMITH
 Comment Class: Comment:

Before Adjustment		After Adjustment	
Pledge Date:	18-DEC-2012 Fiscal Year: 2013	Pledge Date:	18-DEC-2012 Fiscal Year: 2013
Amount:	10,000.00	Amount:	12,000.00
Type:	RP Regular Pledge	Type:	RP Regular Pledge
Vehicle:		Vehicle:	
Range:	P4 Pledge Range 4	Range:	P4 Pledge Range 4
Status:	A Active	Status:	A Active
Class 1:		Class 1:	
Class 2:		Class 2:	
Class 3:		Class 3:	
Reminder:		Reminder:	
Category:		Category:	
External Pledge ID:		External Pledge ID:	
Comment:		Comment:	

Pledge Number. Record: 1/? <<OSC>

Adjustment Details tab

Oracle Fusion Middleware Forms Services: Open > AGCPADJ

Pledge Adjustment List AGCPADJ 8.7 (s10b80)

ID: 045182 Helen Jones Category: ALUM Class: 1985
 Spouse: 045183 Donald Jones Category: ALUM Class: 1985
 Pledge: 0003083 Void Conditional Exist Met

Adjustment List **Adjustment Detail**

Pledge: 0003083 Transaction Sequence: 1 Adjustment Date: 18-DEC-2012
 Adjustment User: JSMITH

Feed To Finance: Indicator: Feed Date: Batch ID:

Entry Date: 18-DEC-2012

Before				After		
Pledge	Campaign	Designation	Amount	Campaign	Designation	Amount
0003083	AF13	ZR87	10,000.00	AF13	ZR87	12,000.00

Adjustment User. Record: 1/4 <<OSC>

Gift Adjustment List (AGCGADJ) Refinements

Previously, the Gift Adjustment List form displayed adjustments for a specific gift or all gifts associated with a particular Banner ID. When the adjustment list appeared, you could scroll through and view gifts in the list and drill down in order to view additional adjustment details for the gift.

In order to streamline the process of viewing gift adjustments, the Gift Adjustment List form now displays in a tab format. When you access the form, two new tabs (Adjustment List and Adjustment Detail) will appear and allow you to view all gift adjustments for the specified Banner ID and or/Gift Number.

The following new tabs appear on the Gift Adjustment List (AGCGADJ) form:

- **Adjustment List** - When you enter the Banner ID and/or Gift Number in the Key Block and click Next Block, the Adjustment List tab appears and is selected by default. The Header Block displays two rows of information about the adjustment, including the Gift Number, Sequence Number, and other high-level information. Directly below the Header Block, each gift adjustment associated with the ID and/or Gift displays in a side-by-side comparison so you can see details of the gift before and after the adjustment. Each gift adjustment contains one Adjustment List record. As you scroll through the list, the attributes in the Header Block, including the Gift Number and Sequence Number, will change to reflect the selected gift adjustment. If a Gift Number is not entered in the key block, records are sorted by Gift Number (in ascending order) and then by Sequence Number (in ascending order). If a Gift Number is entered in the key block, records are sorted by Sequence Number (in ascending order).
- **Adjustment Detail** - When adjustment details exist for the adjustment (i.e. adjustments were done to campaign/designation level data on the Gift Adjustment Detail tab), the Adjustment Detail tab allows you to view additional attributes about the adjustment. If there are no adjustment detail records to display for an adjustment, the Adjustment Detail tab will appear grayed out to indicate detail-level data was not modified as part of the adjustment.

When a Gift Number is Entered in the Key Block

When you are on the Adjustment List tab, you can scroll through all of the adjustment records associated with the gift # entered in the key block.

When you move from the Adjustment List tab to the Adjustment Details tab, the adjustment in context when the other tab is selected will remain the same and the details for that particular adjustment will display as the default on the Adjustment List tab. For example, if the gift had 3 adjustments and adjustment #2 is in context when you select the Adjustment Detail tab, the detail information for adjustment #2 will display by default. You can scroll to view the detail information associated with the other adjustments done to this particular gift.

The reverse is also true - if you are moving from the Adjustment Detail tab to the Adjustment List tab, the adjustment in context when the other tab is selected will be maintained. You have the option of scrolling through the other available adjustment records on the Adjustment List tab.

When the Gift Number is Not Entered in the Key Block

In this case, all adjustments done to gifts for this Banner ID are being requested.

Similar to the scenario above, you can scroll through the adjustment records on the Adjustment List tab. You can scroll through all gift adjustments done for the Banner ID instead of just the adjustments related to a particular gift #.

When the Adjustment Details tab is selected, you can only view the adjustment detail records for gift adjustment in context on the Adjustment List tab. Therefore, if a gift had three adjustments and all of these had changes to at least one of the campaign/ designation combinations, you can view records for all three of these gift adjustments on the Adjustment Details tab when this pledge # is selected on the Adjustment List tab. You cannot view Adjustment Details for a different gift # unless you select the desired gift # on the Adjustment List tab then select the Adjustment Details tab.

If you are positioned in adjustment #2 for a gift on the Adjustment List tab and then select the Adjustment Detail tab, you will automatically be positioned on that same adjustment on the Adjustment detail tab. You can use the scroll bar to look at any other detail records associated with other adjustments done to this particular gift.

The reverse is also true - if you move from the Adjustment Detail tab to the Adjustment List tab, the adjustment in context is maintained. You have the option of then scrolling through all of the other gift adjustment records on the Adjustment List tab.

Adjustment List tab

The screenshot shows the Oracle Fusion Middleware Forms Services interface for the 'Adjustment List' tab. The form is titled 'Gift Adjustment List - AGCGADJ 8.7 (s10b80)'. It features a menu bar with 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. Below the menu bar is a toolbar with various icons. The main form area is divided into several sections:

- Header Section:** Contains fields for ID (045182), Name (Helen Jones), Category (ALUM), and Class (1985). Below this are fields for Spouse (045183, Donald Jones), Gift (045183), and a 'Void' checkbox.
- Navigation:** Two tabs are visible: 'Adjustment List' (highlighted in red) and 'Adjustment Detail'.
- Key Block:** Contains fields for Gift (0013058), Adjustment Sequence Number (1), Cashier (Y), and Activity (13-SEP-2012). Below this are fields for Comment Class and Comment.
- Before Adjustment Section:** Contains fields for Gift Date (29-AUG-2012), Amount (1,000.00), Gift Type (CA Cash), Vehicle, Fiscal Year (2013), Range (G3 Gift Range 3), Feed (checkbox), User (JSMITH), Entry Date (29-AUG-2012), Document, Session Indicator (F), and Class 1, 2, 3.
- After Adjustment Section:** Contains fields for Gift Date (29-AUG-2012), Amount (800.00), Gift Type (CA Cash), Vehicle, Fiscal Year (2013), Range (G2 Gift Range 2), User (JSMITH), Entry (29-AUG-2012), Number (16), Session Indicator (F), and Class 1, 2, 3.

At the bottom of the form, there is a 'Gift Number' field and a 'Record: 1/?' indicator.

Adjustment Detail tab

The screenshot displays the Oracle Fusion Middleware Forms Services interface for the 'Adjustment Detail' tab. The window title is 'Oracle Fusion Middleware Forms Services: Open > AGCGADJ'. The main title bar reads 'Gift Adjustment List AGCGADJ 8.7 (s10b80)'. The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. The main content area is divided into several sections:

- Header Information:** ID: 045182, Name: Helen Jones, Category: ALUM, Class: 1985. Spouse: 045183, Name: Donald Jones, Category: ALUM, Class: 1985. Gift: (blank), with a 'Void' checkbox.
- Adjustment List:** A tab labeled 'Adjustment Detail' is selected and highlighted with a red box.
- Transaction Details:** Gift: 0013058, Transaction Sequence Number: 1, Date of Adjustment: 29-AUG-2012, Cashier: JSMITH, Entry: 29-AUG-2012, Session Indicator: F, Number: 16, Feed to Finance: (checkbox), Indicator: (checkbox), Feed Date: (blank), Batch ID: (blank).
- Before/After Comparison:** Two side-by-side tables showing the state of the gift before and after the adjustment.

Before				After			
User: JSMITH				User: JSMITH			
Date: 29-AUG-2012 Fiscal Year: 2013				Date: 29-AUG-2012 Fiscal Year: 2013			
Type: CA Cash				Type: CA Cash			
Pledge	Campaign	Designation	Amount	Pledge	Campaign	Designation	Amount
0002595	AF13	ZR87	500.00	0002595	AF13	ZR87	400.00
0002595	AF13	ZR87	500.00	0002595	AF13	ZR87	400.00

Record: 1/2 | ... | <<OBC>

FOAPAL Assignments for Pledge Payments

When feeding pledge payments to Finance, the FOAPAL value will always come from the Payment FOAPAL. This is regardless of whether pledges are fed to Finance (per AGACTRL) and regardless of whether the Feed All Records to Finance indicator (parameter 8) on ADPFEED is set to Yes or No, when ADPFEED is run. However, if there is no FOAPAL value in the Payment FOAPAL, the ADPFEED report will display the informational text "NO FOAPAL." The FOAPAL value in the GURFEED table will match what is shown on the report (i.e. it will be populated with the Payment FOAPAL or it will not be populated).

Manage My Prospects

Banner Advancement Self-Service 8.8 includes a new page named Manage My Prospects, which provides a consolidated list of your active prospect assignments in an easy to use format. This page provides hyperlinks that allow you to quickly drill down to additional details about your prospects. This page is available by selecting the first menu option that displays on the Advancement Officers menu in Banner Advancement Self-Service.

In conjunction with this new page, Banner Advancement 8.7 includes a new form that allows your institution to configure options for the new Manage My Prospects page. This new form is named the Advancement Officer Web Manage My Prospects Validation form (ATVDOPP) and can be used to determine which fields display on the Manage My prospects Page as well as the order in which they appear.

The ATVDOPP form displays a record for each column supported for display on the Manage My Prospects Self-Service page. These records are stored in the ATVDOPPOP table and are provided as seed data.

For additional information, please refer to the *Banner Advancement Self-Service 8.8 Release Notes* and the *Banner Advancement Self-Service 8.8 User Guide*.

The screenshot shows a web browser window titled "Advancement Officer Web Manage My Prospects Validation Form ATVDOPP 8.7 (s10b80)". The main content is a table with the following columns: Code, Description, Sequence, Display, and Activity Date. The table contains seven rows of configuration data, each with a "Section Title" field below it.

Code	Description	Sequence	Display	Activity Date
STATUS	Status	1	<input checked="" type="checkbox"/>	09-OCT-2013
Section Title: Status				
LAPSEDMOVES	Lapsed Planned Moves	2	<input checked="" type="checkbox"/>	09-OCT-2013
Section Title: Lapsed Planned Moves				
NXTMOVETYPDT	Next Open Move Type and Date	3	<input checked="" type="checkbox"/>	09-OCT-2013
Section Title: Next Open Move Type and Date				
PRIMSTAFASSG	Primary Staff Assignment	4	<input checked="" type="checkbox"/>	09-OCT-2013
Section Title: Primary Staff Assignment				
ASSIGNTYPE	Assignment Type	5	<input checked="" type="checkbox"/>	09-OCT-2013
Section Title: Assignment Type				
OPENPROP	Open Proposals	6	<input checked="" type="checkbox"/>	09-OCT-2013
Section Title: Open Proposals				
LRGGIFT	Largest Recognized Gift	7	<input checked="" type="checkbox"/>	09-OCT-2013
Section Title: Largest Recognized Gift				

Open Pledge Notification

New functionality provides gift processors with additional information during entry of gift transactions. Previously, gift processors were notified if a donor had open pledges at the time of gift entry. This information helped the gift processor determine whether the transaction was in fact a gift or whether it was a pledge payment. With this release of Banner Advancement, this functionality was expanded to include pledges from associated constituents of particular types. In order to accommodate this new functionality, both the Gift form (AGAGIFT) and Gift Mass Entry form (AGAGMAS) were enhanced to alert the gift processor whether there are open pledges for particular types of associated donors. This alert is provided prior to the gift processor clicking Next Block on AGAGIFT and thus before gift entry begins. This early notification is important as Associated Pledge information can result in the gift processor entering the gift as a third party pledge payment, via the AGATPAY form, instead of a straight gift on AGAGIFT or AGAGMAS.

Setup and Use

This section describes how to setup and use the new notification functionality for Associated Pledges.

Cross Reference Validation Form (ATVXREF)

A new field on the Cross Reference Validation form (ATVXREF) named **Associated Pledges** allows you to indicate whether open pledges for the selected cross-reference type should be included in the Associated Pledges notification functionality on AGAGIFT and AGAGMAS. By default, this check box will be unchecked on all cross reference rows when you upgrade to Banner Advancement 8.7.

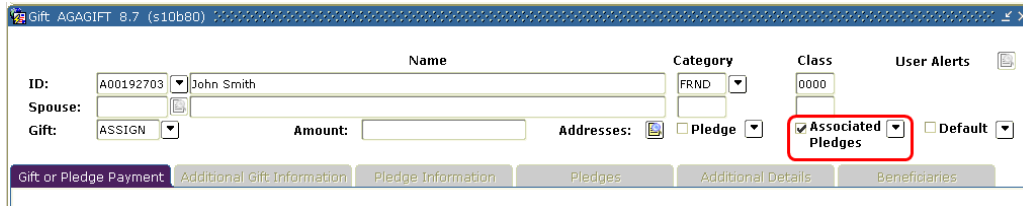
For example, let's say you have a Cross Reference code of FDN for Family Foundation, and you check the Associated Pledges check box for the row on ATVXREF. By checking this box, you are indicating that if a gift is being entered for a Banner ID and that Banner ID has a cross-reference record to a Family Foundation (via the APAXREF form) and that Family Foundation has open pledges, the gift processor will be notified of the open Family Foundation pledges during gift entry.



Code	Description	Reverse	Spouse	Employer	Match	Household	Associated Pledges	Split	Hard or Soft	Activity Date
FAM	Family Member	FDN	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9	S	14-AUG-2013
FDN	Family Foundation	FAM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			12-AUG-2013
FEP	Former Employee	FER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			08-JUL-1991
FER	Former Employer	FEP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			04-JUN-2009
HUS	Husband	WIF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	H	14-AUG-2013

Gift Form (AGAGIFT)

The Gift form (AGAGIFT) has a new field in the Key Block named **Associated Pledges**, which consists of a check box and drop-down. If the ID in the Key Block has other Banner IDs as cross-references (via APAXREF) and those IDs have the Associated Pledges check box checked on ATVXREF, and that Banner ID has any open pledges, the **Associated Pledges** check box will be checked automatically. This is an indicator to the gift processor that they should select the drop-down to view the list of open associated pledges.

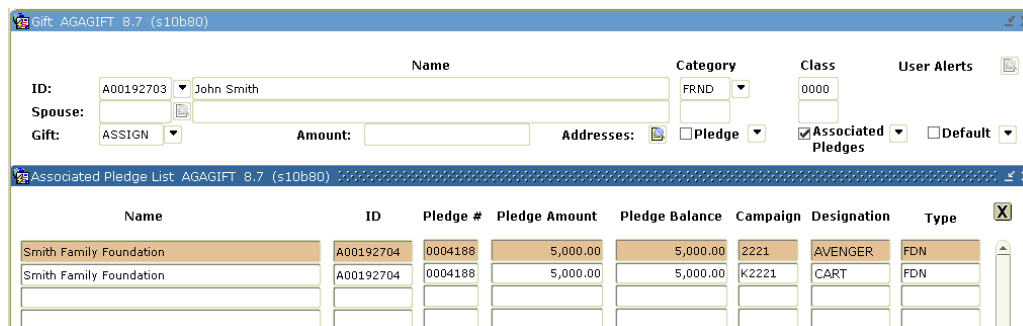


The screenshot shows the Gift Form (AGAGIFT) interface. The 'Associated Pledges' field is highlighted with a red box. The form includes fields for ID, Name, Category, Class, User Alerts, Spouse, Gift, Amount, Addresses, Pledge, and Default. The 'Associated Pledges' field is checked and set to 'Associated Pledges'.

Associated Pledge List

When the gift processor clicks the **Associated Pledges** drop-down, the Associated Pledge List will appear and display a list of all open associated pledges. In the example below, there is one open pledge that has two different campaign/designation combinations. Therefore, two lines display for this one open pledge. This helps the gift processor determine if the gift received should be entered as a pledge payment for this pledge.

Using this information, the gift processor can determine whether or not the gift should actually be entered as a third-party pledge payment by this Banner ID (John Smith) for the open Smith Family Foundation pledge. If so, the gift operator can navigate to the Third Party payment form (AGATPAY) to enter the third party pledge payment.



The screenshot shows the Associated Pledge List sub-form. The table displays the following data:

Name	ID	Pledge #	Pledge Amount	Pledge Balance	Campaign	Designation	Type
Smith Family Foundation	A00192704	0004188	5,000.00	5,000.00	2221	AVENGER	FDN
Smith Family Foundation	A00192704	0004188	5,000.00	5,000.00	K2221	CART	FDN

The sort order on this sub-form is:

- 1st sort - Last Name (in ascending order)
- 2nd sort – Pledge # (in ascending order to show earlier pledges first)

Gift Mass Entry Form (AGAGMAS)

A new field named Associated Pledges displays on the IDs tab of the Gift Mass Entry form. This field remains inactive until you enter an ID. When you enter an ID, the drop-down becomes active if there are open associated pledges for the ID. This information displays in order to help you determine whether the gift should be a gift or a pledge payment. If it should be entered as a pledge payment, this is an indication to navigate to the third party pledge payment form and enter in the correct information using the information on this Associated Pledges List. You can open the Associated Pledge List as many times as desired.

The screenshot shows the 'Gift Mass Entry AGAGMAS 8.7 (s10b80)' window with the 'IDs' tab selected. The interface includes a table with the following columns: ID, Associated Pledges, User Alerts, Category, Class, Pledge, Gift Amount, Benefit, and Gift Number. The first row of data shows 'A00192703' in the ID column, 'John Smith' in the Associated Pledges column, 'FRND' in the Category column, '0000' in the Class column, and '00000000' in the Pledge column. The 'Associated Pledges' dropdown menu is highlighted with a red box.

ID	Associated Pledges	User Alerts	Category	Class	Pledge	Gift Amount	Benefit	Gift Number
A00192703	John Smith		FRND	0000	00000000			

Most Recent and Largest Recognized Gift and Pledge Transactions

The Giving History Summary form (APAGHIS) now includes fields that identify the most recent and largest recognized gift and pledge transactions for which the donor made the gift or pledge or was given some type of credit. Credit is defined as hard and/or soft credit for a gift or pledge

The screenshot shows the 'Giving History Summary' form for Mr. Ethan Barnes. It includes fields for ID, Name, Category, Class, and Spouse. Below this is a section for 'Pledge Summary' and 'Gift Summary'. The 'Pledge Summary' table lists total pledges, most recent, largest, most recent recognized, and largest recognized transactions with their respective amounts, dates, and years. The 'Gift Summary' table lists total gifts, most recent, largest, most recent recognized, and largest recognized transactions with their respective amounts, dates, and years. At the bottom, there are summary totals for Pledges, Payments, Balance, and Soft Credit.

Pledge Summary		Pledge	Status	Amount	Date	Year
Total Pledges	124					
Most Recent:	0004192	Active	5,000.00	12-NOV-2013	2014	
Largest:	0003949	Active	50,000.00	19-JUL-2013	2014	
Most Recent Recognized:	0004192	Active	5,000.00	12-NOV-2013	2014	
Largest Recognized:	0003949	Active	50,000.00	19-JUL-2013	2014	
Pledges	-	Payments	=	Balance	Soft Credit	
62,215,071.51		53,519.52		62,161,551.99	49,316.00	

Gift Summary		Gift	Amount	Date	Year
Total Gifts	197				
Most Recent:	0015919		1,112.00	12-NOV-2013	2014
Largest:	0015687		300,000.00	09-SEP-2013	2014
Most Recent Recognized:	0015919		1,112.00	12-NOV-2013	2014
Largest Recognized:	0015687		300,000.00	09-SEP-2013	2014

Giving History Summary form (APAGHIS)

The following data blocks on the Giving History Summary form (APAGHIS) form were modified in order to support this new functionality.

- Pledge Summary Data Block
- Gift Summary Data Block

Pledge Summary and Gift Summary Data Blocks

The following fields were added to both the Pledge Summary and Gift Summary data blocks. Although the descriptions below specifically describe the fields in the Pledge Summary data block, the same descriptions also apply to the new fields in the Gift Summary data block.

Field	Description
Most Recent Recognized	<p>This field displays the Pledge # of the most recently recognized pledge. When determining the most recent pledge, Banner will identify all pledge transactions for which this donor made or has hard credit and/or soft credit. Next, all of those records are examined to determine which one is the most recent. Once the pledge is identified, the pledge # will display in this field. The information for this pledge will also display in the existing Amount, Date and Year fields.</p> <p>If there is more than one qualifying pledge with the same most recent date, Banner will use the following information to determine which pledge to display:</p> <ul style="list-style-type: none"> • Donor's Pledge – If the Donor ID in the Key Block matches the Donor ID on the pledge, as opposed to a pledge made by a different Donor ID, that transaction will be identified as the most recent). If there are multiple pledges where the Donor ID matches the Donor ID on the pledge, the first pledge encountered will display. If the Donor ID in the Key Block doesn't match the Donor ID on any pledge, the Hard Credit field will be examined to determine which pledge to display. • Hard Credit – If the Donor ID in the Key Block doesn't match the Donor ID on any pledge, this field will be used to determine which pledge to display. If there is only one pledge to which the Donor ID in the Key Block received hard credit on that day, that pledge will display. If there are multiple pledges for which the Donor ID received hard credit on that day, the first pledge encountered will display. If there are no pledges to which the ID in the Key Block received hard credit, the soft credit field will be examined to determine which pledge to display. • Soft Credit- If the Donor ID in the Key Block doesn't match the Donor ID on any pledge, and the Donor ID didn't receive hard credit for any identified pledges, this field will be used to determine which pledge to display. If there is only one pledge to which the Donor ID in the Key Block received soft credit on that day, that pledge will display. If there are multiple pledges for which the Donor ID received soft credit on that day, the first pledge encountered will display. If there are no pledges to which the ID in the Key Block received soft credit, no value will appear in this field.

Field	Description
Largest Recognized	This field displays the Pledge # of the largest recognized pledge. When determining the largest pledge, Banner will first identify all pledge transactions for which this donor made or has hard credit and/or soft credit. Next, all of those records are examined to determine which has the largest base pledge amount. Once the pledge is identified, the Pledge # will display in this field. The information for this pledge will also display in the existing Amount, Date and Year fields. If there is more than one pledge with the same highest amount, the pledge with the most recent date will be considered the largest recognized pledge.

To the right of both new fields, an icon allows you to drill-down and view the Recognition Details sub-form, which displays additional information. If the pledge is made by someone else, not the Donor ID in the Key Block, this additional detail aims to help you understand the level of hard and/or soft credit this person was given on the pledge. If the icon is inactive, the record cannot be selected because there is no detail to display.

When you select the icon, a record will display with the following information.

Field	Description
Donor ID	This is the ID of the person that made the pledge. This may or may not be the same ID that appears in the Key Block.
Donor Name	This is the name of the person that made the pledge. This may or may not be the same name that appears in the Key Block.
Recognition Amount	This is the amount of credit the ID in the Key Block received for this pledge. If the ID in the Key Block received both hard and soft credit for this pledge, only the highest credit amount will be reflected here.
Recognition Type	This field indicates the type of recognition for the ID in the Key Block. Valid values include Self (they made the pledge), Soft (they received soft credit) and Hard (they received hard credit).

Most Recent and Largest Recognized Gift and Pledge Example

To further illustrate this functionality, let's examine the following example:

- Jim Smith made a pledge of \$12,000 on 1/1/2010 (Pledge #111)
- Mary Smith (Jim's spouse) made a pledge of \$10,000 on 2/1/2012 (pledge #222). This is the only pledge Mary has ever made.
- The institutional policy is to always split hard credit with the spouse for both gifts and pledges.

Under these circumstances, the following data would exist:

Jim Smith

- Pledge #111 - \$12,000 base pledge credit for \$12,000 pledge he made on 1/1/2010
- Pledge #222 - \$5000 hard credit for \$10,000 pledge made by Mary 2/1/2012

Mary Smith

- Pledge #111 - \$6,000 hard credit for \$6,000 pledge made by Jim on 1/1/2010
- Pledge #222 - \$10,000 base pledge credit for \$10,000 pledge she made on 2/1/2012

With the new logic, the following will appear in the new pledge-related fields on APAGHIS:

Jim Smith

- Largest Recognition: Pledge #111
- Most Recent Recognition: Pledge #222

Mary Smith

- Largest Recognition: Pledge #222
- Most Recent Recognition: Pledge #222

Giving History in Self-Service

The Pledge Summary and Gift Summary sections of the Overall Giving view in Banner Advancement Self-Service was enhanced in order to include the new Most Recent Recognized and Largest Recognized fields.

For additional information on this new functionality in Self-Service, please refer to the Banner Advancement Self-Service 8.8 Release Notes or the Banner Advancement Self-Service User Guide.

Multiple Solicitors for a Project

A new tab on the Prospect Proposal form (AMAPROP) named Additional Staff allows you to add an unlimited number of staff assignments to each project within a proposal. Previously, proposals could consist of one or more projects, but only one staff member could be assigned at the proposal level. The ability to assign a staff member at the proposal-level remains in addition to the ability to add multiple staff to each project within a proposal.

Prospect Proposal AMAPROP 8.7 (s10b80)

ID: A00192668 Mr. Ethan Barnes Category: ALUM Class: 1996 User Alerts

Spouse: A00192669 Mrs. Samantha Barnes

Proposals | Proposal Change History | Project Change History

Proposal Code: BLTZ Our Promise Campaign Sequence: 1 Create Date: 21-SEP-2013

Status: A Active Status Date: 07-SEP-2013

Amount: 250,000.00

Staff: APU ID: Charles Block Due Date:

Projects | Proposal Comments

Summary | Details | Results | **Additional Staff**

Project	Giving Vehicle	Status	Target Ask Amount
ANNUAL Annual Project	KC Annuity	A Active	
PERF Center for the Performing Arts	CT Charitable Remainder Trust	A Active	
TERM Term Challenge Scholarship	AN Gift Annuity	A Active	

When you select the Additional Staff tab, all staff members assigned to the project in context will display. You can add as many staff as necessary. Only one additional staff member can have the Primary check box checked, however it is not required that there be a primary additional staff member.

Projects | Proposal Comments

Summary | Details | Results | **Additional Staff**

Project: ANNUAL Annual Project

Staff	ID	Primary	Name
AMR		<input type="checkbox"/>	Ann Rollie
BG		<input type="checkbox"/>	Bill Gourrn
CJS		<input checked="" type="checkbox"/>	Carol Sarmol
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

Fields in the new Additional Staff tab include the following:

Field	Description
Project	This is the name of the project to which the additional staff member is being added. This value will reflect the project you were current on when you selected the Additional Staff tab. If you are not current on the project for which you wish to add the additional staff, navigate back to the Summary tab and select the correct project. Display only.
Staff	This is the abbreviation of the additional staff member assigned to the project. Either this Staff or ID field can be populated, but not both. Selecting the drop-down will allow you to locate the staff member via the Staff Assigned to Prospect or User Identification forms. Pressing F9 instead of selecting the drop-down will open the Staff Assigned to Prospect prompt. Required if ID is not populated.
ID	This is the Banner ID of the additional staff member assigned to the project. Either this ID or the Staff field can be populated, but not both. Selecting the drop-down will allow you to locate the staff member via the Staff Assigned to Prospect, Person Search or Constituent Search. Pressing F9 instead of selecting the drop-down will open the Staff Assigned to Prospect prompt. Required if Staff is not populated.
Primary	This check box indicates whether the additional staff member is primary on the project. Only one additional staff member can have this check box checked. A primary additional staff is not required and this check box can be blank on all additional staff rows for a project, if applicable. If you wish to change which staff is primary, you must un-check the current primary record check box, save, then check this box on the new record. Optional
Name	This is the name of the additional staff member. This value will populate automatically with the name of the staff member when you enter a value in either the Staff or ID field. Display only.

Self-Service

In addition to the aforementioned changes in Banner Advancement, Self-Service was updated in order to include Additional Staff information on the Prospect Proposals section of the Long and Short Prospect Profiles. For additional information, please refer to the Banner Advancement Self-Service Release Notes or User Guide.

Solicitor Records for Third Party Payments

Previously, when a third-party pledge payment was entered on the AGATPAY form, the logic was not creating gift solicitation records as it should if Pledge Solicitation records existed for the pledge. Similar issues were experienced if you were making a third party pledge payment through the soft and hard credit forms.

Additionally, the logic being used for the AFACLST form to identify pledge payments was not looking at the third party pledge field (AGRGSOL_3PP_PLEDGE_NO) to identify third party pledge payments. Thus, even if these records were being created correctly, as noted above, the form logic was reporting these as gifts instead of pledge payment.

These issues are resolved in Banner Advancement 8.7.

Upgrade Considerations

Optional upgrade scripts can be run if you would like the missing gift solicitation records from third party pledge payments to be created. The records in the hard and soft credit tables (AGRGMEN and AGRGIDS) indicate which records are third party pledge payments through the population of the third party pledge columns.

The following scripts can be run to create these records:

- agrgsoli_080700_01.sql - Uses soft credit information to create missing solicitation records)
- agrgsoli_080700_02.sql - Uses hard credit information to create missing solicitation records)

This information, in combination with the Pledge Solicitor rules set-up on the AGAPSOL form for the referenced pledge, provide the necessary information for the correct generation of the AGRGSOL records for third party pledge payments. The scripts will first check to verify whether or not the gift solicitation records exist, and if so, the scripts will not insert new ones as these would be duplicates.

Enhanced Advancement Connector Logic

Effective with this release, enhanced logic determines if the primary donor code is part of the information that has been updated for an advancement individual included in a biographic push. If so, for these individuals only, all biographic data identified in the push profile and populated for this individual will be included in the push, regardless of the activity date associated with these records. This logic change helps ensure that all relevant data is pushed to iModules Encompass when someone first becomes an advancement individual. In these cases, it is likely that much of their Banner biographic data was entered while they were a student and has older activity dates. Prior to this enhancement, that data was not included in the biographic push to iModules Encompass because these older activity dates are prior to the Biographic Push Begin Date value.

Please note that this will result in a larger volume of data being included in the push for these particular scenarios.

Advancement Individual Information APACONS 8.7 (s10b80)

	Name	Category
ID:	A00192668 Mr. Ethan Barnes	ALUM
Spouse:	A00192669 Mrs. Samantha Barnes	

Base Information Donor Categories Spouse

Donor Category: ALUM Alumna/us

Class Year: 1996

College: AS College of Arts & Sciences

Preferred Address: HO Home Address

Region Address: HO Home Address

External Ratings

As in previous releases, if the primary Donor Category code hasn't changed, only the biographic changes that falls within the specified date range for the push will be sent from Banner to iModules Encompass.

This new functionality applies to biographic data being pushed manually and by the scheduler.

In addition to changes to the primary Donor Category code via students becoming advancement individuals, it is possible for the primary Donor Category code to change for other reasons, which would also trigger this new logic. While the Base Information tab on the APACONS form displays the primary Donor Category code, the Donor Categories tab on APACONS allows you to specify additional Donor Category codes. An individual may have multiple codes if they are, for example, an Alumna/us, parent, and staff member. When multiple Donor Category codes exist, Banner uses the hierarchy specified on the Donor Category Code Validation form (ATVDONR) to determine which is the primary Donor Category code. If an individual has a new record added to their list of Donor Category records on the Donor Categories tab on APACONS, and the new code has a higher priority (lower sequence number) than any of the existing Donor Category records, this will trigger a change in their primary Donor Category code and thus trigger this new logic that looks for changes to the primary Donor Category code.



Warning! The push profile must include Donor Category as one of the elements. If it is not included, this new logic that results in a full refresh of biographic data will not function. For additional information on push profiles, please refer to the Banner Advancement DataLoad Extract Handbook.

Automatically Copying Pledge Associated IDs to Pledge Payments

A new parameter on the Pledge Rules tab on the Advancement Control form (AGACTRL) allows you to indicate whether you wish to automatically copy pledge associated IDs to pledge payments. This parameter is turned off by default. Previously, entry of this information was manual, which was error prone and time consuming. This functionality does not apply to third party pledge payments.

- When this option is enabled, the Pledge Associated ID records for a pledge will be automatically copied and associated with any pledge payment transactions for the pledge (Gift Associated IDs) when the pledge payment is entered.
- When this option is disabled, pledge associated IDs will not be automatically copied to pledge payments and any such records will need to be created manually.

The screenshot shows the 'Pledge Rules' tab in the Advancement Control AGACTRL 8.7 (s10b80) application. The interface includes several tabs: Supervisors, Institution, Statement of Giving, Pledge Rules (selected), Matching Gift Processing Rules, and Self-Service. The 'Pledge Rules' section contains the following fields:

- Unconditional Pledge Category:** UNCON (dropdown) Unconditional Pledge
- Advancement uses BANNER Finance:** Yes, No
- Advancement feeds Pledges to Finance:** Yes, No
- Default Pledge Type Code:** RP (dropdown) Regular Pledge
- Copy Pledge Associated IDs to pledge payments:** Yes, No (highlighted with a red box)
- Include pledge balance details in the calculation of the Percentage of Goal for campaign tracking:** Yes, No

This new switch controls the behavior of the following forms:

- AGAGIFT - Gift Entry form
- AGAGMAS - Gift Mass Entry form
- AGAWGIF - Review External Gift Load form
- AGPALMP - Process Submission Control form / Automatic Deduction Process

Technical Changes

This section describes the technical changes in Banner® Advancement 8.7. In addition to these changes, please refer to the Technical Changes section of the Banner Advancement Self-Service 8.8 Release Guide.

Designation Name Field Increase on ADADESG

Column Length Change - ADBDESG

The following column length was increased in the ADBDESG table in order to allow you to store longer designation names.

Column	Previous Length	New Length
ADBDESG_NAME	VARCHAR2(60)	VARCHAR2(120)

Manage My Prospects

New Table - AOBDOPP

The following table was added in order to support the Manage My Prospects functionality.

Column	Datatype
AOBDOPP_PIDM	NUMBER(8)
AOBDOPP_PROS_ASSG_PREF	VARCHAR2(1)
AOBDOPP_ACTIVITY_DATE	DATE
AOBDOPP_USER_ID	VARCHAR2(30)
AOBDOPP_DATA_ORIGIN	VARCHAR2(30)
AOBDOPP_SURROGATE_ID	NUMBER(19)
AOBDOPP_VERSION	NUMBER(19)

Column	Datatype
AORDOPP_VPDI_CODE	VARCHAR2(6)

New Table - AORDOPP

The following table was added in order to support the Manage My Prospects functionality.

Column	Datatype
AORDOPP_PIDM	NUMBER(8)
AORDOPP_DOPP_CODE	VARCHAR2(15)
AORDOPP_DISP_SEQ_NO	NUMBER(3)
AORDOPP_PROS_PORT_IND	VARCHAR2(1)
AORDOPP_ACTIVITY_DATE	DATE
AORDOPP_USER_ID	VARCHAR2(30)
AORDOPP_DATA_ORIGIN	VARCHAR2(30)
AORDOPP_SURROGATE_ID	NUMBER(19)
AORDOPP_VERSION	NUMBER(19)
AORDOPP_VPDI_CODE	VARCHAR2(6)

New Table - ATVDOPP

The following table was added in order to support the Manage My Prospects functionality.

Column	Datatype
ATVDOPP_CODE	VARCHAR2(15)
ATVDOPP_DESC	VARCHAR2(60)
ATVDOPP_TITLE	VARCHAR2(60)
ATVDOPP_DFLT_PROS_SEQ_NO	NUMBER(3)
ATVDOPP_DISPLAY_IND	VARCHAR2(1)
ATVDOPP_DATA_ORIGIN	VARCHAR2(30)
ATVDOPP_USER_ID	VARCHAR2(30)
ATVDOPP_ACTIVITY_DATE	DATE
ATVDOPP_SURROGATE_ID	NUMBER(19)

Column	Datatype
ATVDOPP_VERSION	NUMBER(19)
ATVDOPP_VPDI_CODE	VARCHAR2(6)

Open Pledge Notification

New Column - ATVXREF

The following column was added in order to support the Open Pledge Notification functionality.

Column	Datatype
ATVXREF_ASSOC_PLEDGE_IND	VARCHAR2(1)

Multiple Solicitors for a Proposal

New Table - AMRPSOL

The following table was added in order to support the Multiple Solicitors for a Proposal functionality.

Column	Datatype
AMRPSOL_PIDM	NUMBER(8)
AMRPSOL_PROP_CODE	VARCHAR2(6)
AMRPSOL_PROP_SEQ_NO	NUMBER(3)
AMRPSOL_PROJ_CODE	VARCHAR2(6)
AMRPSOL_STAFF_IDEN_CODE	VARCHAR2(5)
AMRPSOL_STAFF_PIDM	NUMBER(8)
AMRPSOL_PRIMARY_IND	VARCHAR2(1)
AMRPSOL_ACTIVITY_DATE	DATE

Column	Datatype
AMRPSOL_USER_ID	VARCHAR2(30)
AMRPSOL_DATA_ORIGIN	VARCHAR2(30)
AMRPSOL_SURROGATE_ID	NUMBER(19)
AMRPSOL_VERSION	NUMBER(19)
AMRPSOL_VPDI_CODE	VARCHAR2(6)

Automatically Copying Pledge Associated IDs to Pledge Payments

New Column - AUBINST

The following column was added in order to support the Automatically Copying Pledge Associated IDs to Pledge Payments functionality.

Column	Datatype
AUBINST_GIFT_ASSOC_IND	VARCHAR2(1)

Miscellaneous

New Column - AOBORGN

Column	Datatype
AOBORGN_CREATE_DATE	DATE

New Column - APBCONS

Column	Datatype
APBCONS_CREATE_DATE	DATE

Resolutions

For a comprehensive and detailed list of all items resolved in this release, please refer to the supplemental problem resolutions file (`advanc80700resolutions.txt`). The information in the resolution text file is extracted directly from the Ellucian Support Center just prior to release of the product.