New Features and Functionality - Advance for the University of Arkansas

System Refinements

System Options Chart

Title	Short Description	Release Number	System Option #	Follow Up
Work-In-Progress Notification	Hourglass shows you that a task is being performed	9.10.0		
Paging Indicator	VCR buttons now on top AND bottom of form	9.10.0		
Toggling Through Open Tabs Using Shortcut Keys	Allows movement through the open tabs via shortcut keys	9.10.0		
Prevention Of Manually Adding Invalid Ids To The Clipboard	Cannot manually add invalid IDs	9.10.0		
Pasting Entity Ids To The Clipboard	Advance accepts IDs pasted in despite incorrect leading 0s	9.10.0		
Pop-Up Alerts	Pop-up if accessing entity for first time and alert is present	9.10.0	33	
Reason Code Added To Alerts	Reason code field added to alerts form.	9.10.0		
Staff Maintenance	View list of staff members before access Staff Maintenance form	9.10.0		
Password Length Increased	Password length increased to 18 characters	2015	232	
Clipboard Refinement	Keyword search for loading clipboard from list	2015		
Mailing List	Previously, duplicate fatal error messages were displayed if a list and stop date had the same value for a mailing list row	2015		
Enhanced Refresh Of Clipboard List	selected ID remains highlighted on the Clipboard page	2017		
Added 'My Lists' To Load List	Added 'My Lists' to Load List	2017		
Telephone Start Date Auto-Populates When Adding A New Entity	Telephone Start Date auto-populates when adding a new Entity	2017		

System Chart - Lookup Chart - Biographic Chart - Entity Update Chart - Entity Merge Chart
DataLoader Chart - Gift and Pledge Chart - Gift Pledge Loader Chart - Membership Chart
Prospect Tracking Chart - Events Chart - TMS Chart - System Option Code Chart

New Features and Functionality - Advance for the University of Arkansas

Email Stop Date Auto-Populates When Making An Email Past	Email Stop Date auto-populates when making an Email Past	2017		
Added Comment Column For Dataloader ID	Added Comment column for Data Loader ID	2017		
Enhanced Drill Down On Messages	Message page now displays only the selected message instead of a list of messages	2017		
Added A Prompt Message To Update Joint Name When Primary Name Changes	Added a prompt message to update joint name when primary name changes	2017		
Ability To Import External Data Into Advance Clipboard	Keyword search for loading clipboard from list	2016		
F3 shortcut for Allocations	Use F3 to put another Allocation code on the Overview and Detail application on the Allocation Page without going through the lookup screen	2016		
F3 Shortcut For Other Specific Applications	Additional F3 functionality is added for specific applications	2016		

New Features and Functionality - Advance for the University of Arkansas

Lookup Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
Lookup By Name	Last Name/Org and First Name fields increased to 120 and 60 characters respectively	9.10.0		
Saved Criteria Refinements	Streamlined lookup process	9.10.0		
Manual Entry And Display Of TMS Codes	Users performing lookups can enter TMS code if they know the code	9.10.0		PLAY
Preferred Email Added To Entity Lookup Result	Lookup result now includes preferred email	9.10.0		
Soft Credit Added To Giving Transaction Lookup Result	Giving Transaction Lookup result now contains Soft Credit amount	9.10.0		
Looking Up Contact Reports And Notes Using Text	Search Contact Reports and Notes by Text field	9.10.0		
Sounds Like Logic Refinements	Sounds Like Logic Refinements	9.10.0		
Copy To Excel	Ability to copy the results of a lookup to Excel has been added	2015		
Look-Up Capability For Race/Ethnicity	Look-up capability for Race/Ethnicity	2017		
Look Up Gifts Using Comments	Look up Gifts using comments	2017		
Entity - Deleted Indicator	Added a new item, Deleted indicator = 'N' to the lookup Bio nav tree	2016		

New Features and Functionality - Advance for the University of Arkansas

Biographic Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
Add Person And Add Organization Refinements	Address source, address start, phone source, and phone start fields now appear on the add person and add organization forms	9.10.0		
Add New Person With Employer And Job Title	Includes Employer and Job Title fields when adding a new person through Add Person form	9.10.0	16	
Entity Detail Refinements	Entering and maintaining Entity information made more efficient	9.10.0		
Telephone Hyperlink On Entity Overview	Entity Overview now displays Entity phone number as hyperlink to Telephone form	9.10.0		Test against PROD
Adding Alternate Names For Organizations	Allows use of Org Long Name 2	9.10.0		
Mail Name Generation Method	3 Options for generating names in Advance	9.10.0	17	Check with Jeanie
Same Home Address And Telephone Refinements	Marital Information form allows Same Home Address and/or Same Home Telephone even if neither spouse has either	9.10.0		
Address, Phone, And Email On Organization Contacts	New fields and functionality on the Org Contacts form	9.10.0		

Adding New Employment Records With Address Information	New field allows association of existing address record with employment record at addition of employment record	9.10.0		
School, Division, And Department Defaults On Local Degrees	Automatic default of School, Division, Department codes associated with selected Major	9.10.0	7	
Modifying Employment Information	Advance automatically blanks out values on name-only employment record when entering an ID number	9.10.0		
Primary Indicator On Marital Information	Radio buttons that allow designating primary giver for allocations and gifts	9.10.0	391	
Marital Status Prompt When Adding A Former Spouse	Prompts to set status of former spouse	9.10.0		
Joint Salutation Generation	Allows specification of format for new Joint Salutation	9.10.0	390 & 26	
Date Modified Added To Contact Information Form	Date Modified Added to Contact Information Form	9.10.0		
Change Source Added To Marital Information, Employment, And Mail Control Forms	Change Source Added to Marital Information, Employment, and Mail Control Forms	9.10.0		
Comment Field Expansion	Multiple comment fields expanded from 255 to 2000 characters	9.10.0		
Contact Name And Title Expansion In Contact Table	Increased from 40 to 120 characters	9.10.0		

Trailing Spaces In Entity Name	If a user enters one or more trailing spaces at the end of an entity name, the system now trims the trailing spaces	2015		
Entity Duplicate Checking Refinement	Added zip code and state fields to the existing matching fields	2016		

Entity Update Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
Telephone, Address, Email, And Employment	Streamlined approach to add and/or modify telephone, address, email and employmet information	9.10.0	260	Play
Status, Original Source, And Change Source	New fields on telephone, address, email and employment forms	9.10.0	260	
Operator Name On Entity Updates	Operator name of individual batch transactions is associated rather than one name for entire batch	9.10.0	260	
Entity Update Email Option	Determine whether all fields on the Entity Update application will be included in the email sent to the designated recipient	9.10.0	260=OFF, 399=ON	Play
Other Addresses And Additional Emails	Additional fields added	9.10.0	260=OFF	Compare to PROD
Home Phone In Contact Information	home phone number is now displayed in the Contact Information section of the Entity Overview form even if	2015		

	there is no address data for the entity record			
Allocation Alerts	You can now add an alert for an allocation on the new Allocation Alerts page	2015		

Entity Merge Utility and Entity Merge and Purge Utility Refinements Go-To				
Title	**Short Description**	**Release Number**	**System Option #**	**Follow Up**
Purging Entities and Related Reversal Data	See description	9.10.0	400 = OFF	Confirm UA Merge routine still works

New Features and Functionality - Advance for the University of Arkansas

Dataloader Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
Race And Ethnicity Template	Modify race and ethnicity via DataLoader	9.10.0		
Exclude Warnings On Dataloader Batch Error Log	Filter warnings from Error Log	9.10.0		
Dataloader Batches That Fail Creation	See description	9.10.0		
Required Field Indicator In Dataloader Batch Metadata Maintenance	New field that indicates whether info is required for additions,modifcations, and deletions.	9.10.0		Tate Review

New Features and Functionality - Advance for the University of Arkansas

Gift and Pledge Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
Bi-Weekly, Weekly, And Bi-Monthly Pledge Payments	Bi-Weekly, Weekly, and Bi-Monthly Pledge Payments	9.10.0		
Additional Security Details	Amount, Tender, NPV, Memo, Cover and Deduction fields all appear in inquiry-only	9.10.0		
Check Number Expansion	Check number field expanded from 10 to 30 characters	9.10.0		
Next Payment Balance On Scheduled Payments Overview	New field displays balance due on the next scheduled payment	9.10.0		
Audit Trail Display For Reversals	Reversed transactions now display on the Giving Views	9.10.0		
Giving Views	New GoTo takes you straight to Giving Views	9.10.0		
Reason Changed Date Added To Transaction List With Audit Giving Views	Reason Changed Date Added to Transaction List with Audit Giving Views	9.10.0		
Allocation Code Added To Matching Gift Transaction Views	Allocation Code Added to Matching Gift Transaction Views	9.10.0		
Copying Gift Club Information To The Clipboard	Can now copy entity ID number of gift club to clipboard	9.10.0		
Covered By Accounts	Covered by Accounts allows you to view a list of entities that cover the selected entity when making financial transactions	9.10.0		
Covering Account Logic Added To Eft Payments	Covering account donors will be added to pledge payment and the percentage from the covering account data will be utilized	9.10.0		
Performance Improvement On Gift Tender Type	Performance increase for entities that have more than 30 gifts	9.10.0		
Gift Pledge Loader	Load financial transactions from an external source into Advance	9.10.0		

Electronic Fund Transfer Payment For Pledges	Automatically generate the payment schedules using the new payment frequencies	9.10.0		
Pledge Reminders	Display these new payment frequencies (Weekly, Bi-Weekly, and Bi-Monthly) on the pledge payment reminders report	9.10.0		
Associating Events With Gifts	You can now associate events with gifts via an appeal	2015		
Gift Appeal Header Detail Form	Event ID field was added to the Gift Appeal Header Detail form	2015		
Gift Appeals Header Lookup Form	Event ID field was added to the Appeals Header (Gift) Lookup form	2015		
Ability To Establish Gift And Pledge Types Relationships	Link a pledge or gift type with a transaction type using the new Gift and Pledge window	2015		
Ability To Hide Confidential And Anonymous Gifts	You can now hide confidential and anonymous gifts from certain Advance users	2015		
Added A New Application Rcpt To Find Reversed Transactions	Added a new application RCPT to find reversed transactions	2017		
Joint Gift/Pledge Refinement	Link pledge to Classic gift and make it a pledge payment without overwriting the source of gift	2016		
Link Pledge To Gift	Added 'Apply to Other donors' check box in 'Giving codes' forms for both new gift and pledge	2016		
Giving Codes Refinement	Added a new application RCPT to find reversed transactions	2016		

New Features and Functionality - Advance for the University of Arkansas

Gift Pledge Loader Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
Loading Open-Ended Pledges	Supports the loading of open-ended pledges	9.10.0		
Loading Transactions With Notes	Supports Loading Transactions with Notes	9.10.0		
Linking A Pledge And Pledge Payment (Gift) Together In The Same Gift Pledge Loader Batch	Pledges and pledge payments can no be added and linked together in the same Gift Pledge Loader batch.	9.10.0		Check with Elizabeth
Adding Multiple Premiums Per Transaction	Load up to four premiums per transaction	9.10.0		
Associating A Run With Gift Defaults	use the new Gift Defaults page to associate defaults with the transactions in the batch	9.10.0		
Using Streamlined Gift Entry With Gift Pledge Loader Batches	Batches can no be reviewed and processed using the streamlined gift entry functionality	9.10.0		Play

New Features and Functionality - Advance for the University of Arkansas

Membership Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
Membership Views	GoTo takes you directly to Membership views	9.10.0		
Membership Appeal Campaign Statistics	Report only includes appeal headers when the actual revenue for the appeal header is greater than zero	9.10.0		
Associating Events With Memberships	You can now associate events with memberships	2015		
Membership Appeal Header Detail Form	Event ID field was added to the Membership Appeal Header Detail form	2015		
Membership Appeals Header Lookup Form	Event ID field was added to the Appeals Header (Gift) Lookup form	2015		
Contact Report Refinements	If you enter a value in the unit column when adding a contact report, that value is now populated in the contact report credit table	2015		
Entity Tasks	Use GOTO to see a list of all tasks associated with an entity ID number	2015		
Task List	Display all of the types of tasks associated with an entity without the user doing a task lookup	2015		

New Features and Functionality - Advance for the University of Arkansas

Prospect Tracking Refinements Go-To				
Title	**Short Description**	**Release Number**	**System Option #**	**Follow Up**
Pasting Text Into Text Areas	Advance automatically removes html tags from pasted text	9.10.0		
Prospect Tracking Cascade	See description	9.10.0	44	
Contact Type Expansion	Contact type field expanded from 1 to 3 characters	9.10.0		
Primary Entity Field	Primary Entity field was added to the Prospect Lookup form	2015		
Allocation Stewardship Refinements	Added an indicator to navigation tree for the Allocation Stewardship	2016		
Entity Notes Refinements	Added a Joint Indicator check box in Entity notes	2016		

New Features and Functionality - Advance for the University of Arkansas

Events Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
Event Participation List	Addition of Participant Status field named Status	9.10.0		
Display Of Cancelled Event Participations Or Registrations	Users can now choose whether to display cancelled registration and participant data	2015		
Event Navigation Tree Changes	Forms were added to the Event navigation tree to allow users to view cancelled registration and participant data	2015		
Display Event URLs	You can now add an event's URL on the Event Detail form	2015		
Event Lookup And Event Detail	Added address line fields for the venue in Events for greater flexibility to enter detailed venue information	2016		

New Features and Functionality - Advance for the University of Arkansas

TMS Refinements

Go-To

Title	Short Description	Release Number	System Option #	Follow Up
New Gender Table	New gender table	2015		
Table Code Maintenance Refinement	If you know all or part of a code, you can now perform a keyword search on the TMS Edit Code Form to find the record	2015		
Tms_Task Context Column Refinement	Control which codes show in the drop-down lists based on the values in the context column	2015		
Expand Institution Name	Expanded the institution_name field in the institution table from 40 to 100 characters	2016		

New Features and Functionality

System Refinements

Work-In-Progress Notification

Advance introduces a new visual indicator that alerts the user when a task is being performed. When a task is being performed, an hour glass will appear. When the requested task is complete, the hour glass will disappear. This visual indication can be of particular importance if Advance is performing multiple tasks simultaneously, working with several records, or performing a complex lookup because it alerts the user that the task is not yet complete.

Areas impacted by this new functionality that typically require additional time for processing based on the volume of data, which benefit from this visual indication, include the following:

- Clicking Save during Gift and Bio data entry. The hour glass will appear while Advance is performing the validation and logic checks and when the checks are complete, the hour glass will disappear and the user will receive a message indicating the save was successful.
- Updating TMS codes
- Performing lookups
- Running reports
- Performing an immediate Mass Update operation (Add, Modify or Delete)
- Saving changes to Business or Home Telephone records
- Re-loading the Home Page by selecting Close All Tabs
- Saving changes to a Contact Report

Paging Indicator

Advance now includes pagination controls on both the top and bottom of forms that contain pagination controls. Previously, controls only appeared at the top, which meant users had to scroll up to reach the controls to navigate to the next page when working with a long form. Paging controls will appear on both the top and bottom of the form unless the form also has a form_height form option, in which case it will only have the paging controls on the top of the form. This behavior occurs because the information will not scroll off the page and two sets of pagination controls visible on the form at the same time is not desirable.

Toggling through Open Tabs Using Shortcut Keys

New shortcut keys allow you to toggle between open tabs.

- Alt + Page Down – Allows you to move to the tab to the right of the current tab.

- Alt + Page Up – Allows you to move to the tab to the left of the current tab.

Note: When using these shortcut keys to navigate between tabs, certain browsers may restrict your ability to navigate if you do not have focus on the tabs. In Firefox® and Internet Explorer®, these shortcut keys will not function if your focus is in a different area, including the Page Tree and the Additional Information Pane. This browser restriction does not apply to Chrome®.

Prevention of Manually Adding Invalid IDs to the Clipboard

The Clipboard no longer allows you to manually add invalid IDs. If you attempt to manually add an invalid ID, you will receive an error that indicates the ID is invalid and the ID will not be added to the clipboard. This new functionality only impacts manually adding IDs to the clipboard; it does not impact importing IDs to the clipboard.

Pasting Entity IDs to the Clipboard

Previously, if you pasted an entity ID number into the clipboard, Advance properly displayed the ID number in the clipboard. However, when the supporting clipboard database table was queried, the number was not stored correctly if it had the incorrect leading zeroes or if the ID contained a tab or space after the ID. This meant any query, Advance-provided or site-specific, would not function as expected when using this data.

When saving an ID list, Advance now stores the entity ID number in the applicable clipboard database table in the expected format, which means any Advance-provided or site-specific query or procedure written against the table will yield the expected results.

Pop-up Alerts

New Features and Functionality - Advance for the University of Arkansas

A new alerts pop-up appears when you access an entity's record for the first time in a session, if the entity has active alerts or special attention rules associated with their record. This pop-up aims to alert you to the fact that there's information about the entity that must be taken into consideration before proceeding.

This new pop-up displays Entity-based alerts, which are created and maintained via the Alerts form in Advance, as well as Rule-based alerts, which are created automatically by Advance when an entity meets criterion specified via the Rules Configuration window in the Advance Configuration Utility (Special Attention Rules). Rule-based alerts only appear when the rule has the Alert radio button selected.

When the pop-up alerts functionality is enabled by setting system option 33 to 1, Advance will display the pop-up the first time you access the entity's record. From that point forward during the session (until you log out and back in again), Advance will not display the pop- up. If you wish to display the pop-up after the initial pop-up is closed, you can click the red Attention hyperlink that appears on the various headers.

Entity-based alerts will display in the pop-up only when the alert is Active. The Entity-based alert pop-up is not dependent on whether the current date falls within the start and stop date parameters. Rule-based alerts will display in the pop-up as long as the entity meets the specified rule.

Reason Code Added to Alerts

The Reason Code field was added to the Alerts form. This field allows you to indicate the reason the alert was added to the entity's record. Values in this drop-down validate against tms_reason (ZL). This new field displays directly above the Message field.

Note: No database or view changes were made in conjunction with this new functionality since the tms_reason view and the reason code field (zz_alert_message.reason_code) were added in a previous release.

Staff Maintenance

A new Staff List application allows you to view a list of all staff members before accessing the Staff Maintenance form, where maintenance on staff records can be performed. By accessing this new intermediary page, you can view additional records prior to maintenance, as well as add new staff members via the New button. The Staff List can be accessed via Go To using the mnemonic STAFF (no ID number is required), and the Staff Maintenance application can be accessed for an entity via Go To using the mnemonic STAFFM, in which case an Entity ID must be provided.

New Features and Functionality - Advance for the University of Arkansas

Password length increased

The maximum password length (System Option 232) was changed from 12 to 18 characters.

Clipboard refinement

When loading a clipboard list, you can now enter in a keyword to find only those clipboards that contain that keyword. (The keyword uses the clipboard name to do this search.) You can also enter a keyword when using list headers so that only the list headers that contain that keyword are displayed in the list. A keyword search is helpful when there are a large number of saved lists.

Mailing List

Previously, duplicate fatal error messages were displayed if a list and stop date had the same value for a mailing list row.

Enhanced refresh of clipboard list

When you select an ID on any page of the *Clipboard* and return to *Clipboard* tab after viewing/closing other tabs, you can now see that the selected ID remains highlighted on the *Clipboard* page. Prior to this enhancement, the *Clipboard* page used to refresh and only the first ID was highlighted.

Added 'My Lists' to Load List

Added a new functional item, My Lists to the Actions menu of the Clipboard's *Load List* page. You can now select My Lists for any List type on the clipboard such as *Biographic*, *Allocation*, *Gift*, *Membership*, and so on. The My Lists item displays both the public and private lists created by the logged-in user.
Note: The My Lists of *Load List* is not same as My Lists of *List Headers*. This is because a filter is applied in My Lists of *List Headers* based on the last selected lists for private or public, which is not available in My Lists of *Load List*.

Clipboard refinement

Ability to Import external data into Advance clipboard.

You can now import an Alternate ID text file and show the linked Entity IDs on Advance clipboard. To import alternate IDs, an alternate ID code from the tms_ids_type table must be provided. In addition, the alternate ID number must exist in the ids_base table for that alternate ID type. The ID type is user defined and can be created in TMSC table.

F3 feature refinement

F3 shortcut for Allocations.

You can now use F3 to put another Allocation code on the Overview and Detail application on the Allocation Page without going through the lookup screen. It opens the same application page for the entered allocation.

F3 shortcut for other specific applications.

Additional F3 functionality is added for specific applications. You can now use F3 feature to enter different type of ID numbers in various applications. The F3 functionality is added to the Overview page for applications such as Dues Payment Profile, Event, Gift Profile, Matching Gift Profile, Membership, Pledge, Proposal, and Prospect and added to the Detail page for applications such as Contact Report, Contract/Grant, Event, Proposal, and Prospect.

Also, F3 functionality is added to Gift Update (Primary Gift Detail), Pledge Update (Primary Pledge Detail), and Matching Gift Update (Matching Gift Detail).

Lookup Refinements

Lookup by Name

The following fields in the Entity Lookup form were modified in order to allow you to more precisely locate entities (person and organizations) through the Entity Lookup application.

- The Last/Org Name field (name.lookup_last_name) was increased to 120 characters. Name.lookup_last_name was also updated to include both Org Name 1 and Org Name 2. Therefore, when performing a lookup for organizations by

name, Advance will now examine the names in the Org Name 1 and Org Name 2 fields to try to find the organization. Previously the lookup only used the Org Name 1 field when searching for organizations.

- The First Name field was increased to 60 characters.

New Features and Functionality - Advance for the University of Arkansas

Copy to Excel

The ability to copy the results of a lookup to Excel has been added for this release. However, this new functionality is not available for any of the lookups that use the entity lookup result set. The user still has the ability to use the Export Form option for those types of lookups.

Saved Criteria Refinements

The Saved Criteria form was refined in order to provide a more streamlined process for saving lookup criteria. When you save lookup criteria and check the Public check box:

- The name of the operator that created and saved the criteria list will appear in the list above the detail record. This value is not maintainable.

- The Owner User Group value in the detail record displays the User Group associated with the user that created the criteria list. This value can be modified.

Note: Rights must be established for each group you wish to allow access to the Criteria List. This can be established using the Rights form directly below the Saved Criteria List form.

Manual Entry and Display of TMS Codes

Users performing lookups can now manually enter a TMS code in a lookup field if they know the code. This applies to lookups in both standard and expert mode. If use of the drop-down is desired instead of manually entering the code, both the code and description will appear in the list with the description first, followed by the code in parenthesis, for example, 'Birth Name (BN)'.

In addition to displaying both the code and description when utilizing the drop-down lists, several drop-downs also now include the group code to which the value belongs, if a group code exists. Drop-downs that display the group code in addition to the code and description include the following:

Lookup	Lookup Field	View or Table Name

Awards and Honors Lookup	Award or Honor	tms_awd_honor
Committee Lookup	Committee	committee_header
Mailing List Lookup	List	tms_mail_list_code
Sports	Sport	tms_sports

Lookup	Lookup Field	View or Table Name
Student Activity	Activity	tms_student_act
Volunteer Activity	Volunteer Activity	tms_vol_activity

Preferred Email Added to Entity Lookup Result

The Entity Lookup Result set now includes the Preferred Email for the entity. When you perform a lookup that utilizes the Entity Lookup Result Set, and the entity has a preferred email, it will display on the Entity Lookup Result List directly below the entity's address and telephone information. If the entity does not have a preferred email, no information will display below the entity's address and telephone information.

Soft Credit Added to Giving Transaction Lookup Result

The Giving Transaction Lookup Result set now includes the Soft Credit amount associated with the transaction. When you perform a lookup that utilizes the Giving Transaction Lookup Result Set, the soft credit amount will display on the Gift Transaction Lookup Result List directly below the Amount on the transaction.

Looking up Contact Reports and Notes using Text

The Text field was added to the Contact Report and Note Lookups, which appear under the Prospect Tracking branch on the Lookups Page Tree. The new Text field allows you to search for Contact Reports and Notes that contain specific text in the Text field associated with the record. By default, the Text field in each of these lookups will have the operator set to 'Contains'. When you enter text in the Text field of either lookup and initiate the search, Advance will find the Contact Reports or Notes that contain the specified text string.

Sounds Like Logic Refinements

New Features and Functionality - Advance for the University of Arkansas

The Sounds Like check box on the Lookup Application allows you to search for entities whose Name (Last/Org, First, or Middle) matches the name entered. Previously, when performing an entity lookup using last name, if you checked the Sounds Like check box, Advance used the sounds like logic to find possible matches on the last name, however, if you also entered a first name or part of a first name, the lookup would use the 'Like' logical operator instead of the sounds like logic and the lookup might yield unexpected results.

In order to refine the sounds like logic, new fields were added to the Name database table. For additional information on schema changes, please refer to the Table Changes section of this document.

Note: For the sounds like logic to function for First Name or Middle Name, you must also utilize the Last Name field.

Look-up capability for Race/Ethnicity

Added Race/Ethnicity in *Lookups* to search entities based on Racial and Ethnic data. You can now select Race/Ethnicity in the *Bio Nav* tree of Look-up to open the *Race/Ethnicity* Lookup form. In the form, choose the desired Racial and Ethnic data by selecting Yes (Y) from the drop-down.

Look up Gifts using comments

Added Comment field as a criterion in *Gift*, *Matching Gift*, *Pledge*, and *Quick* Lookups to search for the matching results based on the comment you enter. In *Quick* Lookup, choose Gift transaction from Choose a template field for the Comment field to appear. The Comment field for *Gifts*, *Pledge*, and *Matching Gifts* is similar to the one in *Address* Lookup.

Entity - Deleted indicator

Added a new item, Deleted indicator = 'N' to the lookup Bio nav tree. The item is independent of the deleted indicator on the Bio quick lookup for entity. It is easy to enter the Delete indicator = 'N' by itself as a criterion in any lookup.

You can now select any criteria from the Navigation tree and select Entity - Deleted indicator as ‘Yes’ or ‘No’ to get the desired results. If you select ‘Yes’ it shows deleted Entities and if you select ‘No’ it shows non – deleted Entities. By default, ‘N’ is set as Entity-Deleted indicator.

Entity - Deleted feature can be used with any of the applications under Biographic, Event, Gift, Prospect Tracking, Membership, Resource, and Miscellaneous.
Lookup results are generated based on the values selected in both search criteria and Entity - Deleted indicator.

Biographic Refinements

Add Person and Add Organization Refinements

When adding a new person or organization entity, the Address Source, Address Start, Phone Source, and Phone Start fields now appear on the Add Person and Add Organization forms. Entering those attributes during the creation of the entity streamlines the entry process because the data entry operator doesn't need to access the Address and Telephone forms after the entity is created to enter this information, thereby saving time. All four of these new fields on the Add Person and Add Organization forms are optional during data entry. Values entered in the Address Source and Address Start fields will be visible on the Address Form after the record is saved, and values entered in the Telephone Source and Telephone Start fields will be visible on the Telephone Form after the record is saved.

In conjunction with these refinements, the Address Form was updated to include the Phone Source and Phone Start fields, when adding a new Address.

Note: Prior to this release, on the Address form, the Address Start and Stop dates were copied to the Telephone Start and Stop date fields.
This continues to occur in Advance 9.10.0. However, if you populate the Phone Start field, that data will be used for the Telephone Start date.

Add New Person with Employer and Job Title

When adding a new person along with their business address through the Add Person form, Advance now includes the Employer and Job Title fields for data entry. Previously, the Employer and Job Title information could only be added to the business address via the Address form after the new person record was successfully added.

Note: As with previous releases, System option 16 determines whether you can add a business address for a new person via the New Person form. When enabled, an end-user cannot add a new business address for a new person entity via the New Person form. Under these circumstances, all business address information must be added through the Address form. When disabled, Employer and Job Title information can be added along with the rest of the business address. When system option 16 is disabled, system option 40 must also be disabled.

New Features and Functionality - Advance for the University of Arkansas

Trailing Spaces in Entity Name

If a user enters one or more trailing spaces at the end of an entity name, the system now trims the trailing spaces.

Entity Duplicate Checking refinement

Added zip code and state fields to the existing matching fields. So, when you add a new entity, the duplicate entity function now performs duplicate check on the following fields.

1. Entity Person: First Name and Last Name (Existing functionality) or Entity Organization: Organization Name (Existing functionality)
2. Zip-code
3. State

In case of zip code, the duplicate entity function compares the first three digits of zip-code and shows the potential duplicate, if it matches with the existing record; otherwise, it creates a new entity.

Entity Detail Refinements

The process of entering and maintaining information on the Add Person, Add Organization, and Entity Details forms was refined to allow you to enter data more efficiently. As part of this refinement:

- Name fields on the Add Person and Add Organization forms were re-organized and are now grouped together in a more logical fashion to help improve productivity during the entry process.

- Email and eContact information can now be added directly on the Add Person and Add Organization forms at the same time when you create the entity. This aims to eliminate the need to toggle back and forth between multiple forms.

- A new check box on the Entity Detail form named Rebuild Name Fields allows you to indicate you want the Mail Name, Report Name, and Salutation values to be re- built automatically if a change is made to the name fields on the form. This aims to help save the steps of blanking out the name fields manually, especially if the prior names were automatically generated and not manually entered.

- New hyperlinks in the helpful text header on the Entity Detail application provide quick access to the following forms: Address, Record Type, Bio Detail, Degrees, Email, Employment, Marital Info, and Telephone. These hyperlinks appear after a new record is created and saved or when you access the record of an existing entity. Previously, only the Address and Record Type hyperlinks appeared in the helpful text section.

Telephone Hyperlink on Entity Overview

The Contact Information form on the Entity Overview application now displays the entity's telephone number(s) as hyperlinks. When you click a telephone hyperlink on the Entity Overview, Advance will navigate you to the Telephone form.

Adding Alternate Names for Organizations

Advance utilizes a new process to identify whether an alternate name already exists for an organization. When you attempt to add a new alternate name for an existing organization entity, Advance will now check the 'org long name 1' and 'org long name 2' fields to determine whether the name already exists for the organization, for the specified name type. Using these specific fields decreases the likelihood of Advance inadvertently flagging the name as a duplicate, and presenting the user with an invalid error message, when the name is not a duplicate.

Mail Name Generation Method

System option 17 contains three new values that allow you to determine how Advance will generate mail names. With these new values, you can optionally suppress the comma preceding a suffix in the Mail Name field when adding a name with a personal suffix, but not when adding a professional suffix. For example, generate a mail name of 'John Doe III' and 'John Doe, PhD', but not 'John Doe, III'.

In addition to the existing five values in system option 17, the following values are now available:

Option Value	Description

6	If professional suffix is non-blank, set mail name to: first name + middle name + last name + personal suffix + , + professional suffix (Sam Albert Brown Jr., MD) If professional suffix is blank, set mail name to: prefix + first name +
7	If professional suffix is non-blank, set mail name to: first name + middle initial + . + last name + personal suffix + , + professional suffix (Sam A. Brown Jr., MD)
8	If professional suffix is non-blank, set mail name to: first name + middle name + last name + personal suffix + professional suffix (Sam Albert Brown Jr. MD) If professional suffix is blank, set mail name to: first name + middle

Same Home Address and Telephone Refinements

The Marital Information form now allows you to check the 'Same Home Address' and/or 'Same Home Telephone' check box on a marital record, even if neither spouse has a home address or home telephone record, respectively. These two check boxes work independently and you can check one without the other. This new behavior occurs in order to allow you to check the box when you know the two spouses share the same home address and/or home telephone information, but you do not know the address or telephone number. Previously, an error occurred when you tried to check either of these boxes when neither spouse had that type of data.

Address, Phone, and Email on Organization Contacts

New fields and functionality on the Org Contacts form allows you to link additional attributes to the org contact record. Changes to the Org Contacts form are as follows:

Field	Description

Address Link/Address	When an Entity ID is specified in the Contact ID field, the Address Link drop-down appears. This drop-down allows you to select an address that's associated with the contact specified in the Contact ID field. When an Entity ID is not specified, making it a name-only contact, the Address Link field will only display the address records associated with the organization. Regardless of whether an ID is specified in the Contact ID field, you can manually enter the address in the Address text field that displays directly below if a value is not selected from the Address Link drop-down. In previous releases, the Phone information also displayed with the address in inquiry-only mode when the address was selected from the drop-
Phone Link/Phone	When an Entity ID is specified in the Contact ID field, a new Phone Link drop-down appears. This drop-down allows you to select a phone number that's associated with the contact specified in the Contact ID field. When an Entity ID is not specified, making it a name-only contact, the Phone Link field will disappear. Regardless of whether an ID is specified in the Contact ID field, you can manually enter the phone number in the Phone field that displays directly below if a value is not
Email Link/Email	When an Entity ID is specified in the Contact ID field, a new Email Link drop-down appears. This drop-down allows you to select an email address that's associated with the contact specified in the Contact ID field. When an Entity ID is not specified, making it a name-only contact, the Email Link field will disappear. Regardless of whether an ID is specified in the Contact ID field, you can manually enter the email address in the Email Address field that displays directly below if a value is not selected

Adding New Employment Records with Address Information

A new field on the Employment form named Address Link allows you to associate an existing address record with an employment record at the same time you add the new employment record. When you enter the Entity ID of the employer in the Employer field and navigate away from the field, the new Address Link drop-down field will appear. Since the new drop-down displays addresses for the Employer in the Employer field, this new field only appears when the employment record is ID-based. The field will not appear if the employment record is name-only (no ID is present in the Employer field).

When the Address Link drop-down is selected, active business address records for the employer will appear. Information in the drop-down includes the physical addresses, address type, and preferred indicator to help you ensure you're selecting the correct value. If the entity already has an existing business address and you select a value from the new drop-down, a prompt will appear when you click Save. The prompt allows you to indicate whether you wish to use the existing business address (the address on the left), or use the business address associated with the new employer (the address on the right). Selecting the address on the right will cause Advance to create a new business address record for the entity and have the address linked to their employment record. After you check the (one) applicable box, click Save. If you do not check either box, Advance will use the organization's address.

Click Save without Address Link to save without linking an address. After the record is saved and you return to the employment record at a later time, the Address Link will not appear, as the field only applies to adding new employment records.

Advance will not create duplicate address records. If an existing address is selected in the left column, Advance will only link the employment record to the existing address.

If a business address exists for the entity and an address is selected from the right column, the entity's business address will be moved to a past business address. Advance will not end or replace any other existing addresses. If you wish to update any other address information, you can click the new Address hyperlink, which appears directly to the right of the new Address Link field. Clicking this hyperlink will access the Address form for the current entity.

School, Division, and Department Defaults on Local Degrees

When adding a new local degree or working with an existing local degree on the Degrees form, if system option 7 is enabled, Advance now automatically defaults the School, Division, and Department codes associated with the selected Major (in the Major 1 field). School, Division, and Department defaults are established for each Major code via TMS Majors view (tms_majors).

- When a new local degree is added, the School, Division, and Department codes associated with the selected Major will automatically default into their respective fields.

- When updating an existing local degree, if the Major code is changed, and the default School, Division, or Department values associated with the newly selected major do not match the existing values, a message will appear for each code that does not match. The message will prompt you to indicate whether you wish to keep the existing values (Cancel) or use the defaults associated with the new major from tms_majors (OK).

- When updating an existing local degree, if you manually change the School, Division, or Department value to one that does not match the default for the major (in tms_majors), a message will appear for that value. The message will prompt you to indicate whether you wish to keep the existing value (Cancel) or use the default associated with the newly selected code from tms_majors (OK).

Modifying Employment Information

When a name-only employment record exists for an entity, and you access the Employment form and enter an ID Number in the Employer ID field, Advance will now automatically blank out any values from the Employer Name 1 and 2 fields.

Primary Indicator on Marital Information

A new series of radio buttons on the Marital Information form allow you to indicate which spouse on the marital record is considered primary. When a joint gift or joint pledge is entered, and the ID number of the non-primary spouse is entered, Advance will display a warning message indicating the ID number is not primary on the marital record. The message will also indicate the ID number of the primary spouse. These radio buttons only appear when the Spouse ID is entered on the Marital Information form (i.e., the marital record is an ID-based record, not a name only marital record). Radio buttons include the following:

Radio Button	Description
Entity ID is Primary	The current entity is primary during entry of joint gifts and pledges.
Spouse ID is Primary	The spouse of the current entity is considered primary during entry of joint gifts and pledges.
Neither	Neither spouse is considered primary during entry of joint gifts and pledges.

System option 391

The Primary indicator is controlled by a new system option (391), which allows you to enable or disable this functionality. By default, this new system option is disabled and the buttons will not appear and the validation logic during joint gift and pledge entry will not occur. System option 391 must be enabled in order to utilize this functionality.

Marital Status Changes

If you add a new marital record with a spouse ID number, you have to set the primary indicator on the new marital relationship.

Marital Status Prompt when Adding a Former Spouse

A new prompt on the Former Spouse form allows you to indicate the status of the former spouse record for the spouse entity when adding a new former spouse row. This functionality applies to ID-based marital information records and does not apply to name- only marital records.

After you enter the spouse ID number of the former spouse on the Former Spouse form and navigate away from the field, the prompt will appear and allow you to select the former marital status code for the entity. The drop-down displays values from the former spouse view (tms_marital_status, BN). By default, the value of F (Formerly Married) will be selected, and you can modify the value as necessary. If you Cancel or Close the prompt, or select a value of None from the drop-down, Advance will use the marital status code you select for the current entity on both former spouse records, which is the logic utilized in previous releases.

Joint Salutation Generation

A new system option (390) allows you to specify what format Advance will use when automatically creating a joint salutation on the Marital Information form. This new option has three settings:

1. First Names – When this value is selected, the joint salutation is generated using the first names of the spouses. The connector ('&' or 'and') is controlled by system option 26. The joint salutation is generated by using the male name first followed by the female name. If both entities are the same gender or if both of the entities do not have a gender, the order of the first names is not specified. If either of the first names is not populated, the joint salutation will not be generated and it must be added manually. For example, when system option 26 is set to 'and', the name would be generated as 'Jon and Mary'. If system option 26 is set to '&', the name would be generated as 'Jon & Mary'.
2. Last Names – When this value is selected, the last name of the couple is used.

- When the last names are the same, the connector separates the prefixes. The connector is controlled by system option 26. If the prefix for either entity is not populated, the salutation will not be built. If the entities both have prefixes, but neither of the entities have a gender, the salutation will not be built and an error message will appear and the data entry operator will have to manually enter the joint salutation. The full format of the joint salutation using this value under these circumstances is Prefix + Connector + Prefix + Last Name. For example, ‘Mr. and Mrs. Jones’ or ‘Mr. & Mrs. Jones’.

- When the last names are not the same, the connector separates the prefixes. The connector is controlled by system option 26. If the prefix for either entity is not populated, the salutation will not be built. If the entities both have prefixes, but neither of the entities has gender, the salutation will not be built and an error message will appear and the data entry operator will have to manually enter the joint salutation. The full format of the joint salutation under these circumstances is Prefix + Last Name + Connector + Prefix + Last Name. For example, ‘Mr. Popper and Mrs. Smith’ or ‘Mr. Popper & Mrs. Smith’.

- When the last names are the same, for example Smith, and both are doctors, with the prefix of Dr., the joint salutation would be ‘Drs. Smith’. This specific logic only applies to the Dr. prefix.

3. Original Logic – When this value is selected, Advance will function as in previous releases. If the spouses have a different last name, the default joint salutation will be the prefix and last name of the entity plus the prefix and last name of the spouse, for example, ‘Mr. Jones and Dr. Smith.’ The connector is controlled by system option 26. If the spouses have the same last name, the default joint salutation will be the prefix of the entity plus the connector plus the prefix of the spouse entity. For example, ‘Mr. & Mrs. Jones’.

Date Modified Added to Contact Information Form

The Contact Information form, which displays on the Entity Overview as well as in a few other locations, was enhanced to include additional address information. The date on which the address was last modified now appears directly below the address and directly above the telephone number(s). This applies to all addresses that appear on this form, including Home and Business addresses. Providing this information on the Entity Overview as well as other locations where the Contact Information displays allows the end-user to view that information quickly and determine how recently the address was updated without the need to drill-down to the Address form.

New Features and Functionality - Advance for the University of Arkansas

Change Source Added to Marital Information, Employment, and Mail Control Forms

The Change Source field was added to the Marital, Employment, and Mail Control forms and lookups. This field allows you to specify the source of information that provided the update to the record. Values in this drop-down validate against the Change of Source TMS view (tms_change_source, GU).

- Change Source was added to the following Marital Information locations:
  - Marital Information
  - Marital Information Lookup
  - Entity Update
  - DataLoader
  - Entity Profile Report
- Change Source was added to the following Employment Information locations:
  - Employment
  - Employment Lookup
  - Entity Update
  - DataLoader
  - Entity Profile Report
- Change Source was added to the following Mail Control locations:
  - Mail Control
  - Mail Control Lookup
  - DataLoader
  - Entity Profile Report

New Features and Functionality - Advance for the University of Arkansas

Note: The change source field was added to the applicable database tables in order to support this new functionality. For additional information on table changes, please refer to the Table Changes section of this document.

Comment Field Expansion

The Comment field on the following forms and tables was increased from 255 to 2000 characters.

Form Name	Form ID	Table Name
Address	80010	address
Degrees	80097	degrees
Email	80901	email
Employment	80109	employment

Form Name	Form ID	Table Name
Entity	80790	entity
Entity New	90319	entity
Entity (for Organizations)	80789	entity
Organization New	90320	entity
Telephone	96025	telephone

Note: In addition to the tables referenced above, there are additional tables that were updated in conjunction with this enhancement, which do not have a corresponding form. For a complete list of table changes, please refer to the Table Changes section of this document.

Contact Name and Title Expansion in Contact Table

New Features and Functionality - Advance for the University of Arkansas

The contact name and title fields in the Contact table (Org Contacts form) were increased from 40 to 120 characters.

Home Phone in Contact Information

The home phone number is now displayed in the **Contact Information** section of the Entity Overview form even if there is no address data for the entity record.

You can now include a link to your LinkedIn page on the Entity Overview form. To do this, you need to generate a custom URL in LinkedIn and enter this value in the **eContact** field of the eContact form.

Allocation Alerts

You can now add an alert for an allocation on the new Allocation Alerts page. You must first access the allocation, then click Alert on the navigation tree.

Note: Allocation alerts are not added using the Alerts and Messages functionality.

The system displays the alert only the first time a user accesses the allocation after the alert is added. To view the alert again later, that user must access the allocation record on the Allocation Detail form and then select Alerts from the navigation tree.

When system option 31 is turned on, both entity and allocation alerts are enabled. As with entity alerts, only active alerts are displayed.

To double-check that a newly added alert is displayed properly, a user can log out of Advance and log back in, then access the allocation.

Telephone Start Date auto-populates when adding a new Entity

When you create a new entity with a Telephone Number using *Add Person* or *Add Organization*, the Telephone Start Date now automatically updates with today's date. This is similar to the Start Date for *Address* and *Email.*

Email Stop Date auto-populates when making an Email Past

When the Email type of an existing email record is changed from a *Current* type to a *Past (non-current) Email* type, the Stop Date now automatically updates to today's date. It also unchecks the Preferred check-box, if it was a preferred email address. This is similar to the Stop Date functionality in *Address* and *Email* forms, where it updates automatically.

Added Comment column for DataLoader ID data

Added support for the Comment field when loading Alternate ID data using the DataLoader data.
Note: You can add but you cannot modify or delete Alternate IDs using DataLoader.

Enhanced drill down on Messages

When you select a message on the home page, the *Message* page now displays only the selected message instead of a list of messages.

Added a prompt message to update joint name when primary name changes

When you attempt to change the primary name of a married entity having a spouse ID, you now get a prompt message – *Do you also want to update Joint Mailing Name and Joint Salutation?* When you select OK, it updates the Joint Mailing name and Joint Salutation in *Marital Info* page of entity and spouse along with the Primary name, or if you select Cancel, it updates only the Primary name.

Entity Update Refinements

Telephone, Address, Email, and Employment

Changes to Entity Update provide a new streamlined approach to add and/or modify telephone, address, email, and employment information. When system option 260 (Use DataLoader for Updating Entity Records) is enabled, new forms allow you to work with telephone, address, email and employment information. Changes to these forms in Entity Update include the following:

- Home Address and Business Address were consolidated and now display on the Page Tree as a single link labeled Address. The type of address can be selected from the Address Type drop-down, which now appears on the form.

- Home Telephone, Business Telephone, and Other Telephone were consolidated and now display on the Page Tree as a single link labeled Telephone. The type of telephone can be selected from the Telephone Type drop-down, which now appears on the form.

- When you select an attribute from the Entity Update Page Tree, Advance will assume you wish to add a new record for that attribute and text will appear at the top of the detail form to indicate 'This is a new record'. To proceed with adding a new record for that attribute, enter the information and click Save.

- A new form in the right-pane displays records that were added or modified through the Entity Update application, which have not yet been processed by DataLoader and are still in the temporary DataLoader holding tables. This new form displays on the top of the right-pane and is named 'New/Updated xxx', where xxx represents the type of data (Telephone, Address, Email, or Employment), for example, 'New/Updated Telephone'. A count of records displays to the right of the form header name.

- If you wish to modify an existing row, you can select the record that you wish to modify using the right-pane, which displays records for the selected type of data (telephone, address, email, and employment) in the 'New/Updated' form. Since Advance assumes you are adding a new record when you select the type of data from the Page Tree, if you immediately select an existing record from the right-pane in order to update the existing record, Advance will display a message indicating your changes have not been saved if there are required fields on the form. If this message appears, click OK to acknowledge the message and the details for the selected record will appear. When you are modifying existing data, text will appear at the top of the detail form to indicate 'You are modifying an existing record'. Click Save when you are done modifying the existing record.

- A hyperlink appears directly above the 'New/Updated' form in the right-pane. This hyperlink changes depending on whether you are current on Telephone, Address, Email, or Employment information. When you click this hyperlink, Advance will open the form for that type of data, where you can add or modify information as appropriate. For example, if you are current on the Employment branch of the Entity Update Page Tree, the hyperlink will display the word Employment, and the Employment form will open when you click the hyperlink.

- Helpful text that appears in the Entity Update application header was modified to include instructions on how to work with the revised forms.

- DataLoader will automatically create the Add or Modify operation as appropriate.

- o When you select a telephone or address from the Current Telephones or Current Addresses list and the type is home or business, the update will be created as an Add. Once in DataLoader, the Add can be changed to a Modify if applicable.

- o When you select a telephone or address from the Current Telephones or Current Addresses list and the type is not home or business, the update will be created as a Modify in DataLoader.

o When you select an email or employment record from the Current Emails or Current Employment lists respectively, the update will be created as a Modify in DataLoader.

Status, Original Source, and Change Source

New fields on the Telephone, Address, Email, and Employment forms allow you to specify the Status, Original Source, and Change Source values. These fields appear on these forms regardless of whether DataLoader is used to review the changes (i.e., system option 260 is enabled or disabled).

Operator Name on Entity Updates

Previously, when system option 260 was enabled and updates were sent to DataLoader from Entity Update, Advance associated the operator name of the user that created the batch with the individual transactions in the batch. While helpful in determining who created the batch, it didn't allow the person reviewing the information in DataLoader to determine how to proceed if they had any questions about the individual rows that needed to be processed.

Advance now associates the operator name of the user that added or modified the information through Entity Update with the individual rows instead of the operator name of the person that created the batch. When the user reviewing the information in DataLoader views the individual transactions via the DataLoader Batch - Transaction List form, the name of the operator that added or modified the information displays, which allows the reviewer to determine whom to contact if they have any questions before processing the row.

Entity Update Email Option

When system option 260 is disabled, a new system option (399) allows you to determine whether all fields on the Entity Update application will be included in the email sent to the designated recipient to process the changes, or whether only the fields that contain modifications made through Entity Update will be included in the email. The addition of this system option aims to increase productivity as it will allow the person reviewing the information to easily determine what changed without having to refer back to the entity's record to manually compile that list prior to processing the changes.

Other Addresses and Additional Emails

Additional fields have been added to the existing Entity Update form to allow you to add additional addresses (not Home or Business) as well as additional email records. These changes appear when system option 260 (Use DataLoader for Updating Entity Records) is disabled. These new fields consist of the following:

- Other Addresses – The fields that display in this section are the same as the Home Address section of this form. The only exception is that an additional field named Address Type, which allows you indicate the type of address to which the record applies, displays in this new section.

- Email 2 / Email 3– The fields that display in this section are the same as the Email 1 section.

Entity Merge Utility and Entity Merge and Purge Utility Refinements

Purging Entities and Related Reversal Data

Previously, if you attempted to purge an entity manually through the zz_entity_purge process (system option 400 = N), Advance would not purge the entity if they had data in the reversal tables. Additionally, if you attempted to purge an entity automatically through the Entity Merge and Purge process (system option 400 = Y), Advance would purge the entity, however the rows in the reversal table would still reflect the donor ID of the entity that was purged, thus creating orphaned data (rows existed in the reversal tables where there was no Entity with that ID number).

In order to alleviate both of these scenarios, a new field was added to numerous Advance database tables. When an entity is merged or purged, the Entity ID of the entity being purged (not the entity being merged), will be placed in this new field in order to retain the audit trail of the entity to which the reversal originally applied. The ID of the entity being merged will then be placed in the Entity ID field.

Additionally, since the process creates Gift and Membership transactions to move the data from one entity to another, the following reports were updated to include the new purge ID number in order to make it easier to see the ID number of the entity that was merged and/or purged.

Giving Summary Reports:

- Gift and Pledge Transaction List with Audit
- Gift and Pledge Transaction List with Corp Totals/Audit
- Gift and Pledge Transaction List with Spouse/Audit
- Matching Gift Transactions with Audit
- Matching Gift Transactions with Corp Totals/Audit
- Pledges/Payments with Audit Membership Summary Reports:
- Membership List with Audit
- Membership List with Spouse/Audit

- Membership Payment List with Audit
- Membership Payment List with Spouse/Audit
- Membership Transactions with Audit
- Membership Transactions with Spouse/Audit

DataLoader Refinements

Race and Ethnicity Template

A new DataLoader template allows you to modify race and ethnicity information using DataLoader. This new template does not apply to adding or deleting race and ethnicity information. For additional information on using DataLoader, please refer to the *Advance DataLoader User Guide*.

In conjunction with this new template, the Race and Ethnicity form in Advance was modified. The Hispanic or Latino option, previously a radio button, is now a check box.

- Checking this box when the Race & Ethnic Unknown check box is checked will cause the Race & Ethnic Unknown check box to be automatically unchecked.
- Un-checking the Hispanic or Latino check box when no other boxes are checked will cause the Race & Ethnic Unknown check box to become checked.

Exclude Warnings on DataLoader Batch Error Log

The DataLoader Batch Error Log form includes a new option that allows you to filter warnings from the Error Log in order to easily identify errors, which may require action, as opposed to warnings that can be ignored.

When you access the DataLoader Batch Error Log form, warnings and errors both appear in the list. As in previous releases, warnings are noted with an asterisk. To filter the Error Log and remove warnings and only display errors, select Exclude Warnings from the Actions Menu. To add warnings back to the list, select Include Warnings from the Actions Menu. If you close the Error Log form, the filter will automatically reset back to Include Warnings regardless of the setting when the form was closed.

DataLoader Batches that Fail Creation

Previously, if the DataLoader batch creation process failed, the batch didn't appear in the DataLoader Batch List, and the entry operator was unaware of the failure. Since the entry operator was uninformed of the failure, the operator might continue to refresh the screen under the assumption that the batch creation process was still running and their batch would appear shortly. The only way to know about the failure was to query the adv_log_exceptions table and the event viewer on the web server where Advance is installed.

Advance now displays the batch in the batch list with a status of 'Processing' while it is being created and failed batches appear in the batch list with a status of 'Failed'. If the batch is created successfully it appears with a status of 'Open' as in previous releases. This helps entry operators confirm the batch creation process is working, and when a failure is encountered.

Note: Although it is still necessary to refresh the screen to see when the process is complete, this improvement allows you to see if the batch creation failed or succeeded, instead of waiting indefinitely to see if the batch was created.

When working with the new batch upload process:

- The batch now appears in the Batch List as soon as the batch creation process is initiated, and the batch appears with a status of Processing (P).
- After the batch creation process is complete, the status changes to Open (O) or Failed (F), as appropriate.
- The Failed status appears as a hyperlink, which if clicked, displays the error that caused the batch to fail.
- Batch validation and post utilize the same process, and the batch appears with a status of Processing (P). When the validation or post is complete, the status will either retain the batch status set by the process (e.g., Post automatically sets the status to Complete if the batch is complete), or set the status back to the value before the process began.
- When you select a batch from the Batch List application, you will be navigated to DataLoader - Batch Maintenance instead of the Batch Overview.
- If the status of the batch is failed, you can modify any attributes of the batch header row, except the status.
- If you attempt to manually set the batch status of a batch to Failed, an error will appear and the Save will not occur because Failed is a

system-reserved value and will only be assigned by Advance. The same is also true for selecting the Processing status.

- When you access the Batch Maintenance form for a failed batch, Validate and Post do not appear on the menu.
- If you select a failed batch from the Batch List, the Transaction List, Error Log, and Mass Update Summary Report branches will not appear on the Page Tree.
- The following Alternate ID errors are no longer captured in adv_log_exceptions, but will be reported if you click the Failed status hyperlink:
  - Alternate ID selected but not specified in file/table.
  - Alternate ID not selected but specified in file/table.
  - Alternate ID in file/table does not match selected Alternate ID.
- Database errors that occur during regular batch creation continue to be captured in adv_log_exceptions. The batch header will be created with a Failed status, and a message stating an error occurred when creating the batch will appear along with some information about the error.
- If an error occurs during the creation of a Mass Update batch, you will be navigated to the Batch List where you can view the error.

Required Field Indicator in DataLoader Batch Metadata Maintenance

A new field in the DataLoader Batch Metadata window in the Advance Configuration Utility displays inquiry-only information that indicates whether the information is required for additions, modifications, and deletions. This information is particularly useful when paring down custom DataLoader transformations, thereby enabling you to create smaller files and tables from which to load. In turn, this enables you to more easily create different transforms for adding, modifying and deleting data from the same table. If you use the same transformation for add, mod, and delete, all you need to determine is whether the value is N or something other than N.

This information displays in a new field named Required Info, which displays to the right of the Xref Type field in the DataLoader Batch Metadata window. Each column contains one of the following values:

- AMD - Required for Add, Mod, Delete
- AM - Required for Add, Modify
- A - Required for Add
- MD - Required for Mod, Delete
- M - Required for Mod
- Conditional - Required under certain conditions. For additional information, please refer to the Data Elements documentation.
- N - Not required

Gift and Pledge Refinements

Bi-Weekly, Weekly, and Bi-Monthly Pledge Payments

New payment frequencies allow you to enter pledges and establish payment schedules that reflect bi-weekly, weekly, and bi-monthly payments. When a gift entry operator adds a new pledge and selects one of these three new payment frequencies, Advance will automatically generate a payment schedule that reflects that frequency.

The process of entering bi-weekly, weekly and bi-monthly pledges is the same as adding pledges with frequencies present in previous releases. The only difference is selecting one of these new frequencies from the frequency drop-down during pledge entry.

Bi-Weekly Payments

A bi-weekly payment occurs every two weeks. When this frequency is selected a payment schedule will be created based on the Pay Date. For example, a 4800.00 pledge with bi- weekly payments of 200.00 with an initial payment date of January 1, 2014 will have 24 payment schedule rows, where the first few schedule rows look like the following:

Payment (Scheduled Due Date)	Status	Amount (Payment Due)	Balance (on this Payment)
January 1, 2014	Unpaid	200.00	200.00
January 15, 2014	Unpaid	200.00	200.00
January 29, 2014	Unpaid	200.00	200.00
February 12, 2014	Unpaid	200.00	200.00

Weekly Payments
A weekly payment consists of one payment every week. When this frequency is selected a payment schedule will be created based on the Pay Date. For example, a 5200.00 pledge with weekly payments of 100 with an initial payment date of January 1, 2014 will have 52 payment schedule rows, where the first few schedule rows look like the following:

Payment (Scheduled Due	Status	Amount (Payment Due)	Balance (on this Payment)
January 1, 2014	Unpaid	100.00	100.00
January 8, 2014	Unpaid	100.00	100.00
January 15, 2014	Unpaid	100.00	100.00
January 22, 2014	Unpaid	100.00	100.00
January 29, 2014	Unpaid	100.00	100.00

Bi-Monthly Payments

A bi-monthly payment occurs twice a month. When this frequency is selected a payment schedule will be created based on the Pay Date. The value of the payment dates can vary paying on the 1st and the 15th of the month, or the 15th and the last day of the month. If the Pay Date begins on the first of the month, the schedules will be created for the 1st and
15th, otherwise, the schedules will be created on the 15th and end of month.

For example, a 4800.00 pledge with bi-monthly payments of 200.00 with an initial payment date of January 1, 2014 will have 24 payment schedule rows, where the first few schedule rows look like the following:

Payment (Scheduled Due	Status	Amount (Payment Due)	Balance (on this Payment)
January 1, 2014	Unpaid	200.00	200.00
January 15, 2014	Unpaid	200.00	200.00
February 1, 2014	Unpaid	200.00	200.00
February 15, 2014	Unpaid	200.00	200.00

For example, a 4800.00 pledge with bi-monthly payments of 200.00 with an initial payment date of January 15, 2014 will have 24 payment schedule rows, where the first few schedule rows look like the following:

Payment (Scheduled Due	Status	Amount (Payment Due)	Balance (on this Payment)
January 15, 2014	Unpaid	200.00	200.00
January 31, 2014	Unpaid	200.00	200.00
February 15, 2014	Unpaid	200.00	200.00

Payment (Scheduled Due	Status	Amount (Payment Due)	Balance (on this Payment)
February 28, 2014	Unpaid	200.00	200.00

Open Ended Payment Schedules

Open-ended pledges are pledges where the amount of each payment and the frequency of the payments are known, but the total amount pledged is not known because there is no end date. Open ended pledges now have the frequency options of bi-weekly, weekly and bi-monthly. The same logic is used to generate the schedule as outlined in the sections above and they will reflect one calendar year with a month and a day and no year.

Note: Since open ended pledges do not have a year component, February will always end on the 28th for those schedules that are created for end of the month.

Open-ended bi-weekly payment schedule example:

Payment (Scheduled Due	Amount	Balance (on this Payment)
January 1	200.00	
January 15	200.00	
January 29	200.00	
February 12	200.00	

Open-ended weekly payment schedule example:

Payment (Scheduled Due	Amount (Payment Due)	Balance (on this Payment)
January 1	100.00	
January 8	100.00	
January 15	100.00	
January 22	100.00	
January 29	100.00	

Open-ended bi-monthly payment schedule example:

Payment (Scheduled Due	Amount (Payment Due)	Balance (on this Payment)

January 1	200.00	
January 15	200.00	
February 1	200.00	
February 15	200.00	

Gift Pledge Loader

Gift Pledge Loader helps you load financial transactions from an external source into Advance. Through the use of Gift Pledge Loader, you have the ability to load these bi-weekly, weekly and bi-monthly financial transactions into the Advance batch tables, which can then be reviewed and submitted for gift processing.

Electronic Fund Transfer Payment for Pledges

When generating pledge payments through the zz_build_eft_payments stored procedure, Advance will automatically generate the payment schedules using the new payment frequencies (Weekly, Bi-Weekly, and Bi-Monthly).

Pledge Reminders

Advance will display these new payment frequencies (Weekly, Bi-Weekly, and Bi-Monthly) on the pledge payment reminders report when the zz_pledge_reminders stored procedure is run. Pledge Reminders listed on this report are the next two reminders based on the next two unpaid scheduled dates greater than the date that the zz_pledge_reminders procedure is run.

Additional Security Details

Previously, when you entered a new gift and selected a Tender Type of Securities, the Tender Details form appeared below and you could enter values in the NPV, Memo, Cover, and Deduction fields. Since the Amount and Tender Type were selected above, these fields displayed in this form in inquiry-only. Next, when you clicked the Securities hyperlink to add additional attributes of the securities record, none of these fields appeared in the Securities Details form.

Now, when you access the Security Details form by clicking the Securities hyperlink, the Amount, Tender, NPV, Memo, Cover and Deduction fields all appear in inquiry-only. If you determine any of these fields need to be modified, you can do so via the Gift Entry form (Amount and Tender) or the Tender Details form (NPV, Memo, Cover or Deduction).

New Features and Functionality - Advance for the University of Arkansas

Check Number Expansion

The check number field, used during entry and maintenance of financial transactions, was increased from 10 to 30 characters. In order to accommodate this expansion, the check number field on all financial entry and maintenance forms was increased in order to display the expanded field length and the check number field in all applicable database tables was increased from 10 to 30 characters. For additional information, please refer to the Table Changes section of this document.

Next Payment Balance on Scheduled Payments Overview

A new field on the Scheduled Payments header, named Next Payment Balance, displays the balance due on the next scheduled payment. This may be the same as, or less than, the Next Payment Amount, which displays directly above. If a pledge payment includes the scheduled payment as well as part of the next scheduled payment, this new field will indicate the Next Payment Balance (Next Payment Amount - Overpayment = Next Payment Balance), which is less than the Next Payment Amount because of the overpayment.

Audit Trail Display for Reversals

Gift and pledge transactions that were reversed now display on the Giving Views application with the word Reversal, in red and italics, at the top of the transaction record, in order to provide a clear indication to the end-user that the transaction was reversed.
Reversal transactions are displayed on the Giving Views form when you are current on an
entity that has reversed transactions, and when you select a view that includes Audit Data, such as Transaction List with Audit or Pledges/Payments with Audit.

Giving Views

A new entry in Go To allows you to navigate directly to the Giving Views application. The Go To entry is named Giving Views and has a mnemonic of GVIEWS. Previously, the Giving Views application could be accessed by navigating to the Giving Summary form and using the Page Tree to navigate to the Giving Views application.

As with previous releases, the Giving View that displays by default is specified using the Advance Configuration Utility. For additional information on specifying a default gift report type, please refer to the *Advance Configuration Examples* document.

Reason Changed Date Added to Transaction List with Audit Giving Views

The Reason Changed Date field was added to the Transaction List with Audit, Transaction List with Spouse with Audit, and Transaction List with Corp Totals with Audit giving views. This field displays the date on which the transaction was reversed or modified.

In conjunction with this addition, the Reason Changed and Reason Changed Date fields were added to the Pledge Reversal Overview form.

Allocation Code Added to Matching Gift Transaction Views

The Allocation Code field was added to the Matching Gift Transaction and Matching Gift Transaction with Audit views. This field indicates where the funds from the matching gift were allocated. The allocation code displays as a hyperlink, which when selected, will take you to the Allocation Profile for the selected code.

Copying Gift Club Information to the Clipboard

When working with a list of gift clubs for an entity, you can now copy the entity ID number and/or gift club information to the clipboard. Previously, only the entity ID number could be copied to the clipboard.

Covered by Accounts

A new form named Covered by Accounts allows you to view a list of entities that cover the selected entity when making financial transactions. After you access the new Covered by

Accounts form, you can select the entity that covers the current entity and drill-down on the row to access the Covering Accounts form to view the details. The new Covered by Accounts form is accessible by selecting Covered by Accounts from the Biographic Page Tree or via Go To.

For example, if Harry Lincoln is covered by the Lincoln Family Foundation, and you access the new Covered by Accounts form for Harry Lincoln, you will see the Lincoln Family Foundation in the list, as they cover Harry. Drilling-down on that row will access the Covering Accounts form for the Lincoln Family Foundation, which will include an entry for Harry. If you access the Covering Account form for the Lincoln Family Foundation directly from the Biographic Page Tree or Go To, you will see an entry for Harry Lincoln.

Covering Account Logic Added to EFT Payments

Covering account logic was added to the EFT Payment build process (zz_build_eft_payments). If a pledge contains an ID number that also has covering account data, the covering account donors will be added to the pledge payment and the percentage from the covering account data will be utilized.

Performance Improvement on Gift Tender Type

A new index was added on the receipt_number field in the gift_tender_type table. This new index aims to increase performance when accessing the Giving Views application for entities that have more than 30 gifts.

Gift Pledge Loader Refinements

Loading Open-Ended Pledges

Gift Pledge Loader now supports the loading of open-ended pledges. Open-ended pledges are pledges where the amount of each payment and the payment frequency are known, but the total amount pledged is zero since open-ended pledges do not have an end date and the total cannot be calculated. For example, if a payment frequency of monthly is indicated (because the pledge is a payroll deduction pledge) along with a payment amount of 25, Advance will generate twelve schedules for the year, each with an amount of 25, one for each month of the year. The schedule will then be re-used each year until the pledge is closed. Since the open-ended pledge is on-going, the balance due is not updated with each payment and it remains equal to the scheduled amount.

When you load an open-ended pledge into the Gift Pledge Loader transaction table, and subsequently use Gift Pledge Loader to process the pledge, Advance will create the pledge with a zero amount and create the open-ended payment schedule, which can be viewed in the Gift Batch application prior to processing and loading into the permanent gift tables. If you load an open-ended pledge that has an amount greater than zero, Advance will display an error message when you attempt to load the transaction, as open-ended pledges always have an amount of zero. For additional information on using Gift Pledge Loader, please refer to the Gift Pledge Loader User Guide.

Several database tables were modified in order to support this new functionality. For additional information and a complete list of schema changes, please refer to the schema changes section of this document.

Loading Transactions with Notes

Gift Pledge Loader now supports loading transactions along with any notes associated with the transaction. Comments associated with transactions can also be loaded through Gift Pledge Loader, per standard functionality.

When you load a transaction with notes into the Gift Pledge Loader transaction table, and subsequently use Gift Pledge Loader to process the transaction, Advance will create the transaction with the notes. After you process the transaction through Gift Entry and the transaction is loaded into the permanent gift tables, you can view the notes when you access the details of the transaction. For additional information on using Gift Pledge Loader, please refer to the Gift Pledge Loader User Guide.

Several database tables were modified in order to support this new functionality. For additional information and a complete list of schema changes, please refer to the schema changes section of this document.

Linking a Pledge and Pledge Payment (Gift) Together in the Same Gift Pledge Loader Batch

Pledges and pledge payments can now be added and linked together in the same Gift Pledge Loader batch. Previously, a pledge needed to be entered and processed before a payment for that pledge could be entered and processed in a separate batch.

When processing pledges and pledge payments in the same batch, the pledge always needs to come first and the pledge transaction ID must be smaller than the gift transaction ID. For example, if the load ID contains a pledge transaction ID of 1, the gift transaction must be 2 or greater. If the pledge transaction ID is 19, the gift transaction ID must be 20 or greater.

Note: A new field named pledge_gift_link was added to the zz_gpl_transaction and zz_gpl_transaction_archive tables to support this new functionality.

To link a pledge and corresponding payment, populate the new zz_gpl_transaction.pledge_gift_link field with a unique number. This unique number needs
to be the same in the pledge and pledge payment. As with other GiftLoader values, this information must be populated through a site-specific process. When populating this new field, make sure that the pledge number and gift number (gpl_transaction_id) combination is unique. Once the data is inserted into the table, use Gift Pledge Loader to work with and process the transaction. For additional information on using the Gift Pledge Loader utility, please refer to the *Gift Pledge Loader User Guide*.

Adding Multiple Premiums per Transaction

Gift Pledge Loader now supports loading up to four premiums for each transaction. In order to support this new functionality, numerous premium-related fields were added to the applicable Gift Pledge Loader database tables. For a complete list of schema changes, please refer to the schema changes section of this document. For a complete list of Gift Pledge Loader table definitions, please refer to the Gift Pledge Loader Data Elements document. For additional information on using the Gift Pledge Loader utility, please refer to the *Gift Pledge Loader User Guide*.

Associating a Run with Gift Defaults

With Advance 9.10.0, the majority of the fields that display on the updated batch defaults page now also appear on the Gift Defaults page in the Gift Loader application. When you select a GiftLoader run after it has been loaded, you can use the new Gift Defaults page to associate defaults with the transactions in the batch in order to streamline the GiftLoader entry process.

Note: Batch defaults are utilized only when the value isn't populated in the zz_gpl_transaction table. If a value is specified in the table, the batch default value will not be used. The exceptions to this rule are Premiums and Acknowledgments, which allow you to utilize both because they allow multiple rows per transaction**.**

Note: The receipt date field in the zz_gpl_transaction table stores the date of receipt for the transaction. If the receipt date is null, the receipt date will be set to the default date, if one exists. If a default doesn't exist, the receipt date will be set to the transaction date. If the transaction date is null, the date will be set to the system date.

When working with the Gift Defaults page in the Gift Loader application and data loaded into zz_gpl_transaction:

- For a pledge, the transaction amount, frequency, and payment amount must always be provided in zz_gpl_transaction. A pledge transaction amount of zero is allowed. An error will appear if any of these values are not specified.
- For a gift, the transaction amount and payment type must always be provided in zz_gpl_transaction. An error will appear if either of these values is not specified.

Using Streamlined Gift Entry with Gift Pledge Loader Batches

Gift Pledge Loader batches can now be reviewed and processed using the Streamlined Gift Entry functionality, which was introduced in Advance 9.9.0. When loading transactions in the gift pledge loader transaction table, prior to processing the run and viewing the information in the batch, you can indicate that the transaction is for use with streamlined entry. This can be accomplished by entering a Y in the new zz_gpl_transaction.streamlined_gift_ind field when you load the data into this table.

Note: If a transaction within a Load ID has the streamlined_gift_ind set to Y, the entire batch will be marked as a streamlined gift batch. The indicator is not used to determine whether individual transactions are for use with streamlined gift entry.

When you open a Gift Pledge Loader batch, for use with streamlined gift entry, the Streamlined Gift Entry forms will appear in lieu of the standard Classic Gift Entry forms.

Associating events with gifts

You can now associate events with gifts via an appeal. This allows you to track gifts that were received as the result of an event.

Gift Appeal Header Detail form

The Event ID field was added to the Gift Appeal Header Detail form.

Gift Appeals Header lookup form

The Event ID field was added to the Appeals Header (Gift) Lookup form.

Ability to establish gift and pledge types relationships

You can now link a pledge or gift type with a transaction type using the new Gift and Pledge window. The Pledge Gift Types link, which goes to the new window, was added to the following views:

- Pledge Type (tms_pledge_type)
- Transaction Type (tms_transaction_type)

Ability to hide confidential and anonymous gifts

Previously, any user who had access to Advance and access to any of the gift applications could see all gifts and pledges, even those that are marked as anonymous. You can now hide confidential and anonymous gifts from certain Advance users by selecting the new Suppress Anonymous Transactions check box on the Rights Identifiers Form in the Configuration Utility. When this check box is selected, users with this right identifier will not be able to see anonymous transactions on the following forms:

- Transaction List (with Audit, with Corp Totals, with Corp Totals/Audit, with Spouse, with Spouse with Audit)

- Pledges/Payments (with Audit, with Corp Totals, with Corp Totals/Audit, with Spouse, With Spouse with Audit)
- One-Line - Simple Transaction List
- Giving Transaction Lookup List
- Tax Receipts

The Matching Claim and Matching Gift data that is associated with an anonymous transaction is not displayed on the following forms to users who do not have access to anonymous gifts:

- Matching Claims (w/Corp totals)
- Matching Gift (w/Audit, w/Corp Totals, w/Corp Totals/Audit)

Users who do not have access to anonymous gifts will receive a message on the following items on the GOTO for anonymous transactions:

- Gift Update
- Pledge Update
- Matching Gift Update

Added a new application RCPT to find reversed transactions

Added a new application, Receipt Transaction List (RCPT) in Go To to list the reversed or non-reversed Gift, Pledge, and Matching Gift transactions using receipt number. In Go To, you can now enter RCPT in Application field and the receipt number of either Gift, Pledge, or Matching gift in Open with ID field. Click Go to open the Transaction List window, where you can find all the transactions linked to the receipt number including reversed transactions. To view the Overview page of a transaction, click the ellipsis (…) adjacent to the Type column in the table.

Joint Gift/Pledge refinement

You can now modify the joint transaction (Classic Gift/Pledge) even when the couple is no longer married. If the spouse ID number now represents a former spouse, it allows the modification to process without any error messages.

Link Pledge to Gift

You can now link pledge to Classic gift and make it a pledge payment without overwriting the source of gift with the source of pledge.

Giving codes refinement

Added ‘Apply to Other donors’ check box in ‘Giving codes’ forms for both new gift and pledge (Classic and Streamlined). You can now select the ‘Apply to Other donors’ checkbox to copy the information saved for primary donor in ‘Giving code’ to Joint donor and the associated donors. The information in giving code includes: Type, Code, Date, and Name.

The Check box does not appear if there is existing code data for the primary donor. You can see ‘Apply to Other donors’ check box in Giving Code Default on Gift Batch control page.

Note: You should add all associated donors prior to adding the Giving code to primary donor. You can add associated donors by selecting New on ‘Donors’ in Classic Gift/Pledge entry.

Membership Refinements

Membership Views

A new entry in Go To allows you to navigate directly to the Membership Views application. The Go To entry is named Membership Views and has a mnemonic of MVIEWS. Previously, the Membership Views application could be accessed by navigating to the Membership Summary form and using the Page Tree to navigate to the Membership Views application.

As with previous releases, the Membership View that displays by default is specified using the Advance Configuration Utility. For additional information on specifying a default membership report type, please refer to the *Advance Configuration Examples* document.

Membership Appeal Campaign Statistics

The Membership Appeal Campaign Statistics report now only includes appeal headers when the actual revenue for the appeal header (within the specified parameters) is greater than zero. If the appeal header meets the specified parameters, but has actual revenue of zero, the appeal header will not be included in the report.

Associating events with memberships

You can now associate events with memberships via an appeal. This allows you to track memberships that were generated as the result of an event.

Membership Appeal Header Detail form

The Event ID field was added to the Membership Appeal Header Detail form.

Membership Appeals Header lookup form

The Event ID field was added to the Appeals Header (Gift) Lookup form.

Prospect Tracking Refinements

Pasting Text into Text Areas

If you paste text from an external source into any text area in Advance, such as a comment or notes field, Advance will automatically remove any HTML tags when you click Save. This may be of particular importance when pasting text into the Notes or Comments fields on the Contact Report form.

New Features and Functionality - Advance for the University of Arkansas

Prospect Tracking Cascade

Previously, when System option 44 (Prospect Tracking Cascade) was enabled, if the stop date on the assignment, contact_person, proposal, or program_prospect did not agree with the stop date in the prospect record, the stop date was overwritten with the system date when the prospect tracking cascade was applied. Effective with Advance 9.10.0, when the prospect tracking cascade is applied, the system date will be set as the stop date only if the data doesn't already have a stop date. Assignment, contact_person, proposal, or program_prospect records will retain their stop date values and stop date will not be overridden when the prospect tracking cascade is applied and the stop date is already populated for these records.

Contact Type Expansion

The contact type field, used during entry and maintenance of contact reports, was increased from 1 to 3 characters. In order to accommodate this expansion, the contact report table (contact_report.contact_type) and the contact type TMS view (tms_contact_rpt_type) were expanded from 1 character to 3 character fields. For additional information, please refer to the Table Changes section of this document.

Primary Entity Field

The Primary Entity field was added to the Prospect Lookup form to provide the ability to select the preferred prospect.

Contact report refinements

If you enter a value in the unit column when adding a contact report, that value is now populated in the contact report credit table when the contact report is saved.

If a contact report has an attachment, an icon is displayed in the column to the left of the Report # column on the following forms:

- Contact Report List for Entity
- Contact Report List for Program
- Contact Report List for Proposal
- Contact Report List for Prospect

Entity tasks

Previously, you could see prospect tasks but not proposal tasks and proposal tasks but not entity tasks.

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With this release, you can now use GOTO to see a list of all tasks associated with an entity ID number, bypassing the Lookup function. This allows you to see all of the following types of tasks associated with the entity ID in a single form:

- Entity
- Allocation
- Proposal
- Prospect
- Committee
- Program Prospect

Events and Contract/Grant tasks will not be displayed on this report because entity ID numbers cannot be entered on these forms.

Task list

An application was added to display all of the types of tasks associated with an entity without the user doing a task lookup.

The new application can be accessed from the GOTO or from the Entity Overview navigation tree.

When using the GOTO, the mnemonic is TASK, and you must enter an ID number if you are not already on an entity record. When you are on the entity overview for a person record, View Tasks appears in the navigation tree.

The new application displays a list of all of the tasks associated with the entity and has column with the type of task (ENT, PROS, and so on). You can also drill down from the list to go directly to the application that maintains that type of task. Because all of the types of tasks are master list detail applications, the cursor is always in the first row in the list regardless of which row you drilled down from.

Allocation Stewardship refinements

Added an indicator to navigation tree for the Allocation Stewardship.

If you look at Allocation Stewardship for any entity, it now shows sum of the record count from the following five forms:

1. Entity Allocation Beneficiaries
2. Entity Allocation Stewardees
3. Entity Allocation Tasks
4. Entity Allocation Notes
5. Entity Allocation Assignments

Entity Notes refinements

Added a Joint Indicator check box in Entity notes. When the check box is selected, the Note details are copied to spouse. The Note details also include Text security, Document List, and Attachments.

This refinement works similar to the one in Contact Reports.

Events Refinements

Event Participation List

Previously, the Event Participation List displayed the Registration Status (Registered, Cancelled, Purchased, Declined, etc.) in a field named Status. In addition to the existing Registration Status field, the Event Participation List now also includes the Participant Status, which allows you to see, for example, whether the participant Accepted, Participated, Will Attend, or Will Not Attend.
With the addition of the new Participant Status field, named Status, the existing Status field was renamed to Reg Status. The new (Participant) Status field displays to the right of the Participant field, and the renamed Reg Status field displays to the right of the Registered By field.

Display of cancelled event participations or registrations

Users can now choose whether to display cancelled registration and participant data. This affects the following forms.

Participation Form

The Display Cancelled Data check box was added to the Filters line on the Participation form.

For participation data, the new Response Type column added to the Event Participant Status (tms_event_participant_status) view is used. For registration data, the existing Response Type column in the Event Registration Status (tms_event_registration_status) view is used. The new filter is applied to both the list and count section of the Participation form.

If the Display Cancelled Data check box is checked, all of the registration and participant data is displayed if both the Part and Reg check boxes are also checked. The Participations and Registrations counts in the lower count section include all registration and participation rows, including those that are cancelled.

If the Display Cancelled Data check box is not checked, registration or participant data for which the status has a code where the response type is C is not displayed. The Participations and Registrations counts in the lower count section include only the registration and participation rows that are not cancelled.

Note: If the Part or Reg check box is unchecked, no additional filtering of the list occurs because no registration or participant data is included in either list of counts.

Event Overview Form

The Cancellations field was added to the Participation Overview section. This field displays the number of cancellations for the event.

Event Detail Form

The Display Cancelled Data check box was added to the Event Detail form. When this box is checked, cancelled registration and participant data is displayed in the following places:

- Participation and Registration Counts in the Event Navigation Tree
- Participant data on the Participants form
- Registration data on the Registrations form

If this box is checked for an event, the cancelled data is displayed and is included in the counts; if this box is unchecked for an event, the cancelled data is not displayed and is not included in the counts.

Event Participants Form

If the Display Cancelled Data checkbox on the Events Detail form is not checked and the participant has cancelled, the cancellation is not included in the count and is not displayed on the Event Participants form.

If the Display Cancelled Data checkbox on the Events Detail form is checked and the participant has cancelled, the cancellation is included in the count and is displayed on the Event Participants form.

Event Registrations Form

If the Display Cancelled Data checkbox on the Events Detail form is not checked and the registration has been cancelled, the cancellation is not included in the count and is not displayed on the Event Registrations form.

If the Display Cancelled Data checkbox on the Events Detail form is checked and the registration has been cancelled, the cancellation is included in the count and is displayed on the Event Registrations form.

New Features and Functionality - Advance for the University of Arkansas

Event Navigation Tree Changes

The following forms were added to the Event navigation tree to allow users to view cancelled registration and participant data:

- Participants (Cancelled), which shows the number of participants that have cancelled for the event
- Registrations (Cancelled), which shows the number of registrations that have been cancelled for the event

Display Event URLs

You can now add an event's URL on the Event Detail form.

The URL field was added to the header section and the Detail section of the form. If you enter a value in the Detail section, the field label will be a clickable link to the URL after you save the record. The URL in the header section is display only.

New Features and Functionality - Advance for the University of Arkansas

Event Lookup and Event Detail

Added address line fields for the venue in Events for greater flexibility to enter detailed venue information.

When you create a new event, you can now enter data for the following additional fields of Venue details:

- Street
- City
- Zipcode
- Country
- Foreign

Also, you can search results based on the values entered in the additional Venue fields.

Browsers

- Microsoft Internet Explorer® 9
- Microsoft Internet Explorer 10
- Mozilla Firefox® 32
- Safari® 7 (Mac, iPad)
- Google® Chrome 36

TMS refinements

New gender table

Previously, gender values were either hard-coded or drawn from metadata in the .NET code. To provide more flexibility for your gender codes, the tms_gender table is delivered in this release. The following values are delivered:

- F: Female
- M: Male
- U: Unknown

You can define more gender codes as desired.

The following forms were changed to use the tms_gender table:

- Add Person
- Bio Summary
- Children
- Children Lookup
- Entity Detail
- Entity Person Lookup
- Entity Update
- Primary Name/Details
- Student Activity Lookup

Table code maintenance refinement

If you know all or part of a code, you can now perform a keyword search on the TMS Edit Code Form to find the record.

tms_task context column refinement
The context column in the tms_task table has now been fully implemented to allow you to control which codes show in the drop-down lists based on the values in the context column.

Expand Institution Name

Expanded the institution_name field in the institution table from 40 to 100 characters. Now you will be able do the following:

• Enter and save up to 100 characters for Institution name while creating a new institution name in TMSC.

New Features and Functionality - Advance for the University of Arkansas

System Option Codes Added

System Option #	Short Description	Long Description	DATE ADDED
390	Joint Salutation Name Generation Method	When updates are performed via the Marital Information app, the Joint Salutation Name will be built using the following: 1-use first names 2-use last names 3-use original logic (default)	3-Oct-18
391	Display Primary Spouse Indicator on Marital Information form	When enabled, the primary spouse indicator will appear on the Marital Information form. If a joint gift or pledge is entered using the ID of a non-primary spouse, a warning will appear when you save the transaction.	3-Oct-18
377	Encompass SQL Debug	Capture generated SQL for debugging. N - SQL will not be captured. (Default) Y - Capture SQL and insert into adv_log_exceptions table.	3-Oct-18
399	Entity Update Email Option (SO 260 turned off)	When System Option 260 is turned off, this option allows you to choose the format of the Entity Update email. 1 - Include All Data 2 - Include Only Data that has changed	3-Oct-18
340	Online CC - Vendor Secret Key	CyberSource Secure Acceptance only, the secret key generated for your Secure Acceptance Profile	28-Aug-14
339	Online CC - Vendor Access Key	CyberSource Secure Acceptance only, the access key generated for your Secure Acceptance Profile	28-Aug-14
338	Online CC - Vendor Profile ID	CyberSource Secure Acceptance only, the ID (not name) specified for your Secure Acceptance Profile	28-Aug-14
363	Perpetual Gift Close-Ended Pledge Length	Specify the length (in years) of the close-ended pledges Advance creates for perpetual gifts that originate in Encompass. This works in conjunction with System Option 362 option 2.	28-Aug-14
364	Perpetual Gift - Open-ended Pledge Type	The value selected will default into perpetual gift transactions originating online. The Pledge Type selected must have a payment frequency of 'O' for open-ended.	28-Aug-14
365	Perpetual Gift - Pledge Payment Transaction Type	The value selected will default into transaction type for payments associated with perpetual gifts. It will be used for perpetual gifts processed as open-ended or organization specified closed-ended pledges.	28-Aug-14
366	Perpetual Gift - Org Defined Close-ended Pledge Type	The value selected will default into organization defined close-ended online pledges.	28-Aug-14

368	Multiple Allocation Gifts Processing Option	When enabled, each allocation will have its own gift or pledge transaction. Each pledge will have its own schedule. Transactions to multiple allocations will always be kept together in the same batch regardless of other system option values.	28-Aug-14
369	Donor Defined Allocation	Advance creates ledger entries with this 'fake' allocation when donors don't choose an allocation and enter online allocation instructions. Batches with transactions linked to this allocation can't be closed.	28-Aug-14
370	Duplicate Transactions Handling	Specify how Advance handles dup online transactions: 0 - Create gift transactions and place them in a batch with a duplicate batch type (X). 1 - Do not create transactions. Create duplicate report in gift batch. 2 - Ignore duplicate transactions	28-Aug-14
371	Separate batch by Online Campaign ID.	Create separate batches based on the Online Community Campaign ID. N - Batches will not be separated by Online Campaign Control IDs(Default) Y - Batches will be separated by Online Campaign Control IDs.	28-Aug-14
372	Separate batch by Gift Type	Create separate batch for Pledges/Pledge Payments and Gifts. N - Pledges, pledge payments and gifts will be added to the same batch (Default) Y - Pledges and pledge payments will be in the same batch and gifts will be in its own.	28-Aug-14
373	Separate batch for In Honor/In Memory and Joint Donor	Create a separate batch for In Honor/In Memory and Joint Donor transactions. N - In Honor/In Memory and Joint Donor transactions will not be placed in a separate batch. Y - In Honor/In Memory and Joint Donor transactions will be in a separate batch.	28-Aug-14
374	Separate batch by Dollar Amount Threshold	Create a separate batch transactions over the specified amount.	28-Aug-14
375	Streamlined Gift Default	Default Streamlined Gift to checked on Gift Batch Control. N - will not automatically check Streamlined Gift when a new batch is created. Y - will automatically check Streamlined Gift when a new batch is created.	28-Aug-14
376	Streamlined Gift Entry Tender Popup Box	Display Tender Details Popup Box for all Tender N - Only display Tender Details popup box when Tender represents a form of Insurance, Securities, Credit Card, or Gift-in-Kind. Y - Display the Tender Details popup box for all gifts and pledge payments.	28-Aug-14

362	Perpetual Gift Processing Option	The value selected will direct Advance on how to process online perpetual gifts. 0 - Not creating perpetual gifts 1 - Open-ended pledge 2 - Organization specified close-ended pledge 3 - Straight Gift	28-Aug-14
361	Recurring Gift - Pledge Payment Transaction Type	The value selected will default into transaction type for payments associated with recurring gifts.	28-Aug-14
360	Recurring Gift - Pledge Type	The value selected will default into recurring gift transactions originating online. It is used to create the pledge associated with the recurring gifts.	28-Aug-14
367	Perpetual Gift - Gift Transaction Type	The value selected will default into transaction type for perpetual gifts processed as straight gifts.	28-Aug-14
380	Link Business Address and Employment in DataLoader	When enabled, if an Employment row and Business Address are added in the same DataLoader batch they will be linked together if the Address is processed after the Employment row. Works for Bulk Post and side-by-side operations.	28-Aug-14
349	Default Proposal ID for Pledge Payment Transaction	During gift ledger entry of pledge payment transactions, if the pledge that is being paid is linked to a proposal, default the proposal ID in the Proposal field of the gift entry form.	28-Aug-14
400	Indicate Entity Merge and Purge Functionality	For the Merge & Purge process this option allows you to specify whether you want Advance to set the entity as purgable or if you want Advance to automatically purge the entity. No - Set entity as purgable(default) Yes - Automatically purge entity	28-Aug-14
335	Unauthenticated Member ID	This Entity ID is associated with external memberships made by unauthenticated members. When processing these transactions during Fast Key Entry, the appropriate Entity ID should be associated with each membership in lieu of this number.	28-Aug-14
336	Unauthenticated Membership Batch Type	If a value is specified, unauthenticated memberships for use with Fast Key Entry will be placed in a separate batch. Otherwise, all memberships will be placed in batches with the membership batch type of W - External Memberships.	28-Aug-14
337	Maximum external membership transactions for batches	This value indicates the maximum number of membership transactions that will be stored in a batch before a new batch is created to contain subsequent memberships. Applies only to Fast Key Entry batches.	28-Aug-14
334	Membership - Use Fast Key Membership Entry	Turns on the Fast Key membership and dues payment forms.	28-Aug-14
352	Giving Options Credit Card Tender	Giving Options Credit Card Tender	28-Aug-14

351	Giving Options Campaign	Giving Options Campaign	28-Aug-14
350	Giving Options Appeal Code	Giving Options Appeal Code	28-Aug-14
353	Giving Options Gift Transaction Type	Giving Options Gift Transaction Type	28-Aug-14
354	Giving Options Operator Name	Giving Options Operator Name	28-Aug-14
356	Associated Code for Multiple Allocation	Associated Code for Multiple Allocation Associated Rows	28-Aug-14
357	Unauthenticated Operator Name	Giving Options Unauthenticated Operator Name	28-Aug-14
358	Unauthenticated User Group	Giving Options Unauthenticated User Group	28-Aug-14
359	Allocation Default	If designations are not enabled or required in Encompass, this option must be populated with a valid allocation. This will allow the gift ledger entry to be created in batch without issue.	28-Aug-14
355	Giving Options User Group	Giving Options User Group	28-Aug-14
332	EFT - Recurring Membership Default Usergroup	This option defines the default user group to be stored on batches and dues payments created during the Automated Dues Payment process. The new value must be updated in the user group table using the Configuration Utility.	28-Aug-14
331	EFT - Recurring Membership Payments Tender Type	Defines the Tender that will be assigned to all payments created by the Automated Dues Payment process. Valid values are Active tms_memb_pay_type codes with ¿Can be used with recurring dues payments¿ enabled.	28-Aug-14
330	EFT - Recurring Membership Payments to Process	Defines the recurring membership type for which the Automated Dues Payment process will create payments. Valid values are Active tms_memb_recurring_pmt_type codes.	28-Aug-14
333	EFT - Recurring Membership Batch Transaction Maximum	This system option allows you to specify the maximum number of Dues Payments that will be stored in a membership batch created by the Automated Dues Payment process.	28-Aug-14
260	Use DataLoader for Updating Entity Records	When enabled, DataLoader is used for updating entity records. When disabled, the Entity Update request form is used. Used in conjunction with system option 184. Only applies to clients licensed for Advance Web Bio.	24-Sep-07
232	Minimum Length for Passwords	This system option allows you to specify the minimum number of characters for passwords on your system. Value must be between 6 and 30. *WARNING* Values greater than 18 will prevent you from adding Database Authenticated Users.	24-Sep-07

44	Enable PT Cascade	When enabled, and the Active indicator is changed to inactive and/or a new Stop Date is entered (or the existing date is modified) at the Prospect, Program Prospect or Proposal level, cascade this change down to children records.	15-Dec-05
33	Enable Alerts and Messages	Controls the Alerts and Messaging utility. Must be enabled if system option 29 is enabled. 0 - Do not activate. 1 - Activate.	26-Jun-03
26	Joint Salutation & Mail Name Connector	This value indicates the connector used to build the joint salutation and mail name when updates are saved via the Marital Information app. & - Separate joint salutations with the & symbol. and - Separate joint salutations with the word and.	26-Jun-03
17	Mailing Name Generation Method	When the mailing name for a new entity is left blank, use the algorithm for this system option to manufacture the mailing name before saving the row. Please refer to the Configuration Utility User's Guide for more information.	26-Jun-03
16	Disallow Business Address Entry on Entity Additions	When enabled, an end-user can not add a new business address to a new person entity via the entity app. An address is considered business if the business address indicator in the TMS Address Type table is set to "Y".	26-Jun-03
7	Match Major Defaults in TMS Majors	Allows you to require the school, division and department entered with a major match the values in the TMS major table for that major, if they are non-blank.	26-Jun-03