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Banner Advancement
Release Guide

Release 8.8
December 2015

Revision History

Publication Date	Summary
December 2015	New version that supports Banner Advancement 8.8 software

Contents

Introduction

This release guide documents Release 8.8 of Banner® Advancement. This release is a cumulative rollup of all releases and patches delivered since the Banner Advancement 8.7 release. The 8.8 release includes the following:

Cumulative documentation

This document provides detailed information about the Banner Advancement 8.8 release only. Banner Advancement 8.8 is a cumulative release that also includes enhancements, ideas, and change request resolutions delivered in the Banner Advancement releases since 8.7. For complete documentation about these interim releases, please refer to the release guides identified in the table that follows.

Release Number	Contents	Release Date
8.7.1	Enhanced Automatic Creation of Pledge Payment Soft and Hard Credits, Student-Advancement Interface (APPSTDI) Report Refinements, Copy Pledge Class and Comment to Pledge Payment, Miscellaneous Enhancements, Resolutions	June 2014
8.7.1.1	Data Integrity Checks, Future Installment Recalculation, Resolutions	October 2014
8.7.1.2	Gift Enhancements	October 2014
8.7.1.3	Giving History Enhancements	November 2014
8.7.1.4	Third-Party Pledge Payment Enhancements, Resolutions	December 2014
8.7.1.5	Third Party Soft Credit Calculation Enhancements	July 2015

Third Party Gift and Pledge Payment Adjustment Enhancements

Previously, you could change any details for the credit awarded on a third party gift or pledge payment from the Hard Credit ID (AGAGIDS) or Gift Soft Credit ID (AGAGMEM) forms. To manage the details in giving history and to ensure that all updates are handled correctly, both forms are now display only when a third party record is selected. To prevent a third party gift or pledge payment from being changed on one of these forms, the relevant fields are now display only. You must use the Pledge/Gift Adjustment (AGAADJS) form to make all adjustments.

Changed forms

The following forms were changed to support this enhancement.

Gift Hard Credit ID (AGAGIDS) form

The label of the **Third Party Amount** field was changed to **Third Party Pledge Payment Amount**, and this field is now display only if the pledge or gift is a third-party pledge.

Gift Soft Credit ID (AGAGMEM) form

The label of the **Third Party Amount** field was changed to **Third Party Pledge Payment Amount**, and this field is now display only if the pledge or gift is a third-party pledge.

Pledge and Gift Payment Void Enhancements

The procedure for voiding a pledge or gift payment was simplified. Previously, you had to void the transaction in two places on the Pledge/Gift Adjustment (AGAADJS) form:

- The Pledge Adjustment *and* Pledge Adjustment Detail sub-tabs of the Pledge Adjustment tab for pledge payments

- The Gift Adjustment *and* Gift Adjustment Detail sub-tabs of the Gift Adjustment tab for gift payments

Now, you have to void a transaction only once, on the Pledge Adjustment or Gift Adjustment sub-tab, as applicable.

When the system voids a pledge payment, the amount is deducted from the applicable fields in the following forms:

- Designation (ADADESG) form

- Campaign Detail (AFACAMP) form

- Gift Hard Credit ID (AGAGIDS) form

- Gift Soft Credit ID (AGAGMEM) form

- Gift Solicitor (AGAGSOL) form

- Pledge Installment (AGAPINS) form

- Pledge List (AGCPLDG) form

- Giving History by Campaign (APACHIS) form

- Combined Giving Summary (APACOMB) form

- Giving History by Designation (APADHIS) form

- Giving History by Fiscal Year (APAFHIS) form

- Giving History Summary (APAGHIS) form

- Giving/Membership Summary (APAGSUM) form

Changed form

The following form was changed to support this enhancement.

Pledge/Gift Adjustment (AGAADJS) form

The logic for this form was changed so that all void transaction processing occurs when you click the **Void** button on the Pledge Adjustment sub-tab of the Pledge Adjustment tab for pledges or on the Gift Adjustment sub-tab of the Gift Adjustment tab for gifts or pledge payments.

The **Void** button was removed from the Pledge Adjustment Detail sub-tab of the Pledge Adjustment tab and from the Gift Adjustment Detail sub-tabs of the Gift Adjustment tab.

Gift and Pledge Class Enhancements

Previously, the system allowed you to enter only one gift class and one pledge class on the Pledge/Gift Default (AGAPDEF) and Third Party Payment (AGATPAY) forms. To support campaigns for which most gifts or pledges require multiple classes, you can now enter up three gift and pledge classes.

You can now also enter a free-form gift-related comment.

The class codes can now be defaulted to the following forms:

- Gift (AGAGIFT) form

- Pledge (AGAPLDG) Form

- Pledge Mass Entry Form (AGAPMAS)

This delivers CR000122107, CR000122108, and CR000122119.

The rest of this section discusses the following topics:

Changed forms

The following forms were changed to support this enhancement:

Pledge/Gift Default (AGAPDEF) form

The label of the **Class** field in the **Gift Default Data** block was changed to **Class 1**, and the following fields were added:

- **Class 2**

- **Class 3**

- **Comment**

The label of the **Class** field in the **Pledge Default Data** block was changed to **Class 1**, and the following fields were added:

- **Class 2**

- **Class 3**

Gift (AGAGIFT) form

The values entered in the **Class 1**, **Class 2**, **Class 3**, and **Comment** fields in the **Gift Default Data** block of AGAPDEF now default into the **Gift Class 1**, **Gift Class 2**, and **Gift Class 3** fields of the **Gift or Pledge Payment** tab of AGAGIFT.

Pledge (AGAPLDG) form

The values entered in the **Class 1**, **Class 2**, and **Class 3**, fields in the **Pledge Default Data** block of AGAPDEF now default into the **Pledge Class 1**, **Pledge Class 2**, and **Pledge Class 3** fields of the **Pledge Header** tab of AGAPLDG.

Pledge Mass Entry (AGAPMAS) form

When you use Copy Pledge Defaults on the Options menu, the system enters the values from the **Class 1**, **Class 2**, and **Class 3**, fields in the **Pledge Default Data** block of AGAPDEF into the **Class**, **Class 2**, and **Class 3** fields of the key block of AGAPMAS.

Third Party Payment (AGATPAY) form

The label of the **Class** field in the **Gift Information** block was changed to **Class 1**, and the following fields were added:

- **Class 2**

- **Class 3**

Changed table

The following table was changed to support this enhancement.

AGBPDEF

The following columns were added to this table.

AGBPDEF_PCLS_CODE_2	VARCHAR2(4)
AGBPDEF_PCLS_CODE_3	VARCHAR2(4)
AGBPDEF_GCLS_CODE_2	VARCHAR2(4)
AGBPDEF_GCLS_CODE_3	VARCHAR2(4)
AGBPDEF_GIFT_COMMENT	VARCHAR2(300)

Miscellaneous Enhancements

The following miscellaneous enhancements were delivered for this release:

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Project/interest code enhancement

You can now specify whether a project/interest code is active on the Project/Interest Code Validation (ATVPROJ) form.

This delivers CR-000123113.

The rest of this section discusses the following topics:

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Changed forms

The following forms were changed to support this enhancement.

Project/Interest Code Validation (ATVPROJ) form

The **Active** check box was added to this form.

Miscellaneous forms

If a project/interest code is inactive, it is not displayed in drop-down lists on forms, nor can it be entered manually.

If a code was assigned to a record when it was active and later is changed to inactive, the code continues to be displayed on the record. The project/interest code on a record with an invalid code can be maintained, but if you enter the same or another inactive code, the change cannot be saved.

The logic of the following forms was changed to prevent using an inactive project/interest code.

Form	Location	Field
Function Affiliation (AEAAFIL)	**Projects** block	**Code**
Prospect Contacts (AMACONT)	**Contacts** tab	**Project**
Project Designations (AMADESG)	Key block	**Project**
Prospect Strategy Plan (AMAPLAN)	**Strategy Assignment** block	**Project**
Prospect Pool Inquiry (AMAPOOL)	Key block	**Project**
Moves by Project (AMAPROJ)	Key block	**Project or Interest Area**
Moves by Prospect (AMAPROS)	Key block	**Project or Interest Area**
Moves by Staff (AMASTAF)	Key block	**Project**
Strategy Plan Rules (AMASTGY)	Key block	**Project**
Advancement Prospect Information (AMAINFO)	**Project and Interest Areas** window	**Code**
Prospect Proposal (AMAPROP)	**Summary** sub-tab of the **Projects** tab	**Project**
Strategy Plan List (AMCSTGY)	Main window	**Project**
Contact Mass Entry (APACMAS)	**Prospect Details and Action** window	**Project**

Changed table

The following table was changed to support this enhancement.

ATVPROJ

The following column was added to this table.

ATVPROJ_ACTIVE_IND   VARCHAR2(1)

User interface improvements

This release delivers the following improvements to Banner Advancement user interface:

- "Changed forms" on page 14

- "Changed reports" on page 16

- "Changed tables" on page 16

- "Changed view" on page 16

Changed forms

The following forms were changed to support this enhancement:

- "Advancement Cashier Session Review (AGACREV) form" on page 14

- "Employer Matching Gift Payment (AGAMATG) form" on page 15

- "Designation Within Campaign List (AGCDESG) form" on page 15

- "Prospect Pool Inquiry (AMAPOOL) form" on page 15

- "Prospect Proposal (AMAPROP) form" on page 15

- "Advancement Individual Search (AOAIDEN) form" on page 15

- "Advancement Organization Header (AOAORGN) form" on page 15

- "Solicitor Annual Goals (ASASANG) form" on page 16

Advancement Cashier Session Review (AGACREV) form

Supervisor users can now add comments to active and inactive cashiering sessions. This delivers CR-000123021. To support this change, the following fields were added to this form:

- **Comment** field on the **Current Session** tab

- **Comment** field in the **Inactive Session Details** block of the **Inactive Sessions** tab

In addition, supervisor users can now also update the value in the **Drawer Total** field on of the **Inactive Sessions** tab after a session has been finalized. Non-supervisor users still cannot update this value. This delivers CR000122117.

Employer Matching Gift Payment (AGAMATG) form

Previously, the system sorted pending matches in gift number order (oldest to newest) on this form. It now sorts them in name order. This delivers CR000122111.

You can now query on the **ID** and (untitled) **Name** fields. This delivers CR000122112.

Designation Within Campaign List (AGCDESG) form

Previously, the system displayed only the designation code on this form. The **Name** field, which displays the description associated with the designation code, was added to the **Designation Within Campaign List** window to provide better clarity. This delivers CR000122113.

Prospect Pool Inquiry (AMAPOOL) form

The results of a search on this form are now sorted by name instead of PIDM. This delivers CR000122116.

Prospect Proposal (AMAPROP) form

To make it easier to find gifts and pledges on the Results sub-tab of the Projects tab of the Prospect Proposal (AMAPROP) form, date columns were added to the list of values windows as follows:

- **Gift Number** field: the Gift Date column was added to the All Gift Credit window

- **Pledge Number** field: the Pledge Date column was added to the All Pledges window

This delivers CR000122115.

Advancement Individual Search (AOAIDEN) form

The **Deceased** check box was added to this form. The check box is display only and cannot be used for filtering. The value defaults from SPRIDEN. This delivers CR000122120.

Advancement Organization Header (AOAORGN) form

Because the type of business an organization is in often is unknown, the system no longer requires a value for it to be entered on this form. The **Business** field in the **Business Information** block is no longer required. This means that you can now create an organizational record on this form by entering only a category in the top data block. (All other fields on the first tab are optional.) If this occurs, the organizational record in the AOBORGN table could have no values populated except the PIDM, activity date, and create date. This delivers CR000122109.

Solicitor Annual Goals (ASASANG) form

You can no longer assign a contact to a solicitor, solicitor organization, and year combination to which the contact is already assigned on this form. If you try to assign a contact to a solicitor, solicitor organization, and year combination to which the contact is already assigned, the system now displays an error message and does not create a new record. This delivers CR000122114.

Changed reports

The following reports were changed to support this enhancement.

Pledge Activity (AGPPACT) report

The message ***DECEASED*** is now displayed for deceased persons. This delivers CR000122118.

Changed tables

The following tables were changed to support this enhancement.

AGBCSHR

The following column was added to this table.

AGBCSHR_COMMENT   CLOB

AOBORGN

The AOBORGN_BUSINESS column is now nullable.

Changed view

The following view was changed to support this enhancement.

AGVMGID

The following columns were added to this view:

- AGVMGID_EMPL_FORM_NAME
- AGVMGID_EMPL_SURNAME_PREFIX

Changed PLUS scripts

The files listed in the following table that are part of the Banner Advancement Upgrade and are migrated to $BANNER_HOME, but not applied anytime during the upgrade. These scripts can be applied anytime after the upgrade is applied.

Script Name	Description
advmessage.sql	This is an optional script to register/unregister the banner_advancement_messages.xsd to xmlschema, which is part of GivingHistory web service.
ahistory.sql	This script will update the alumni history tables from pledge and gift detail data. Included are insert statements for the APRCHIS and APRDHIS tables for IDs that have received pledge multiple or gift multiple/memo credit.
afixpdes.sql	Script to identify and correct the pledges with incorrect amount paid in the pdes record.
conn_push_02.sql	Script to insert data for Banner Push profile in a Advancement Connector Definitions Repeating Table.
conn_push_01.sql	Script to Insert data for Banner Push profile in a Advancement Connector Definitions Base Table.
conn_pull_02.sql	Script to insert data for Banner Pull profile in a Advancement Connector Definitions Repeating Table.
conn_pull_01.sql	Script to insert data for Banner Pull profile in a Advancement Connector Definitions Base Table.
conn_map.sql	Script to insert new values for the iModules mapping table
conn_gift_pull_02.sql	Script to create a Gift pull profile in a Advancement Connector Definitions Repeating Table.
conn_gift_pull_01.sql	Script to create a Gift pull profile in a Advancement Connector Definitions Base Table.
build_searches.sql	This script will insert the supported Banner baseline values into the AOBDOSR and AORDOSR tables for all existing Advancement Officers who do not already have any Custom Searches built.
aunhonpl.sql	This script will update pledges to a 'U' status (Unhonored) based on an outstanding balance and a prompted campaign.
aseason.sql	Script to update seasonal addresses based on parameters of a date range to compare to the From date of the address.
afixhigh.sql	Script to update the highest gift information on APBGHIS. It was not being set on an IDs first gift. This script will only update if the record exists but the APBGHIS_HIGH_GIFT_NO is NULL.
afixghis.sql	Script to update APBGHIS - giving history summary table.

Script Name	Description
acontact.sql	This script has the following parts: • PART 1: Insert a contact record for those in the population that already have an existing contact record. • PART 2: Insert a contact record for those in the population that do not already have an existing contact record. • PART 3: List out those in the population that were not prospects and therefore no contact was created. • PART 4: List out those in the population that were prospects and therefore contacts were created.
acompare.sql	Sql script to compare giving over two date ranges by inserting into temporary tables to be used for internal processing within processes. This script will have the following parts: • PART 1: Insert records into agrtemp based on two prompted for date ranges. • PART 2: Build agrtmp2 by inserting ranges and zeroes for the dollars and donor counts. • PART 3: It will then update agrtmp2 with the counts of dollars and donors. • PART 4: Display the output of the report. • PART 5: Clean up (delete records) agrtemp and agrtmp2
del_status_history.sql	This routine is optional. Institution can be used to delete the extra status history records created from scenario two of the defect# CR-000120208. This script will identify and delete all existing status history (AMRPSTH table) records with the value in **Status** and other fields are blank, on AMAINFO Status History tab.

Seed data support for the Event Attendance enhancement in Advancement Self-Service

The following seed data is delivered in this release to support the Event Attendance enhancement delivered in Banner Advancement Self-Service 8.9.

Advancement Officer Web Profile Items Validation Form (ATVDOWP)

The following seed data was added to this table.

Code	Description	Advancement Individual Profile Display Indicator and Position	Advancement Organization Profile Display Indicator and Position	Prospect Profile Display Indicator and Position	Display	Title
EVNT	Event Attendance	Selected 29	Selected 25	Selected 23	Selected	Event Attendance

Advancement Officer Web Manage My Prospects Form (ATVDOPP)

The following seed data was added to this table.

Code	Description	Sequence	Display	Section Title
EVENTATTD	Event Attendance	15	Selected	Event Attendance

Resolutions

The Banner Advancement Resolutions Report 8.8 is a companion to this release guide. The Resolutions Report provides summary information about the change requests that are resolved in Banner Advancement 8.8. Use the following steps to access the Resolutions Report on the Ellucian Support Center:

1. Go to https://ellucian.force.com/clients/home/home.jsp.

2. Sign in to the Ellucian Support Center.

3. Select the **Documentation Libraries** tab.

4. Search for the Banner Advancement Resolutions Report 8.8.