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Banner Advancement
Release Guide

Release 8.5.1
June 2012

Revision History

Publication Date	Summary
June 2012	New version that supports Banner Advancement 8.5.1 software.

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1 Executive Summary

As part of Ellucian's ongoing effort to continuously improve the quality of products, services and processes, Banner Advancement® 8.5.1 introduces new functionality, as described below.

iModules Encompass one-time gift

Banner Advancement 8.5.1 introduces functionality that allows you to pull One-Time Gift Transactions from Encompass to Banner. Once the applicable setup is performed, the pull process can be initiated either manually or through the Scheduler function. Once the pull is complete, the transactions can be reviewed and posted to the permanent Banner database tables using the external gift review forms – AGAWGIF and APAWPRS.

Solicitation Code (ATVSOLC) Refinements

New functionality allows you to group solicitation/appeal codes for use in reporting aggregate fundraising results. Leveraging a grouping could, for example, provide you with a method to compare year-over-year performance where the individual appeal codes are not as critical as the aggregate group. This works in the same manner that Student Activity Codes (STVACTC) leverage two separate groupings for Type and Category.

Oracle Fusion Middleware 11/WebLogic Server

Deployment of the Advancement Connector to a WebLogic server is now supported. Prior to this release, deployment of the Advancement Connector was solely supported for Oracle Application Server (OAS). This release increases the support to these two server deployment options.

2 Functional Enhancements

This section provides information on the functional enhancements in Banner® Advancement 8.5.1.

iModules Encompass one-time gift support

This release introduces functionality that supports pulling one-time gift transactions from Encompass to Banner Advancement.

Please refer to the Banner Advancement Data Load /Extract Handbook for details about setting up and performing data loads and extracts and using the Advancement Connector to transfer constituent data between Banner and Encompass.

Supported Transaction types

Banner Advancement supports pulling the following types of one-time gifts:

Fields	Descriptions
Authenticated Gifts	Authenticated gifts are one-time gifts made by a donor whose Encompass member record has a valid Banner PIDM value in the field labeled Constituent PIDM, typically found on the Admin Only tab of the member's Encompass profile.
	The standard mechanism for populating the Encompass Constituent_ID is with the PIDM value, which is provided by the Banner Advancement push to Encompass. Thus, if populated in this manner, it should always be a valid Banner PIDM.
	If an invalid PIDM value is pulled back in this attribute by gift integration, the Advancement Connector Gift Pull process will identify this as an error and it will not be allowed to be loaded into Banner.
	Each complete and valid authenticated gift is considered a candidate for mass posting via the Gift List tab of the AGAWGIF form.
Unauthenticated Gifts	Unauthenticated gifts are one-time gifts made by a donor whose Encompass member record does not have a valid Banner PIDM value in the field labeled Constituent PIDM, typically found on the Admin Only tab of the member's Encompass profile. This can occur for various reasons including the gift being made by a new donor who

Fields	Descriptions

doesn't yet have a record in Banner or when the donor doesn't sign-on when making the gift and the gift is not associated with a member record having a valid PIDM in the Constituent PIDM field.

For unauthenticated gifts, the billing information provided by the donor when making the gift (and listed below) is pulled from Encompass to Banner and can be viewed on the APAWPRS form. For these transactions, the external gift review process needs to include reviewing the external person data to either tie the incoming donor to an existing Banner ID or create a new Banner ID to which the incoming gift would be tied.

The following are the specific biographic-related elements pulled from Encompass and displayed on the APAWPRS form:

Person Information tab

- Last Name (required in Encompass)

- First Name (required in Encompass)

Address Information tab

- Phone (required in Encompass, shown in Processing Instructions field, user needs to cut & paste into appropriate phone fields)

- Street Line 1 (required in Encompass)

- Street Line 2

- City (required in Encompass)

- State (required in Encompass)

- Zip (required in Encompass)

- Nation (required in Encompass)

> **Note:** If there are multiple unauthenticated Encompass gifts in the temporary gift tables and more than one of these unauthenticated gifts is associated with the same Encompass member ID, when the first of these gifts is reviewed and associated with a Banner ID (regardless of whether this is done through the creation of a new Banner constituent or the association of this gift to an existing Banner constituent), all other unauthenticated gifts for this same Encompass member id in the temporary gift tables will be associated with this same Banner ID.

Fields	Descriptions
	The assumption is that if the first gift from this member is associated to a particular Banner ID, all other unauthenticated gifts from this same Encompass member ID sitting in the temporary gift tables should be associated with that same Banner ID. This saves the reviewer time in having to associate each of these unauthenticated gifts from this same member to the Banner ID. This will save the reviewer look-up and data entry time since the association will occur automatically.
One-time Gifts with Multiple Designations	Gift transactions entered in Encompass can be allocated to multiple designations. Banner will allow you to retrieve, review and process these transactions, per standard workflow.
One-time gifts with a single designation	For single-designation gifts, there are two Encompass set-up scenarios that are supported for the Advancement Connector Gift Integration: • The designation is set-up as an actual designation in Encompass and is passed in the normal designation node via the iModules web service. • The campaign is set-up so that the user does not have to select a designation, thus saving data entry as there is only one designation option for this campaign. Therefore, the actual designation value MUST be set-up in a particular manner in Encompass so that the Banner gift integration logic can successfully obtain the designation value. If it is not set-up in exactly this manner, the designation will not successfully be pulled from Encompass. When this campaign is created in Encompass, the set-up for this campaign must also include a Commerce Identifier = Banner Designation Code. If this Commerce Identifier is not available as a choice to your institution (using the Advance Mode when setting up the campaign), you must work with iModules to have a Commerce Identifier of 'Banner Designation Code' created and available. When available for selection, the 'Value' that you should assign for this Commerce Identifier should be the actual Banner designation code. The value of the Banner Designation Code Commerce Identifier will only be interrogated for a designation value if a designation value(s) is not found in the designation node when the iModules web service is called.

Fields	Descriptions
One-time gifts without a designation	It is technically possible for gifts to be entered in Encompass without a designation value being entered or defaulted. These one-time gifts are supported by the Advancement Connector gift integration.
	Your institution can choose to set-up a designation default (on AGACTRL) for any Encompass one-time gifts that are pulled over and are missing a designation. If this default is not set, the requirement of a valid designation value will be enforced when the user is positioned on the Gift Details tab of AGAWGIF when reviewing the pulled gift. Please see the 'One Time Gift Setup' section earlier in this document for more details regarding the identification of a default designation value.

Un-supported transaction types

Banner Advancement does not support pulling the following types of transactions:

Fields	Descriptions
Skip Billing Transactions	Encompass allows an Admin user to enter a gift on behalf of a donor. While this follows the normal donation workflow, the Admin has an additional option to "Skip" the collection of Billing information. This is occasionally done when charging the credit card is not appropriate, such as registering for an event for which payment was provided separately.
	When these one-time gift transactions are pulled from Encompass to Banner, these transactions are identified as errors as part of the Gift Processing error handling logic. Any error that meets this condition will not be accepted into Banner, thus these types of transactions should not be entered in Encompass.
Adjustment Transactions	While Encompass does allow the entry of adjustment transactions, Banner is considered the system of record. Therefore, all adjustments should be done directly in Banner, not through the Adjustment function in Encompass. The handling of Encompass Adjustment records is not supported by the Advancement Connector.
	Unfortunately, there is no method available to identify and exclude the pulling of these adjustment transactions in Gift Integration. Therefore, the only method of controlling this is for institutions to enforce the policy of no entry of Encompass Gift Adjustments.

Fields	Descriptions
All other Transactions	Gift Integration currently only supports one-time gift transactions that are successful (complete) transactions. It does not support recurring gifts with gift payments (may be referenced by some institutions as pledges and pledge payments) or any other type of transaction, including the two noted directly above.

One-time gift setup in Banner

This section describes the set-up steps necessary for pulling one-time gifts from Encompass to Banner Advancement. As part of this process, the following forms in Banner need to be examined:

- AGACTRL
- AUACMAP
- AUACDEF

Note

The 'Allow Web Pledges' and 'Allow Web Gifts' check boxes on the Base Information tab on the AFACAMP Form (Campaign Detail), are not used, as it's assumed each institution will only set up campaigns in Encompass for which it makes sense to allow the donor to make online gifts.

AGACTRL

Each gift transaction in Banner must contain a valid gift type code. As the entry of this value is not supported in Encompass, a Gift Type default must be set-up in Banner for Encompass gift transactions to successfully be pulled over to Banner. There are additional default fields that potentially require population by your institution to enable the Gift Integration to successfully function. All of these default values are now available for entry on the Connector Defaults sub-tab on the Institution tab of the AGACTRL form.

These defaults only need to be populated by institutions using the Encompass Gift Integration.

New Gift Integration fields on the AGACTRL form are defined as follows:

Fields	Descriptions
Gift Type	This field identifies the default gift type that will be associated with all gifts (authenticated and unauthenticated) being pulled from Encompass to Banner. Values in this drop-down are validated against the Gift/Payment Type Validation Form (ATVGIFT). Failure to enter a value in this field will result in an error for all gifts when the process pulls gifts from Encompass to Banner. Required
Address Type	When unauthenticated gift transactions are pulled from Encompass to Banner, this value is not available to be pulled from Encompass. Therefore, you can choose to set this default value or require the reviewer to enter this value for each unauthenticated gift on the external person form (APAWPRS). This value does not apply to authenticated gifts pulled from Encompass since new constituent records do not need to be created for those transactions. Values in this drop-down are validated against the Address Type Code Validation Form (STVATYP). **Tip:** If your institution would most likely assign the same value to most or all unauthenticated gifts pulled from Encompass, it may be most efficient to enter this

Fields	Descriptions
	default value.
	Optional
Donor Category	When unauthenticated gift transactions are pulled from Encompass to Banner, this value is not available to be pulled from Encompass. Therefore, you can choose to set this default value or require the reviewer to enter this value for each unauthenticated gift on the external person form (APAWPRS). This value does not apply to authenticated gifts pulled from Encompass since new constituent records do not need to be created for those transactions. Values in this drop-down are validated against the Donor Category Code Validation Form (ATVDONR). **Tip**: If your institution would most likely assign the same value to most or all unauthenticated gifts pulled from Encompass, it may be most efficient to enter this default value. Optional
Telephone Type	When unauthenticated gift transactions are pulled from Encompass to Banner, this value is not available to be pulled from Encompass. Therefore, you can choose to set this default value or require the reviewer to enter this value for each unauthenticated gift on the external person form (APAWPRS). This value does not apply to authenticated gifts pulled from Encompass since new constituent records do not need to be created for those transactions. Values in this drop-down are validated against the Telephone Type Validation Form (STVTELE). **Tip:** If your institution would most likely assign the same value to most or all unauthenticated gifts pulled from Encompass, it may be most efficient to enter this default value. Optional
E-Mail Type	When unauthenticated gift transactions are pulled from Encompass to Banner this value is not available to be pulled from Encompass. Therefore, you can choose to set this default value or require the reviewer to enter this value for each unauthenticated gift on the external person form (APAWPRS). This value does not apply to authenticated gifts pulled from Encompass since new constituent records do not need to be created

Fields	Descriptions
	for those transactions. Values in this drop-down are validated against the E-Mail Type Validation Form (GTVEMAL).

> **Tip:** If your institution would most likely assign the same value to most or all unauthenticated gifts pulled from Encompass, it may be most efficient to enter this default value.

Optional

Fields	Descriptions
Designation	This field identifies the default designation that will be associated with gift transactions from Encompass that do not have a designation value. This is necessary because all gifts in Banner must have a designation code but Encompass campaigns have designation as an optional field.

If you do not enter a value here and the value is not supplied by Encompass, the reviewer will have to enter the correct designation code for each of those gift transactions. This value is not utilized if the transaction contains a valid designation code.

> **Tip:** If your institution would typically use the same designation value for any Encompass gifts pulled over missing designation, it may make sense to populate this field. If the designations may vary, you may want to leave this blank to ensure the reviewer has to proactively enter the appropriate designation if none are supplied.

Optional

AUACMAP

The following changes were made to the Advancement Connector Data Mapping Form (AUACMAP) in order to support one-time gift integration:

- New Valid Profile Categories Data block

- New Data Mappings to support Gift Integration

- New Gift Integration Review Category

- New Gift Integration Profile Category

New Valid Profile Categories Data block

The AUACMAP form contains a new data block called Valid Profile Categories, which allows you to associate each data element in the Data Elements data block to the appropriate Profile Categories. As you navigate between Data Elements, the values in the Profile Categories data block change in order to reflect the associations to the Data Element in context.

📋 **Note**

> Previously, duplicate Data Elements with the same Connector Name were not allowed. With the introduction of the Profile Categories data block and the ability to indicate the profile category to which the Data Element applies, duplicate Connector Name values are now allowed, as long as they have different Profile Categories. For example, you can have two Data Elements named SPRIDEN_FIRST_NAME, one with a Profile Category of Biographic that maps to the SPRIDEN table for Biographic updates and one with a Profile Category of Gift that maps to the APBWIDN table for Gift Pulls. You may not have two Data Elements that have the same Profile Category.

The following data elements are available in the new data block:

Fields	Descriptions
Connector Name / Friendly Name	The top line displays the Connector Name and the Friendly Name of the Data Element in context in the above data block.
Category	This is the category to which the Data Element applies. Values in this drop-down are validated against ATVPFTP. This is required.
Description	Display only; provides the description associated with the selected Category value.
Active	This check box indicates whether the selected Profile Category is active for the associated Data Element. Typically this box will be checked as the record is most likely a 'seed data' record.
Push Allowed	This check box indicates whether the selected data element can be included on Push Profiles associated with this Profile Category. If the Push check box is not checked for the Data Element, you may not check the Push Allowed check box for the Profile Category. If the Push check box is checked for the Data Element, it can be checked or unchecked for the Profile Category.
Pull Allowed	This check box indicates whether the selected data element can be included on Pull Profiles associated with this Profile Category. If the Pull check box is not checked for the Data Element, you may not check the Pull Allowed check box for the Profile Category. If the Pull check box is checked for the Data Element, it can be checked or unchecked for the Profile Category.
Baseline	Display only; this is only checked if it is included in the seed data and indicates whether the Profile Category for the associated Data

Fields	Descriptions
	Element is supported as part of the Banner Advancement base product.

Add, Modify and Delete Rules

The following rules apply to the new Profile Categories data block:

Action	Rule
Add	You can add a new Profile Category record at your discretion. However, it must have a unique Profile Category value; duplicates category values are not allowed.
	Note: If the baseline indicator is not checked on the Valid Profile Category record for a data element, this is not an integration type that is supported by the Banner Advancement Connector. Therefore, any desire you have to extend the Advancement Connector to support this data element for the indicated Profile Category type would be a customization you own and maintain.
Modify	You can modify a record. However, the record after the changes must not violate any constraints, such as creating a duplicate profile category value, and must be a valid value.
Delete	Baseline records can not be deleted. If desired, you can inactivate a Profile Category by un-checking the Active check box." Non-baseline records can be deleted. However, performing this action will not impact any existing profiles of this Profile Category that contain this data element.

Additional Business Logic Checks

The following information is meant to assist in the addition or modification to existing records.

- Each Profile Category record must have, at the minimum, the Push Allowed or Pull Allowed check box checked. You will receive an error and will not be able to save any profile records if this condition is not met.

- If the Data Element in the top data block has the Active indicator un-checked, a new Profile Category record cannot be associated with that data element. If this is attempted and you try to save this record, you will receive an error. This is because that data element is not considered active so it should not allow or require any new associations to Profile Categories.

- If a Data Element is active, it can be assigned a new Profile Category (via an Add in the Valid Profile Categories data block). However, this Profile Category record is only allowed to have the Push or Pull check box checked if the corresponding check box is checked for the Data Element in the top data block. If you attempt to check one of these Push or Pull check boxes for a Profile Category Record when the associated data element does not have the same check box checked, an error will appear and indicate 'Push or Pull can only be allowed if it is allowed for the associated Data Element'.

- If your institution inactivates a data element in the top data block of AUACMAP, please be aware that this does not have an impact on any existing profiles that already contain this data element. It only prevents that 'inactive' data element from being assigned to a profile moving forward. You can, at your discretion, manually delete the data element from any existing profiles if the data element is considered no longer valid from an institutional perspective.

Upgrade Considerations - Seed Data

Seed data is provided for each data element in the base product.

- For each data element supported for the existing BIOGRAPHIC integration, a BIOGRAPHIC Profile Category record is automatically installed when you install Banner Advancement, and these records will have the Baseline check box checked.

- For each data element supported for the new GIFT integration, a GIFT Profile Category record is automatically installed when you install Banner Advancement, and these records will have the Baseline, Active and Pull Allowed check boxes checked.

- If your institution had defined any non-baseline data elements prior to your update to this release, the upgrade routine will automatically assign a BIOGRAPHIC Profile Category record to that data element.

New Data Mappings for Gift Integration

The master list of Data Elements has been expanded to include Gift-Related data elements that are supported for Gift Integration. These Data Elements are all included as seed data and installed for you during the Banner Advancement installation process.

By default, all new Data Elements listed below will have the Active, Baseline and Pull Allowed check boxes checked, and the Push Allowed check box unchecked.

Connector Name	Friendly Name	Review Category	Banner Table Name	Banner Column Name (for temporary gift tables)
spriden_first_name	First Name	GIFT	APBWIDN	APBWIDN_FIRST_NAME
spriden_last_name	Last Name	GIFT	APBWIDN	APBWIDN_LAST_NAME
goremal_email_address_pref	Email	GIFT	APBWIDN	APBWIDN_EMAIL_ADDRESS
Class Code 1 - CUSTOMIZATION REQUIRED	Class Code 1	GIFT	AGBGHLD	AGBGHLD_GCLS_CODE
Class Code 2- CUSTOMIZATION REQUIRED	Class Code 2	GIFT	AGBGHLD	AGBGHLD_GCLS_CODE_2
Class Code 3- CUSTOMIZATION REQUIRED	Class Code 3	GIFT	AGBGHLD	AGBGHLD_GCLS_CODE_3
Comment- CUSTOMIZATION REQUIRED	Comment	GIFT	AGBGHLD	AGBGHLD_COMMENT
Processing Instructions- CUSTOMIZATION REQUIRED	Processing Instructions	GIFT	AGBGHLD	AGBGHLD_PROC_INSTR
Matching Gift Company- CUSTOMIZATION REQUIRED	Matching Gift Company	GIFT	AGBGHLD	AGBGHLD_PROC_INSTR

More specific information regarding these data elements and their use on Gift Pull Profiles is provided in subsequent sections.

New Gift Integration Review Category

A new Review Category is now available on the Advancement Connector Review Category Validation Form (ATVRCAT). This new seed data record contains a Code = GIFT and a Description = Gift Integration.

When you access the AUACMAP form, this value appears in the Review Category field when you select a Data Element to which the category applies.

New Gift Integration Profile Category

A new Profile Category is now available on the Advancement Connector Profile Category Validation Form (ATVPFTP). This new seed data record contains a Profile Category = GIFT and a Description = Gift Integration.

When you access the AUACMAP form, this value appears in the Category field in the new Valid Profile Categories datablock when you select a Data Element to which the category applies.

 Note

> For additional information on the fields in this block as well as pertinent information on Adding, Modifying or Deleting values and upgrade considerations, please refer to the section of this document entitled New Valid Profile Categories Data block on page 15.

AUACDEF

The following changes were made to the Advancement Connector Profile Form (AUACDEF) in order to support one-time gift integration:

- New Profile Categories Code Field
- New Campaign Code and Control ID Fields
- New Gift Integration Pull Profile

New Profile Categories Code

The AUACDEF form includes a new Category Code field, which allows you to associate a connector profile with a Category Code (GIFT, BIOGRAPHIC). This field is required. Values in this drop-down are validated against the Connector Profile Category Validation Form (ATVPFTP).

Upgrade Considerations - Seed Data

When you upgrade to this release of Banner Advancement, the upgrade will automatically populate this field for any existing profiles, including the BANNER PUSH and BANNER PULL seed profiles. Thus, when you view this form for the first time after the upgrade, the appropriate Profile Category value (BIOGRAPHIC) will appear and no additional setup is necessary for any existing Biographic profiles.

Copying a Profile

In conjunction with the introduction of the new Category Code field in the key block, when you indicate you want to copy an existing profile via the Copy Profile Code drop-down, the list of profiles from which you can copy will be limited to those that have both a matching Transaction Type (pull/push) and a matching Category Code (bio, gift). Only those profiles with matching values for both fields are displayed as options in the Copy Profile Code drop-down.

New Campaign Code and Control ID Fields for Gift Category Code

The AUACDEF form includes two new fields that are required if the Category Code is GIFT. They are Campaign Code (Banner Code) and Control ID.

Fields	Descriptions
Campaign	Each gift pull profile must be tied to a specific (Banner) Campaign Code. To support this functionality, a new Campaign field is available on the key block on AUACDEF. Values in this drop-down are validated against the Campaign List Form (AFCCAMP).
	Since this field is unique to Gift Profiles, it only appears when a Profile Code that's associated with a gift profile, as indicated in the Profile Categories data block on AUACMAP, is specified. This field does not appear when a non-gift profile is selected.
	Once a gift profile record is added with a Campaign code, the Campaign code can be edited. However, a value must always be provided and the field cannot be blanked out.
Control ID	Each gift pull profile must be tied to a specific Encompass Campaign Control ID. This is the numeric portion of the ID value shown in Encompass on the Manage Campaigns tab (i.e. 899, 500, etc.). This value is used in the web service request to identify the Encompass campaign for which gifts are being requested. Therefore, it is critical that the institution enter the correct value. To support this need, a new Control ID field is available on the key block on AUACDEF.
	Since this field is unique to Gift Profiles, it only appears when a Profile Code that's associated with a gift profile, as indicated in the Profile Categories data block on AUACMAP, is specified. This field does not appear when a non-gift profile is selected.
	Once a gift profile record is added with a Control ID, the Control ID can be edited. However, a value must always be provided and the field cannot be blanked out.

As noted in the previous chart, these new fields are maintainable on a Gift Integration Profile. This allows you to modify the Control ID or Campaign of an existing profile, if necessary. Other key fields cannot be modified. If other values are incorrect, delete the profile and add it with the appropriate values. This form does support the establishing of multiple campaigns in Encompass and mapping them to the same Banner Advancement campaign. The set-up for this would include multiple Campaign (gift) Profiles in Banner Advancement, which have the same Campaign value and different Control ID values.

New Gift Integration Pull Profile

Gift Integration requires a new Pull Profile. Therefore a new BANNER GIFT PULL profile is provided as seed data as part of this release. However, it is important to note that the profile needed to support the Gift Pulls has a few key differences from the Biographic profiles and can not be used successfully without some modification.

The first difference is that there are additional data elements in the keyblock on the Advancement Connector Profile form (AUACDEF) that are required for Gift profiles. This is spoken to in the section above.

The second difference is the functional purpose of the BANNER GIFT PULL profile. Since a Gift transaction has a more rigid set of fields returned from Encompass, the BANNER GIFT PULL profile only needs to include fields that are not included in the standard Gift Transaction.

The following describes the actual BANNER GIFT PULL profile provided as part of this release:

Key block data values

The following key block values are associated with the new BANNER GIFT PULL profile:

- Profile Code = BANNER GIFT PULL

- Profile Description = Baseline Gift Pull Profile

- Category Code = GIFT

- Transaction Type = PULL

- Campaign = Update Me

- Control ID = 99999

⚠️ **Warning**

> The default Campaign code, UPDATE ME, must be configured to represent a
> Campaign code unique to your institution. Failure to do so will result in an error on
> AUAINIT that indicates the value must be updated here on AUACDEF. To change
> this value, make a copy of the BANNER GIFT PULL profile and then modify the
> UPDATE ME value while current on the copied BANNER GIFT PULL profile. Copying
> the profile before modifying it preserves the original BANNER GIFT PULL seed data
> and allows you to refer back to it, if necessary.

Data block values

The fields that are required for a valid Gift Pull profile, and are included in the BANNER GIFT
PULL PROFILE include:

Name	Connector Name	Display Order
First Name	SPRIDEN_FIRST_NAME	1
Last Name	SPRIDEN_LAST_NAME	2
Email Address	GOREMAL_EMAIL_ADDRESS_PREF	3

Optional Data block values

Optionally, Gift Integration will support the pulling of six additional 'instance' fields for a campaign.
These are optional fields and are not required to be used by institutions. In fact, these mappings are
invalid and will not work as delivered. This is because the value entered in the 'Connector Name'
column does not map to an actual instance field in Encompass as instance field names (Connector
Name) are unique to each institution and to each of their campaigns. These seed data values are
provided as placeholders to remind institutions that these particular instance fields are supported for
the BANNER GIFT PULL profile if desired.

When configuring a Gift Pull Profile for use at your institution, copy the provided BANNER GIFT PULL profile and name it something more meaningful to your institution. You should then delete these predelivered six instance fields and add any unique instance names that you have set-up and are associating with this campaign/Gift Pull profile. Please see the steps discussed in the .

Name	Connector Name	Display Order
Matching Gift Company	`MATCHING GIFT COMPANY - CUSTOMIZATION REQUIRED`	4
Class 1, Class 2, Class 3	`CLASS CODE 1 - CUSTOMIZATION REQUIRED`	5
	`CLASS CODE 2 - CUSTOMIZATION REQUIRED`	6
	`CLASS CODE 3 - CUSTOMIZATION REQUIRED`	7
Comment	`COMMENT - CUSTOMIZATION REQUIRED`	8
Processing Instructions	`PROCESSING INSTRUCTIONS - CUSTOMIZATION REQUIRED`	9

The following provides additional information regarding the optional six instance fields:

Name	Encompass Source	Banner Target
Matching Gift Company	Encompass provides a field called Matching Gift Company. This field allows the donor to provide the name of a company that will match the gift.	If a donor provides this information, the pull process will include this information in the Processing Instructions field along with a label that indicates it is the Matching Gift Company Name. As with other gifts that include Processing Information, the Matching Gift Company information will display on the Gift Details tab of AGAWGIF so that the reviewer can see this additional information and use it to accurately update and post the gift.

Name	Encompass Source	Banner Target
Class Code 1	Configured as an instance field with a drop-down list on the appropriate Campaign(s) in Encompass. The valid codes should correspond to the valid Class Codes identified in Banner.	Gift Integration supports the same fields that are available for In-Honor and In-Memory, which are supported by Banner Advancement and Banner Advancement Self-Service. These include Class 1, Class 2 and Class 3.
Class Code 2	Configured as an instance field with a drop-down list on the appropriate Campaign(s) in Encompass. The valid codes should correspond to the valid Class Codes identified in Banner.	See above comments.
Class Code 3	Configured as an instance field with a drop-down list on the appropriate Campaign(s) in Encompass. The valid codes should correspond to the valid Class Codes identified in Banner.	See above comments.
Comment	Configured as an instance field (text) on the appropriate Campaign(s) in Encompass.	This is a general Comment field that is mapped to the Comment field on the AGAWGIF form. This is similar to the general comment field provided in Banner Advancement Self-Service. **Warning:** Depending on the method you use to add this instance field to your Encompass environment, the value inserted in this field might exceed 300 characters in length. However, when this value is pulled to Banner, the maximum limit is 300 characters. Thus, any Comment value that exceeds 300 characters will be truncated when the value is inserted into Banner for viewing on the Gift Details tab of AGAWGIF or on the standard forms used to view posted gifts. No error or warning will be

Name	Encompass Source	Banner Target
		displayed in Banner indicating the value was truncated. If Comments are truncated as part of this process, and you wish to determine what information was truncated, the balance of the information can be ascertained via Campaign Reporting in Encompass.
Processing Instructions	Configured as an instance field (text) on the appropriate Campaign(s) in Encompass. This field is designed to allow the donor to provide guidance regarding the intended use of their donation or additional processing instructions. This may be, for example, instructions indication the gift is an In-Honor or In-Memory gift.	This field is available on the Details Tab of the Banner external gift review form (AGAWGIF) to help the gift reviewer ensure the gift is posted appropriately. The Processing Instructions information is stored in a temporary table, not in a permanent Banner table. These are simply temporary instructions that aim to help ensure the gift itself is processed correctly in Banner. If a gift pulled from Encompass has a value in the Processing Instructions field, the gift will automatically have the Review check box checked, indicating it requires review. This will prevent the gift from being mass posted. When this occurs, the gift will need to be posted from the Gift Details Tab on the AGAWGIF form. This method ensures the gift entry operator has viewed the Donor Instructions text prior to processing the gift. **Warning:** Depending on the method you use to add this instance field to your Encompass environment, the value inserted in this field might exceed 2000 characters in length. However, when this value is pulled to

Name	Encompass Source	Banner Target
		Banner, the maximum limit is 2000 characters. Thus, any Processing Instructions value that exceeds 2000 characters will be truncated when the value is inserted into Banner for viewing on the Gift Details tab of AGAWGIF or on the standard forms used to view posted gifts. No error or warning will be displayed in Banner indicating the value was truncated. If Processing Instructions are truncated as part of this process, and you wish to determine what information was truncated, the balance of the information can be ascertained via Campaign Reporting in Encompass.

Setting up Designations in Encompass

When defining a Designation in Encompass, the Designation IDs functionality is used to tie an Encompass Designation to a Banner Designation code. To facilitate this, there must be a value of 'Banner Designation Code' that can be selected from the Designation IDs drop-down option. For any designations that can potentially be on a one-time gift that is pulled over to Banner, institutional personnel must then select that 'Banner Designation Code' drop-down for the Designation IDs field, enter the actual Banner designation code as the Value for that Designation ID and Save.

If this is not done or there is a type-o in either the Designation ID or the Value, gift integration will not be able to successful identify the appropriate designation code. Instead, an error will display when this gift is reviewed on the AGAWGIF form and the user will be required to enter the appropriate valid Banner designation code.

Setting up instance fields In Encompass

As noted earlier in this Release Guide, if you want to include any of the six supported instance fields for any of your campaigns, certain set-up steps are required. The following describes these steps.

1. Identification of instance fields in Encompass for appropriate campaigns.

    When adding a new field to a campaign form in Encompass, the check box labeled 'Make this an instance field' must be checked. If this is not checked, then the gift integration for this field will not function properly and is not supported. The value that is entered in the 'Export Column Header' field in Encompass will also be the unique Connector Name that you will be using in Step 2a below. Please make note of this value. Please work with iModules directly if you require any assistance in understanding how to setup an instance field on a campaign.

    For example: For your Annual Fund campaign, you would like to include the Processing Instructions field. Therefore, you add it as an instance field for that campaign with an 'Export Column Header' name of '2012 Annual Fund:Processing Instructions'.

2. Identification of these instance fields on the AUACMAP form

    Since instance names in Encompass are unique by institution and by campaign, your institution must identify this unique name to Banner so it will understand the appropriate column to interrogate when trying to pull over this value for a particular Gift Pull Profile (and campaign). The following two steps are required:

    a. Insert a new Data Elements record in the top data block on the AUACMAP form.

        Since your institution has a new 'instance' field that isn't yet known to Banner, the first step is to identify this data element to the master list of data elements supported for the Advancement Connector. This is done on the AUACMAP form using the Record Insert action.

        To make this easier, the BANNER GIFT PULL profile has a seed data record for each of the six instance fields supported for Gift Integration. All of these can easily be found by

filtering the view on AUACMAP to include only those that have a Connector Name containing the word 'Customization'.

If you view these existing seed data records, it provides the majority of the values you would need for your 'instance' record. The only piece of information that will vary by institution is the Connector Name value. This should be equal to the value you have for this instance field in Encompass in the 'Export Column Header' attribute.

For example: To identify the Processing Instructions instance field that I added to my Annual Fund campaign in Encompass, I would insert a new record that had the same data as the seed data record with the Connector Name 'PROCESSING INSTRUCTIONS - CUSTOMIZATION REQUIRED'. Instead of the above connector name, for my new record, the value would instead be '2012 Annual Fund:Processing Instructions' which is the exact value from the 'Export Column Header' attribute of the Encompass instance field.

Label Customization for Processing Instructions

Both the Processing Instructions and the Matching Gift Data are mapped to the AGBGHLD_PROC_INSTR table and column. Therefore, a label will display in front of each value so the user can easily understand the data they are viewing in that one field. The label that will be displayed in the Processing Instructions field on AGAWGIF (Gift Details tab) is defined by the value in the Friendly Name field on AUACMAP for these two records. Institutions have the option of modifying the text in the Friendly Name field for these records to customize those labels if desired. The order in which these two fields display in the Processing Instructions field (assuming both values are being populated and pulled over with Gifts) is dictated by the Display Order value for the data element on AUACMAP and can be modified by the institution of a different order is desired.

b. Associate this new data element to the Gift Category on the bottom data block entitled 'Valid Profile Categories'.

Once you've added the new mapping for this instance field for this particular campaign, you then need to assign it the Gift Category in the Valid Profile Categories datablock at the bottom of this form. It should be marked as active and have the 'Pull Allowed' check box checked. This now makes this data element available to be added to any Gift Pull profile.

3. Add this data element to the appropriate Gift Pull Profile on the AUACDEF form

You can now add this campaign-specific instance field to the appropriate Gift Profile being used for that campaign.

Given that the 'Export Column Header' value is required by Encompass to be unique across all campaigns, you will need to do the above steps for every one of these supported instance fields you choose to include on every campaign. So, as an example, if you only wanted to add the Processing Instructions form to your campaigns and pull that one 'instance' field over to Banner but you had six campaigns, you'd need to add six unique data element records to AUACMAP and then add them to the appropriate six Gift Pull Profiles per the instructions above.

One-time gift initiation

This section describes initiating the pulling of one-time gifts from Encompass to Banner Advancement after the initial setup is performed. As part of this process, the following forms in Banner need to be examined:

- AUAINIT (Initiation tab, Scheduler tab and Run History tab)

AUAINIT – Initiation tab

Since there are now two kinds of integration (Biographic and Gift), a new Category Code field was added to the initiation tab on the Advancement Connector Initiation Form (AUAINIT). When you select a Category from this drop-down, values in the Profile Code list below will be filtered and will only display profiles associated with the selected category in this field.

- If Initiation Selection = Push, and Category Code = Biographic, only the Biographic push profiles display.

- If Initiation Selection = Push and Category Code = Gift, no profiles display as none are supported by Ellucian at this time. However, if your institution has customized the Advancement Connector and has, for some reason created Gift Push profile(s), they would display.

- If Initiation Selection = Pull and Category Code = Biographic, only the Biographic Pull profiles display.

- If Initiation Selection = Pull and Category Code = Gift, only the Gift Pull profiles display.

AUAINIT – Scheduler tab

Since there are now two kinds of integration (Biographic and Gift), a new Category Code field was added to the Scheduler tab on the Advancement Connector Initiation Form (AUAINIT). When you select a Category from this drop-down, values in the Profile Code list below will be filtered and will only display profiles associated with the selected category in this field.

- If Initiation Selection = Push, and Category Code = Biographic, only the Biographic push profiles display.

- If Initiation Selection = Push and Category Code = Gift, no profiles display as none are supported by Ellucian at this time. However, if your institution has customized the Advancement Connector and has, for some reason created Gift Push profile(s), they would display.

- If Initiation Selection = Pull and Category Code = Biographic, only the Biographic Pull profiles display.

- If Initiation Selection = Pull and Category Code = Gift, only the Gift Pull profiles display.

AUAINIT – Run History tab

Since there are now two kinds of integration (Biographic and Gift), the following changes were made to the Run History tab on the Advancement Connector Initiation Form (AUAINIT) in order to support one-time gift integration.

Profile Category

A new Category Code field was added to help the user understand the type of profile that was run (Gift, Biographic).

Constituent Count label change

Since there are now different types of integrations, the 'Constituent Count' label in both the Initiation Requests and the Associated Batches data blocks, were changed to 'Count'. For biographic integration, this count continues to represent the number of constituents having updates in that particular Push or Pull Request. For Gift Pull profiles, this count represents the number of gifts pulled back as part of that Request ID. This would include all one-time gift transactions returned by Encompass for that Gift pull request, regardless of whether the Banner gift integration logic subsequently identified error conditions and reports any of these gifts as errors.

Status values for Gift Pulls

When a gift pull is requested and the pull is executed successfully, the status on the Run History form will be one of the following. In most cases the status will be Completed or Completed with Errors:

Fields	Descriptions
Completed	All gift records included in the pull were successfully loaded into the external gift tables (APBWIDN, AGBGHLD and AGRGHDE)
Completed with Errors	There was at least one gift record that could not be loaded because it did not pass the validation logic. This may be due to an error identified by Encompass or the Banner pull logic. See the section below entitled 'Gift error display' for additional information.
Initiated	The pull request is in-process.
No Changes	There were no new gifts that qualified for inclusion in the pull.
Failed	There was a larger system or service failure that caused the entire pull request to fail. As a result, no gift records were pulled over.

📓 **Note**

> You might momentarily notice a gift pull contains a status of 'Review'. If this occurs, this temporary status can be ignored as it simply indicates the request is being processed.

⚠️ **Warning**

> Since the review of pulled gifts does not occur on the Connector review form, the updating of the status from Review to Completed does not apply. Once the pull is completed successfully, you must use the Review External Gifts Form (AGAWGIF) to review these pulled gifts.

Gift error display

When a pull results in a status of Complete with Errors, additional information can be viewed in order to understand the gifts that were identified as having errors. This error information can be viewed by selecting the Response Summary icon on the Run History tab in the Associated Batches data block where the batch level information is displayed. When the Response Summary is displayed, you will see three counts at the top, followed by any error information. The three counts at the top include the number of Total Constituents, Authenticated Gifts and Unauthenticated Gifts.
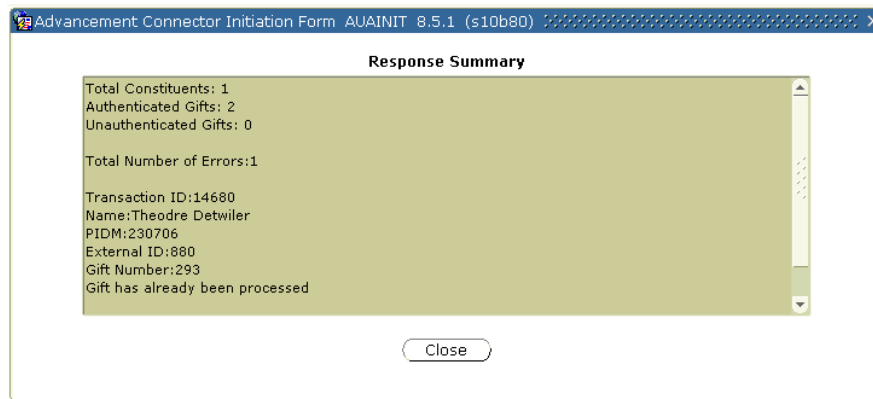
Additional information in the Response Summary for each individual error includes the following:

Fields	Descriptions
Total Constituents	This value indicates how many constituents had gifts in this pull.
	Note: This count reflects constituents for all gifts returned by the Encompass web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Authenticated Gifts	This value provides a count of all gifts pulled for this Request ID, which had a Banner PIDM in the Constituent ID data element provided by Encompass.
	Note: This count reflects all gifts returned by the Encompass web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Unauthenticated Gifts	This value provides a count of all gifts pulled for this Request ID, which did not have a Banner PIDM in the Constituent ID data element

Fields	Descriptions
	provided by Encompass.
	Note: This count reflects all gifts returned by the iModules web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Total Number of Errors	The total count of errors identified by Banner logic for the gifts provided by the Encompass web service for this Pull Request ID. If one gift has more than a single error, all errors will be included in this total.
	For example: Gift X has 2 errors. This would be counted as 2 in the 'Total Number of Errors' count and two separate sets of error information would be provided for that gift in the error detail provided at the bottom of the Response Summary.
Transaction ID	This is the unique Banner push/pull Request ID, as provided by Encompass.
Name	This is name pulled from Encompass. The format is First Name, followed by a space, then Last Name.
PIDM	If available, this is the PIDM associated with the erroneous gift (provided in the constituent ID data element in the Encompass Transaction Query).
External ID	This is the Encompass Member ID of the donor, as provided by Encompass.
Gift Number	This is the unique Gift ID, as provided by Encompass.
Error Message	This text indicates what scenario caused the gift to be rejected. For a list of possible errors, please refer to the section of this document entitled Error Identification Logic on page 39.

Email notification for successful gift pulls

When a scheduled gift integration pull is successful, an email will be sent to the designated recipient. As with the Bio push/pull process, the message will contain a standard set of information (Request

ID, Type, Date Run, Status, Profile Code and Frequency). Additionally, the message will include the following gift-specific information.

Fields	Descriptions
Total Constituents	This value indicates how many constituents had gifts in this pull. **Note:** This count reflects constituents for all gifts returned by the Encompass web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Authenticated Gifts	This value provides a count of all gifts pulled for this Request ID, which had a Banner PIDM in the Constituent ID data element provided by Encompass. **Note:** This count reflects all gifts returned by the Encompass web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.
Unauthenticated Gifts	This value provides a count of all gifts pulled for this Request ID, which did not have a Banner PIDM in the Constituent ID data element provided by Encompass. **Note:** This count reflects all gifts returned by the iModules web service for this pull request. This would include any gifts identified as having errors by the Banner pull logic and ultimately are not loaded into the Banner temporary gift tables.

Email notification for Gift Pulls with a Complete with Error Status

When a pull results in a status of Complete with Errors, additional information will be included in the email notification. This information is meant to assist in identifying which gifts had errors and were not pulled over to Banner.

The additional information that displays in the email includes a count of gift transaction errors along with the same information that displays on the Response Summary, as described earlier.

Error Identification Logic

When pulling one-time gifts from Encompass, Banner Advancement performs certain checks prior to loading the gift transactions for review. If certain error conditions exist, the gift transactions are not loaded into the gift temporary tables (APBWIDN, AGBGHLD and AGRGHDE). Instead, the transactions appear on the gift error display, as described in the section of this document entitled Gift error display on page 36.

If a single gift transaction has more than one error, each individual error will be a part of the error count shown on the Response Summary on the Run History tab and the error information for each particular error will be reported separately. For example, if the gift pull contained 1 gift that was authenticated and the gift contained 3 errors, the Total Number of Errors would be 3 and all errors will have the same gift number.

The following errors were added in order to support one-time gift transactions:

Error Message	Description
ID does not exist in Banner or Name information is missing	The gift transaction has neither a valid PIDM nor a Last Name value. To be loaded into the temporary gift tables, either: • A valid PIDM must exist, which indicates an authenticated gift. OR • Last Name must be populated to provide enough information for an unauthenticated gift.
Gift has already been processed	The gift transaction has already been posted to Banner. As part of this process, the following fields are examined to determine if the gift has been posted from this source, for this Banner ID. These fields are checked for both gifts posted into Banner as well as the other gifts currently in the temporary gift tables: • External Gift Number • Banner ID • Data Origin • Gift Date
Missing Total Gift Amount	The gift transaction is missing a value for the total gift amount.
Missing Detail Amount	The gift is missing an amount value for a designation.
Missing Gift Type Code– Please set-up default on AGACTRL	The gift type code is missing. For gifts from Encompass, this is a reminder to the institution to fill in the Gift Type code on AGACTRL. If this error is encountered, the appropriate Gift Type

Error Message	Description
	Code should be entered on AGACTRL. Once the value is specified and the user tries the Gift pull again, this error will no longer appear.
Invalid Gift Type Code – Please check default value on AGACTRL	This error would only occur if the default gift type value set-up on AGACTRL has become invalid for some reason.
Skip Billing Transactions Not Supported	The transaction does not include Billing Information and represents a 'Skip Billing' transaction entered by an Admin in Encompass, which is not supported. For additional information, please refer to the section of this document entitled <u>Un-supported transaction types on page 10</u>.
Invalid Gift Class Code 1	Indicates that the value pulled from Encompass for the Gift Class Code 1 does not have a corresponding valid value in Banner. To resolve this issue, review the valid values for this field in both Encompass and Banner to make sure they are in-synch. Once the issue is resolve, pull this gift again and the error should not appear.
Invalid Gift Class Code 2	Same description as Invalid Gift Class Code 1, but for Class Code 2.
Invalid Gift Class Code 3	Same description as Invalid Gift Class Code 1, but for Class Code 3.
State Code does not exist	Indicates the value pulled from Encompass for the State Code for an unauthenticated gift does not have a corresponding valid value in Banner. To resolve this issue, review the valid values for this field in both Encompass and Banner to make sure they are in-synch. Once the issue is resolved, pull this gift again and the error should not appear.
Nation Code does not exist	Indicates the value pulled from Encompass for the Nation Code for an unauthenticated gift does not have a corresponding valid value in Banner. To resolve this issue, review the valid values for this field in both Encompass and Banner to make sure they were in-synch. Once the issue is resolved, pull this gift again and the error should not appear.

Merge Gift Pull Timeline Considerations

The iModules gift-related web services are structured so they only provide gifts to Banner after any necessary review has been performed on a gift transaction (primarily for member-merge types of functionality). iModules has worked out a method to ensure this is transparent to those using the gift-related web services so the user does not have to do any special processing other than performing their normal hourly, daily or weekly gift pulls. However, please be aware that this potentially will result in a delay before certain gifts may be available to be pulled over to Banner. Please be sure your institution works with iModules personnel to understand any impact this may have on the delay of gifts being available for the Banner Advancement Connector Gift Integration.

Gift Review functionality

As with other external gifts that are loaded into Banner Advancement, the Gifts pulled from Encompass will be reviewed & processed using the Review External Gifts forms – AGAWGIF and APAWPRS. The following speaks only to additional enhancements done to these forms to allow reviewing of the Encompass gifts.

Viewing Processing Instructions

Any processing instructions that the donor provides in Encompass will display in a new Processing instructions field, which is visible on the Gift Details tab in AGAWGIF. Information in this field is inquiry-only.

As shown in the graphic below, when you access this field, instructions appear in the lower-left indicating this field contains "Additional Processing Instructions from the donor to help ensure this gift is posted per the donor's wishes."

Modifying the Gift Type value

Previously, the value in the Gift Type field couldn't be modified. In conjunction with the new one-time gift review functionality, the value in the Gift Type field can be modified. If a value isn't provided, an error will occur as in previous releases, as this value is required.

When you access the Gift Type field to modify the value, the field will display a new drop-down, which validates against ATVGIFT. This is the same fashion in which the Gift Type field appears on the AGAGIFT form.

Handling gifts with no Designation

Previously, the designation value on AGAWGIF couldn't be modified. Effective with this release, if a gift is pulled from Encompass and contains no designation, Banner will not allow you to save or post the gift. When this situation occurs, you must enter a Designation and it must be one that is valid for the Campaign.

Note

If you attempt to check the 'OK to Load' check box and the Designation value is missing, you will receive an error that indicates the Designation value is required to create gifts. Under these circumstances you will be allowed to save any changes on the Gift Details tab. However, you will not be allowed to check the 'OK to Load' check box while this error condition exists.

Viewing Processing Instructions for Billing Phone

When billing information is pulled for unauthenticated gifts, the billing phone information from Encompass is passed to Banner as a text field. This information can be viewed on the APAWPRS form in a new inquiry-only field named Processing Instructions. The telephone number that appears in this field will contain a prefix of Billing Phone: and will be followed by the actual number.

![Note icon] **Note**

> This data is only stored in APBWIDN. It is not stored in any of the permanent bio or gift tables since it is used to facilitate the communication of this data from Encompass to inform the user of the need to transcribe the number into the appropriate phone fields.

![Warning icon] **Warning**

> If you choose the **Create Constituent** option and there is data in the Processing Instructions field, but there is no data in the apbwidn_phone_number field, a warning message will indicate the Processing Instructions contains data but no phone number value has been entered. This message aims to help ensure you don't inadvertently miss the opportunity to transcribe phone information into the phone fields.

Display of Encompass Data on AGAWGIF

The following provides a listing of the various data elements that can be seen on the AGAWGIF and APAWPRS forms and indicates how and if they are supported for the Advancement Connector Gift Integration.

AGAWGIF – Gift Details tab

Anywhere that it says 'Not Supported' is simply an indication the data element is not pulled over from Encompass via the Gift Integration. Any exiting functionality tied to that data element on the External Gift forms continues to apply.

Field Label	Gift Integration Support	Configuration Requirements
External ID	Provided by iModules in the gift web service response. Represents the unique id of the member in Encompass (member id).	None
Banner ID	Provided by iModules in the gift web service response if available. If provided and the Banner ID is valid, this indicates an authenticated gift. This field will be blank for unauthenticated gifts.	None
OK to Load	This is used by standard external gift review functionality and its purpose or use has not changed.	None
Gift Number	This unique Banner Gift Number value is assigned by Banner, per standard external gift processing.	None
Gift Type	This is not provided by Encompass. Instead this value is populated based on the default Gift Type identified on AGACTRL.	AGACTRL Please refer to the section of this document entitled One-time gift setup in Banner on page 11.
Date	Provided by iModules in the web service response. Represents the date the gift was made by the donor.	None
Amount	Provided by iModules in the web service response.	None

Field Label	Gift Integration Support	Configuration Requirements
	Represents the total gift amount.	
Fiscal Year	This gets populated with the ATVFISC_CODE where the gift_date is between the atvfisc_start_date and the atvfisc_end_date	None
Entry Date	This is populated by Banner with the sysdate (system date).	None
Vehicle	Not supported	None
Match Form	Not supported	None
Category	• For an authenticated gift, this value is the Donot Category value associated with the Banner ID. • For an unauthenticated gift, if a default value for Donor Category has been entered on AGACTRL, that value will default when the gift is loaded into the temporary gift tables. • Donor Category will get updated on the AGAWGIF form (agbghld table) if a change is made on the APAWPRS form (apbwidn table).	AGACTRL Please refer to the section of this document entitled One-time gift setup in Banner on page 11.
Class 1	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field. Please refer to the section of this document entitled Setting up instance fields In Encompass on page 30.
Class 2	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field. Please refer to the section of this document entitled Setting up instance fields In Encompass on page

Field Label	Gift Integration Support	Configuration Requirements
		30.
Class 3	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field. Please refer to the section of this document entitled Setting up instance fields In Encompass on page 30.
Authorization	Provided by iModules in the web service response	None
Reference	Not supported	None
Comment	Supported for Gift Integration via specific use and configuration of an Encompass instance field.	Instance field. Please refer to the section of this document entitled Setting up instance fields In Encompass on page 30.
Processing Instructions	Supported for Gift Integration via specific use and configuration of an Encompass instance field. This field will potentially contain information for two Encompass fields – Processing Instructions and Matching Gift Company.	Instance field. Please refer to the section of this document entitled Setting up instance fields In Encompass on page 30.
External Gift ID	Provided by iModules in the web service response. Represents the unique external gift ID assigned by Encompass.	None
User	The user responsible for pulling this gift over to the Banner temporary gift tables for review. If done	None

Field Label	Gift Integration Support	Configuration Requirements
	manually, this will reflect the user initiating the pull. If done by the scheduler, this will have the value ADVCONN.	
Origin	For gifts pulled from Encompass through the Advancement Connector, the Origin value will always equal AUKEXGF. This is set by Banner logic.	None
Activity Date	The date this record was last updated. This is intially set to the date and time the temporary gift records are created in Banner.	None
Solicitor Information	iModules Gift Integration does not support the pulling of the Solicitation, Organization or ID fields from Encompass. However, per current functionality, when reviewing a gift the user is able to make modifications to these fields on the Gift Details tab if desired.	N/A

Campaign and Designation Details

Field Label	Gift Integration Support	Configuration Requirements
Gift Amount	Provided by iModules in the web service response . Represents the individual amounts for each designation.	None
Pledge	Not supported	N/A
Campaign	This is set to the Campaign value on the Gift Pull Profile used to pull over this gift.	Gift Pull Profile set-up on the AUACDEF the form.
Designation	Provided by iModules in the web service response. Represent the individual designation(s) for the gift.	Instance field. Please refer to the section of this document entitled Setting up instance fields In Encompass on page 30.

APAWPRS – Person Information tab

Field Label	Gift Integration Support	Configuration Requirements
External ID	Provided by iModules in the gift web service response. Represents the unique id of the member in Encompass (member id).	None
Processed	Unchanged standard Banner functionality	N/A
Generate ID	Unchanged standard Banner functionality	N/A
Banner ID	Provided by iModules in the gift web service response if available. If provided and the Banner ID is valid, this indicates an authenticated gift. This field will be blank for unauthenticated gifts. **Tip:** To ensure you do not add a new Banner ID for someone who already exists in your Banner database, use the 'Common Matching Entry' from the Options menu on APAWPRS to perform a lookup on the donor name to determine if the unauthenticated donor already exists in Banner. If so, simply associate this unauthenticated gift to that existing Banner individual.	None
Last Name Prefix	Not Supported	N/A
Last Name	Provided by iModules in the gift web service response.	None
First Name	Provided by iModules in the gift web service response.	None
Middle Name	Not supported	N/A
Prefix	Not supported	N/A
Suffix	Not supported	N/A
Date of Birth	Not supported	N/A

Field Label	Gift Integration Support	Configuration Requirements
Gender	Not supported	N/A
Maiden Name	Not supported	N/A
Donor Category	If this is an unauthenticated gift, if a default value for Donor Category has been entered on AGACTRL, that value will default when the gift is loaded into the temporary gift tables.	AGACTRL Please refer to the section of this document entitled One-time gift setup in Banner on page 11.
Preferred Class	Not supported	N/A
Preferred College	Not supported	N/A
Last Login Date	Not supported	N/A
Spouse Information (four name-related fields)	Not supported	N/A
User	The user responsible for pulling this gift over to the Banner temporary gift tables for review. If done manually, this will reflect the user initiating the pull. If done by the scheduler, this will have the value ADVCONN.	None
Activity Date	The date this record was last updated. This is intially set to the date and time the temporary gift records are created in Banner.	None
Gifts Exist	Standard functionality. This gets checked on the form if a record is found in AGBGHLD for the APBWIDN_ID	None
Address Information	Standard functionality. If any of the APBWIDN address fields are populated then this will be checked.	None

Field Label	Gift Integration Support	Configuration Requirements
Exists		

APAWPRS – Address Information tab

The below biographic and address information is *only pulled over from Encompass for unauthenticated gifts*. If it is an unauthenticated gifts, the Billing address information entered by the donor will be displayed to at least provide the one known address for this unauthenticated donor.

Field Label	Gift Integration Support	Configuration Requirements
Address Type	This is not provided by Encompass. Instead this value is populated based on the default Address Type identified on AGACTRL.	AGACTRL Please refer to the section of this document entitled One-time gift setup in Banner on page 11.
House Number	Not supported	N/A
Street Line 1	Provided by iModules in the gift web service response.	None
Street Line 2	Provided by iModules in the gift web service response.	None
Street Line 3	Not supported	N/A
Street Line 4	Not supported	N/A
City	Provided by iModules in the gift web service response.	None
State or Province	Provided by iModules in the gift web service response.	Ensure codes in both systems match so no errors occur when pulling to Banner.

Field Label	Gift Integration Support	Configuration Requirements
Zip or Postal Code	Provided by iModules in the gift web service response.	None
County	Not supported	N/A
Nation	Provided by iModules in the gift web service response.	Ensure codes in both systems match so no errors occur when pulling to Banner.
Processing Instructions	Provided by iModules in the gift web service response.	Instance field. Please refer to the section of this document entitled Setting up instance fields In Encompass on page 30.
Telephone Type	This is not provided by Encompass. Instead this value is populated based on the default Address Type identified on AGACTRL.	AGACTRL Please refer to the section of this document entitled One-time gift setup in Banner on page 11.
Phone Number Components	The billing phone number entered by the unauthenticated donor will display in the Processing Instructions field on the Address Information tab of APAWPRS. This information can be reviewed and then copied and pasted into the appropriate phone number components. The format of this field in Encompass does not allow direct mapping into the Banner Phone number fields.	Require cut & paste by reviewer into the appropriate phone number component fields.
Fax Type and Phone Number Components	Not supported	N/A

Field Label	Gift Integration Support	Configuration Requirements
Email Type	This is not provided by Encompass. Instead this value is populated based on the default Email Type identified on AGACTRL.	AGACTRL Please refer to the section of this document entitled One-time gift setup in Banner on page 11.
Email Address	Provided by iModules in the web service response. This represents the email address provided by the unauthenticated donor with their billing infomrtaion when making the gift.	None

Cashier population

The Cashier value for all gifts posted through AGAWGIF will be reset to the user that posted the gift through AGAWGIF, at the time the gift is posted. With this change, the transactions will show up in the cashiering session of the person who reviewed and posted them.

This change to the gift posting routine impacts all external gifts posted through this form. This includes all external gift transactions from Encompass gift integration, AGPEXGF and unauthenticated self-service gifts.

Additionally, the Cashier field has been removed from the Gift Details tab on AGAWGIF. This is because the value in this field is transient and will be replaced upon posting the gift.

Solicitation Code (ATVSOLC) Refinements

Overview

New functionality allows you to group solicitation/appeal codes for use in reporting aggregate fundraising results. Leveraging a grouping could, for example, provide you with a method to compare year-over-year performance where the individual appeal codes are not as critical as the aggregate group. This works in the same manner that Student Activity Codes (STVACTC) leverage two separate groupings for Type and Category.

ATVSOLC validation form

In order to support this new behavior, two new columns, Group and Category, are now available on the Solicitation Type Code Validation Form (ATVSOLC).

Note

As with previous releases, all Solicitation Type records must have unique Solicitation Type codes.

Fields	Descriptions
Group	This field allows you to group solicitation codes for use in reporting aggregate fundraising results. Values in this drop-down validate against a new Solicitation Group Code Validation Form (ATVSGRP). Solicitation Group Codes are alphanumeric and have a maximum field length of 15. Use of this field is optional.

Fields	Descriptions
Category	This field allows you to categorize solicitation codes. Values in this drop-down validate against a new Solicitation Category Code Validation Form (ATVSCTG). Solicitation Category Codes are alphanumeric and have a maximum field length of 15. Use of this field is optional.

Accessing the ATVSGRP and ATVSCTG validation forms

Each of these new forms can be accessed via the General Menu using Go To and by expanding the Campaign Menu (ALUCAMP), then opening the Campaign Validation (ALUCAMVAL) list and selecting the appropriate form.
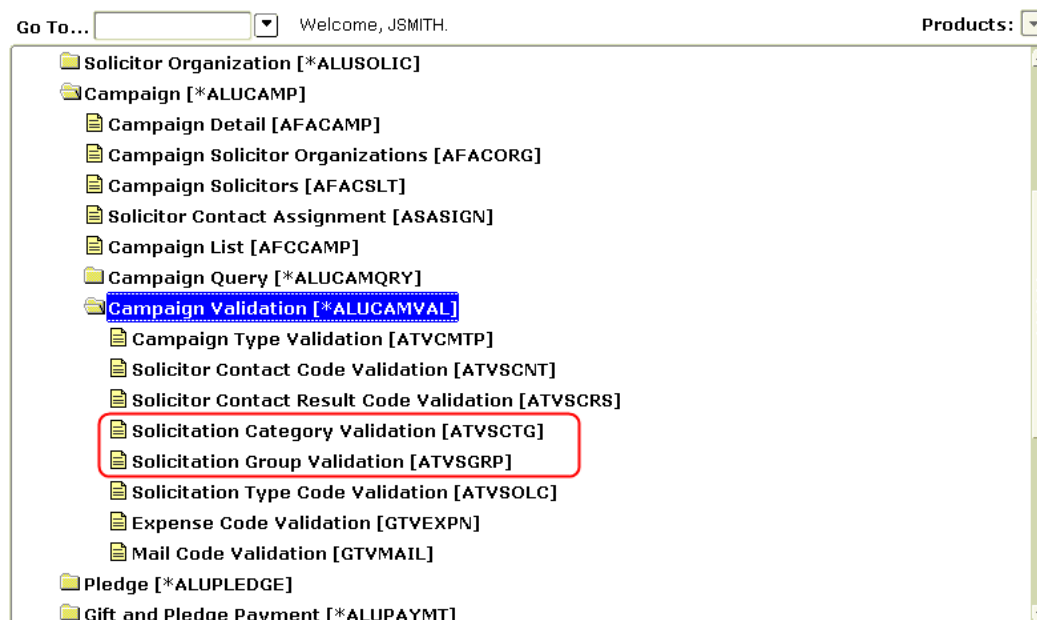
ATVSGRP validation form

A new validation form allows you to identify the Group values that can be associated with solicitation codes.

📋 **Note**

> As with the ATVSOLC validation form, all Solicitation Group codes must be unique; duplicates are not allowed.

📋 **Note**

> Values in this new form are stored in a new database table named ALUMNI.ATVSGRP.

ATVSCTG validation form

A new validation form allows you to identify the Category values that can be associated with solicitation codes.

📋 **Note**

> As with the ATVSOLC validation form, all Category Group codes must be unique; duplicates are not allowed.

📋 **Note**

> Values in this new form are stored in a new database table named ALUMNI.ATVSCTG.

Oracle Fusion Middleware 11/WebLogic Server

Deployment of the Advancement Connector to a WebLogic server is now supported. Prior to this release, deployment of the Advancement Connector was solely supported for Oracle Application Server (OAS). This release increases the support to these two server deployment options.

For additional information on installing and configuring the Advancement Connector using either server, please refer to the *Advancement Connecter Admin and Install Guide*.

3 Technical Changes

This section describes the technical changes in Banner® Advancement 8.5.1.

iModules Encompass one-time gift support

New columns

The following columns were added in order to support new iModules Encompass one-time gift functionality.

Table	Column	Type
AGBGHLD	AGBGHLD_PROC_INSTR	CLOB
APBWIDN	APBWIDN_CREATE_ALT_ID	VARCHAR2(1)
AUBCDEF	AUBCDEF_PFTP_CODE	VARCHAR2(15)
AUBCDEF	AUBCDEF_BANNER_CODE	VARCHAR2(15)
AUBCDEF	AUBCDEF_CONTROL_ID	NUMBER(5)
AUBINST	AUBINST_DFLT_GIFT_CODE	VARCHAR2(2)
AUBINST	AUBINST_DFLT_ATYP_CODE	VARCHAR2(2)
AUBINST	AUBINST_DFLT_DONR_CODE	VARCHAR2(4)
AUBINST	AUBINST_DFLT_TELE_CODE	VARCHAR2(4)
AUBINST	AUBINST_DFLT_EMAL_CODE	VARCHAR2(4)
AUBINST	AUBINST_DFLT_DESG	VARCHAR2(10)

New tables

The following tables were added in order to support new iModules Encompass one-time gift functionality.

ATVPFTP

Table	Column	Type
ATVPFTP	ATVPFTP_CODE	VARCHAR2(15)
ATVPFTP	ATVPFTP_DESC	VARCHAR2(60)
ATVPFTP	ATVPFTP_TYPE	NUMBER(2)
ATVPFTP	ATVPFTP_BASELINE_IND	VARCHAR2(1)
ATVPFTP	ATVPFTP_USER_ID	VARCHAR2(30)
ATVPFTP	ATVPFTP_ACTIVITY_DATE	DATE
ATVPFTP	ATVPFTP_DATA_ORIGIN	VARCHAR2(30)
ATVPFTP	ATVPFTP_SURROGATE_ID	NUMBER(19)
ATVPFTP	ATVPFTP_VERSION	NUMBER(19)
ATVPFTP	ATVPFTP_VPDI_CODE	VARCHAR2(6)

AUBDGIN

Table	Column	Type
AUBDGIN	AUBDGIN_SURROGATE_ID	NUMBER(19)
AUBDGIN	AUBDGIN_TRANS_ID	NUMBER(19)

Table	Column	Type
AUBDGIN	AUBDGIN_INST_ID	VARCHAR2(50)
AUBDGIN	AUBDGIN_PYMT_TRANS_NO	NUMBER(10)
AUBDGIN	AUBDGIN_DATA_ORIGIN	VARCHAR2(30)
AUBDGIN	AUBDGIN_USER_ID	VARCHAR2(30)
AUBDGIN	AUBDGIN_ACTIVITY_DATE	DATE
AUBDGIN	AUBDGIN_VERSION	NUMBER(19)
AUBDGIN	AUBDGIN_ELEMENT_NAME	VARCHAR2(100)
AUBDGIN	AUBDGIN_ELEMENT_VALUE	VARCHAR2(2000)
AUBDGIN	AUBDGIN_EXT_DESG_ID	NUMBER(10)
AUBDGIN	AUBDGIN_INST_ELEMENT_NAME	VARCHAR2(100)
AUBDGIN	AUBDGIN_VPDI_CODE	VARCHAR2(6)

AUBMBIN

Table	Column	Type
AUBMBIN	AUBMBIN_SURROGATE_ID	NUMBER(19)
AUBMBIN	AUBMBIN_TRANS_ID	NUMBER(19)
AUBMBIN	AUBMBIN_INST_ID	VARCHAR2(50)
AUBMBIN	AUBMBIN_DATA_ORIGIN	VARCHAR2(30)
AUBMBIN	AUBMBIN_USER_ID	VARCHAR2(30)

Table	Column	Type
AUBMBIN	AUBMBIN_ACTIVITY_DATE	DATE
AUBMBIN	AUBMBIN_VERSION	NUMBER(19)
AUBMBIN	AUBMBIN_ELEMENT_NAME	VARCHAR2(100)
AUBMBIN	AUBMBIN_ELEMENT_VALUE	VARCHAR2(2000)
AUBMBIN	AUBMBIN_CONSTITUENT_ID	NUMBER(10)
AUBMBIN	AUBMBIN_GROUP_ID	NUMBER(19)
AUBMBIN	AUBMBIN_VPDI_CODE	VARCHAR2(6)

AUBPYIN

Table	Column	Type
AUBPYIN	AUBPYIN_SURROGATE_ID	NUMBER(19)
AUBPYIN	AUBPYIN_TRANS_ID	NUMBER(19)
AUBPYIN	AUBPYIN_INST_ID	VARCHAR2(50)
AUBPYIN	AUBPYIN_PYMT_TRANS_NO	NUMBER(10)
AUBPYIN	AUBPYIN_DATA_ORIGIN	VARCHAR2(30)
AUBPYIN	AUBPYIN_USER_ID	VARCHAR2(30)
AUBPYIN	AUBPYIN_ACTIVITY_DATE	DATE
AUBPYIN	AUBPYIN_VERSION	NUMBER(19)
AUBPYIN	AUBPYIN_ELEMENT_NAME	VARCHAR2(100)

Table	Column	Type
AUBPYIN	AUBPYIN_ELEMENT_VALUE	VARCHAR2(2000)
AUBPYIN	AUBPYIN_VPDI_CODE	VARCHAR2(6)

AURCMAP

Table	Column	Type
AURCMAP	AURCMAP_ELEMENT_NAME	VARCHAR2(100)
AURCMAP	AURCMAP_PFTP_CODE	VARCHAR2(15)
AURCMAP	AURCMAP_CMAP_ID	NUMBER(19)
AURCMAP	AURCMAP_TRANSFER_OUT_IND	VARCHAR2(1)
AURCMAP	AURCMAP_TRANSFER_IN_IND	VARCHAR2(1)
AURCMAP	AURCMAP_BASELINE_IND	VARCHAR2(1)
AURCMAP	AURCMAP_ACTIVE_IND	VARCHAR2(1)
AURCMAP	AURCMAP_USER_ID	VARCHAR2(30)
AURCMAP	AURCMAP_ACTIVITY_DATE	DATE
AURCMAP	AURCMAP_DATA_ORIGIN	VARCHAR2(30)
AURCMAP	AURCMAP_SURROGATE_ID	NUMBER(19)
AURCMAP	AURCMAP_VERSION	NUMBER(19)
AURCMAP	AURCMAP_VPDI_CODE	VARCHAR2(6)

Modified views

The following views were modified in order to support new iModules Encompass one-time gift functionality.

View	New Column
AGVGHLD	AGVGHLD_FISC_CODE
AGVGHLD	AGVGHLD_GIFT_DESC
AGVGHLD	AGVGHLD_ENTRY_DATE
AGVGHLD	AGVGHLD_USER
AGVGHLD	AGVGHLD_CASHIER
AGVGHLD	AGVGHLD_MATCH_RECEIVED
AGVGHLD	AGVGHLD_PGVE_CODE
AGVGHLD	AGVGHLD_GCLS_CODE
AGVGHLD	AGVGHLD_GCLS_CODE_2
AGVGHLD	AGVGHLD_GCLS_CODE_3
AGVGHLD	AGVGHLD_SOL_PIDM
AGVGHLD	AGVGHLD_CARD_AUTH_CODE
AGVGHLD	AGVGHLD_CARD_REFR_NUMBER
AGVGHLD	AGVGHLD_PROC_INSTR

Solicitation Code (ATVSOLC) Refinements

New columns

The following columns were added in order to support new functionality that allows you to group solicitation/appeal codes for use in reporting aggregate fundraising results.

Table	Column	Type
ATVSOLC	ATVSOLC_SGRP_CODE	VARCHAR2(15)
ATVSOLC	ATVSOLC_SCTG_CODE	VARCHAR2(15)

New tables

The following tables were added in order to support new functionality that allows you to group solicitation/appeal codes for use in reporting aggregate fundraising results.

ATVSCTG

Table	Column	Type
ATVSCTG	ATVSCTG_CODE	VARCHAR2(15)
ATVSCTG	ATVSCTG_DESC	VARCHAR2(60)
ATVSCTG	ATVSCTG_USER_ID	VARCHAR2(30)
ATVSCTG	ATVSCTG_ACTIVITY_DATE	DATE
ATVSCTG	ATVSCTG_DATA_ORIGIN	VARCHAR2(30)
ATVSCTG	ATVSCTG_SURROGATE_ID	NUMBER(19)
ATVSCTG	ATVSCTG_VERSION	NUMBER(19)

Table	Column	Type
ATVSCTG	ATVSCTG_VPDI_CODE	VARCHAR2(6)

ATVSGRP

Table	Column	Type
ATVSGRP	ATVSGRP_CODE	VARCHAR2(15)
ATVSGRP	ATVSGRP_DESC	VARCHAR2(60)
ATVSGRP	ATVSGRP_USER_ID	VARCHAR2(30)
ATVSGRP	ATVSGRP_ACTIVITY_DATE	DATE
ATVSGRP	ATVSGRP_DATA_ORIGIN	VARCHAR2(30)
ATVSGRP	ATVSGRP_SURROGATE_ID	NUMBER(19)
ATVSGRP	ATVSGRP_VERSION	NUMBER(19)
ATVSGRP	ATVSGRP_VPDI_CODE	VARCHAR2(6)

Giving History-related field lengths

Modified columns

The following giving history-related field lengths were increased in order to better support international institutions.

Table	Column	Previous Length	New Length
APBGHIS	APBGHIS_LAST_GIFT_AMT	NUMBER(11,2)	NUMBER(17,2)
APBGHIS	APBGHIS_HIGH_GIFT_AMT	NUMBER(11,2)	NUMBER(17,2)
APRCHIS	APRCHIS_AMT_PLEDGED	NUMBER(13,2)	NUMBER(20,2)
APRCHIS	APRCHIS_AMT_PLEDGED_PAID	NUMBER(13,2)	NUMBER(20,2)
APRCHIS	APRCHIS_AMT_GIFT	NUMBER(13,2)	NUMBER(20,2)
APRCHIS	APRCHIS_AMT_MEMO	NUMBER(13,2)	NUMBER(20,2)
APRDHIS	APRDHIS_AMT_PLEDGED	NUMBER(13,2)	NUMBER(20,2)
APRDHIS	APRDHIS_AMT_PLEDGED_PAID	NUMBER(13,2)	NUMBER(20,2)
APRDHIS	APRDHIS_AMT_GIFT	NUMBER(13,2)	NUMBER(20,2)
APRDHIS	APRDHIS_AMT_MEMO	NUMBER(13,2)	NUMBER(20,2)

4 Problem Resolutions

This section summarizes the problem resolutions that are targeted for delivery with Banner Advancement 8.5.1.

📝 **Note**

> For comprehensive and detailed problem, impact, and resolution information for all defects corrected in this release, refer to the supplemental problem resolutions file (`advanc80501resolutions.txt`) delivered along with your release notes. 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 Number	Summary
ADAADAJ	CMS-RPE32415	The designation adjustment form ADAADAJ used to provide a warning message with a designation adjust.
adadesg.fmb agvglst.sql	CMS-DFCT77517	Performance problems with ADADESG and ADAGIFT.
ADBDESG	1-14C1U47	ADBDESG_ACTIVITY_DATE issues.
ADPVSER	1-YH1WD8	WRN-LONGTOK: Token "9,519,650.00" exceeds containing column width (11).
AGAADJS	1-81Y3KF	GURFDED record not deleted when adjusting active pledge status code to inactive pledge status code.
AGAADJS	1-BQCRRA	Pledge/Gift adjustment form AGAADJS does not create comments for certain types of adjustments.
AGAADJS AAAMEMB	1-12BWTZL	i18n - Missing g$_nls.
agaadjs.fmb	1-4W2NLM	Voiding a pledge that has soft or hard credit amts assigned.

Object Name	Defect Number	Summary
AGAGIFT	1-13KBM1Z	FRM-40735: INSERT_AFRCYTP_AFRCRES trigger raised unhandled exception ORA-01400: cannot insert NULL.
AGAGIFT	1-144JKM1	AGAGIFT Broken Gifts created via Direct Access from file menu.
agagift.fmb	1-126APUH	Possibility of creating broken gift record when selecting 'File' option prior to exiting gift.
AGAGMAS	1-10FZJBL	AGAGMAS FRM-41033 error.
agamatg.fmb	1-40MO18	Rollback incorrectly allowed after deleting a lone waiting matching gift on agamatg.
AGAPINS	1-1190LZV	AGAPINS Amount Paid shows zero after an Error.
AGAPINS ATVFREQ	1-8Y5ON7	AGAPINS creating installments can sometimes cause a FRM-40207 error loop.
AGAPLDG	1-12U0952	AGAPLDG form allows you to exit after doing Initial Save on zero amt (planned giving) pledge.
AGAPSOL	1-10A2C44	"Organization's maximum number (X) of current open forms has been reached."
AGARCPT	CMS-DFCT99386	AGARCPT allows for a user to create a duplicate record that indicates that a gift is.
AGATPAY	1-112L4AD	AGATPAY won't allow Roll-back after doing a Record Remove.
agatpay.fmb	1-2AZ9WU	"Neither Hard or Soft pledge credit exist" error when saving a TPP gift on AGATPAY.
agatpfd	1-QKBIB8	The form allows for the same field name to be specified with the same occurrence number.

Object Name	Defect Number	Summary
AGAWGIF	1-112L4AP	*ERROR* Invalid Campaign/Designation combination.
AGAWGIF	1-146C56Z	8.5 version of AGAWGIF Review External Gifts form may not display any gifts.
agawgif.fmb	1-159JDB6	8.5 version of AGAWGIF form not defaulting Donor Category field in.
agawgif.fmb	1-4Z284L	AGAWGIF allowed to create gift record even though ID is not a constituent.
agfagop.sql agfamgp.sql agffisc.sql agfhgay.sql agfhpay.sql agfnmgy.sql AA_GIVING	CMS-DFCT95899	On the last day of the fiscal year, the function F_TOTAL_GIVING_YEAR does not display.
agpacct.pc	1-9LJA14	AGPACCT LIS file contains duplicate title details and is corrupt.
agpmatc.pc	1-1URSWV	HEP Upload report printing incorrect data.
agpmatc.pc	1-3D4VIL	AGPMATC is not updating all fields.
agpmatc.pc	1-3UNFN4	AGPMATC writes incorrect GOREMAL_ACTIVITY_DATE on URLs.
AGPREM2	CMS-DFCT105725	AGPREM2 does not process the Parameters for Pledge Type and/or Pledge Class when submitted.
AMACOMT	1-10A1U85	Form AMACOMT.fmb compile failure.
AMACONT APACONT	1-14KW0KJ	AMACONT/APACONT Attendees tab may become inaccessible.
AMAINFO	1-11MYDII	Duplicate Key row in Research / Research Data tab is not allowed - need user friendly msg not error.

Object Name	Defect Number	Summary
AMAPROP	1-10N8A8D	Inconsistent behavior with the SDE light bulb on form AMAPROP.
AMAPROP	1-1180QM4	AMAPROP and proposal results.
AMAPROP AMAINFO	1-144JKRS	AMAPROP Project Effective Dates may be incorrect.
AMRATTN APACONT AMACONT	1-14B5JZ5	Changing the originator on the Additional Attendees tab gives wrong value in User field.
AOAIDEN	1-10A1HX1	When doing a constituent search from the AMAPROP form, drop downs are disabled.
APAACTY	1-Z8E64C	The Close 'X' button is missing on the Years of Participation and Leadership portion of the APAACTY.
APACMAS	1-107ES8N	Form allows Rollback without prompting to Save, all unsaved data is lost as a result.
APACOMT	1-12BUM9J	After doing an Insert/Duplicate record function Originator field is protected.
APASBIO	1-140YVIO	Employment Details button on APASBIO does not work if there is an Inactive work Address.
apkldr1.sql	1-CD65VX	APPCUPD may load phone numbers that already exist; primary indicator setting may be lost.
APPDCLB	CMS-DFCT95129	Performance problems when running APPDCLB version 6.0 defect 95129.
APPDEXT	1-Y71Z1D	Appdext - phone parameter incorrect length.
APPSTDI	1-R780X0	"TO date for Address must be after FROM date for Address." error for TO_DATEs with year of 2050.

Object Name	Defect Number	Summary
APRDHIS APADHIS	1-14B5KF7	APRDHIS_AMT_MEMO not decreased when AGAGMEM record removed.
ATVPROJ	1-XG2EPS	Project codes on ATVPROJ can be removed even though the code exisst on the AMRPROP table.
AUAALRT	1-14IY3CK	Supervisor Alert visible only to creator, not other supervisors.
aukcon1.sql	1-10ZP9LX	Advancement connector not updating data origin for GOREMAL updates.
APAXREF/APACONS	1-4NQPET	Change XREF Spouse code on APAXREF may cause problems.
ATVVSER	1-BR3FIK	ATVVSER- SDE does not change when scrolling through records.
upgrade	1-TA18SC	advconn_08040001.sql, advconsched_080401 fail because they do not have restricted session privilege.
upgrade	1-BAGPB1	AGAADJS Possible problem with voiding gifts in Advancement 8.3.