Team Approach 5.0.1
System Administration

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Setting Up a User

Creating and Maintaining User Information

The User Entry screen enables you to update information for a Team Approach[®] (TA) user and to create new TA users. You can access this screen from the System Maintenance module on the Main Menu. You must complete the following steps *in the order listed below* to create a user in TA.

1. Assign a brief name to the individual. This brief name will become the individual's user name. You cannot create a user unless that person has been assigned a brief name.

2. Identify the individual as a TA user.

3. Set up the user name and password.

After you have created a user, you can assign the user privileges on the User Preference Administration screen.

See Also:

Identifying an Individual as a User of Team Approach

The individual you want to identify as a user must have a name record on an existing account in TA, and have a unique brief name (with the User Brief Name function activated). If the individual is not a name on an account, you must create an account.

To identify an individual as a user, complete the following steps.

1. Find the account of the individual whom you want to identify as a user and access the Name Entry screen.

2. Make sure the person has been assigned a brief name. Press [F10] from the Brief Name field on the Name Entry screen to access the Brief Name Functions window.

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3. Enter "A" for active in the User? field to identify the individual as a user of TA.

4. Click <OK> to close the Brief Name Functions window and return to the Name Entry screen.

See Also:

Identifying an Employee of Your Organization

Identifying a Non-Employee Solicitor of Your Organization

Identifying an Employee of Your Organization

You can identify a name in TA as that of a staff member who is an employee of your organization by completing the following steps:

1. Find the account of the employee and access the Name Entry screen for that individual.

2. Enter a unique brief name for the individual in the Brief Name field on the Name Entry screen (i.e., do not enter an account-level brief name on the Account Overview screen).

3. Press [F10] to zoom to the Brief Name Functions window and set the Employee? field to "A" for active.

4. Click <OK> to close the Brief Name Function window and return to the Name Entry screen.

5. Click <Demographics> on the Name Entry screen to access the Demographics view of the Name Entry screen.

6. Enter the person's department and internal electronic mail address in the corresponding fields in the Employee Information block.

Identifying a Non-Employee Solicitor of Your Organization

You can identify a name in TA as that of a non-employee solicitor such as a board member or other person who solicits funds on behalf of your organization but who is not employed by your organization by completing the following steps:

1. Find the account of the individual and access the Name Entry screen for that individual.

2. Enter a unique brief name for the individual in the Brief Name field on the Name Entry screen (i.e., do not enter an account-level brief name on the Account Overview screen).

3. Press [F10] to zoom to the Brief Name Functions window and set the Solicitor? field to "A" for active.

4. Click <OK> to close the Brief Name Function window and return to the Name Entry screen.

Setting Up the User Name and Password for a User

To set up the user name and password for each user, complete the following steps.

1. Access the User Entry screen from the System Maintenance module. TA displays the Find Users window.

2. Click <New> to access the Create New User window.

3. Enter the user's brief name in the User field. You can press [F9] to access a list of names with the User? brief name function.

4. Enter the user's password in the Password and Verify fields. You can enter a password up to 30 characters in length, and the password must start with a letter. The password is not case sensitive.

5. Click <Create> to create the user and return to the User Entry screen.

Note: If you selected a brief name for which the User? brief name function was set to "P" for past or to "D" for delete, TA sets the User? brief name function to "A" for active after you create the user.

See Also:

Marking the System Administrator Checkbox
Marking the Batch Manager Checkbox

Marking the System Administrator Checkbox

On the User Entry screen, you can mark this checkbox for each user who should be able to do the following:

*   Set the accounting batch number for a batch

*   Access TA when the system is disabled

You should mark this checkbox for at least one user at your organization.

Note: When TA is disabled only system administrator users can log on to TA. TA can be disabled in one of two ways.

*   The Disable System Menu procedure sets the Message to Display When System Is Disabled system preference, preventing users from logging on to TA.

*   You manually set the Message to Display When System Is Disabled system preference, preventing users from logging on to TA.

TA is disabled if the Message to Display When System Is Disabled system preference is not blank; the text for this system preference appears in a message when any user tries to log on to TA. Non-manager users click <OK> from the message and return to the desktop of their computers. Only users marked as system administrators can access TA when they click <OK> from the message. If a user marked as a system administrator does log on to TA, the text from the Message to Display When System Is Disabled system preference displays in TA's title bar. Your organization may want to schedule the Disable System Menu procedure to be the first procedure to run nightly and the Enable System Menu procedure to be the last procedure to run nightly.

Marking the Batch Manager Checkbox

On the User Entry screen, you can mark the Batch Manager checkbox to assign a user batch manager privileges. Batch managers can access, release, or post a batch through the screens and operations listed below, even if the Batch Access Privilege system preference is set to "Owner" and the users marked as batch managers are not the owner of the batch. Batch managers can also reassign batches on the Batch Summary Entry screen (by changing the name in the Owner field).

*   Batch Summary Entry

*   Batch Detail Entry

*   Unlock Batches

*   Release Open Batches

*   Post Gift Batches

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Changing a User's Password

A user can, at any time, change their password by following the steps below. The system administrator can change a user's password if he or she keeps a record of user's passwords.

1. Select System-Change Password from the TA menu bar. TA displays the Change Password window.

2. Enter the user's old password in the Old Password field.

3. Enter the user's new password in the New Password field.

4. Enter the user's new password in the Verify Password field to confirm the new password.

5. Click <OK> to close the Change Password window.

Note: You can click <Cancel> on the Change Password window to retain the old password.

Finding an Existing User

When you access the User Entry screen, TA displays the Find Users window. To find a specific user, enter the user's user name in the User field and click <Find>. You can press the [F9] key to view the list of user names. To find all users, leave the User field blank and click <Find>. You can then select the user that you want to update from the List Block.

Inactivating or Deleting a User

You can inactivate a user to prevent users from logging on to the system. To prevent users from logging, you mark the user's record with an inactive or delete status. Note that marking his or her User Brief Name function with a status of P (for Past) *does not* prevent the user from logging on to the system. (This removes the brief name from the corresponding list of values that are available to with each brief name function.)

Inactivating a User

Inactivate a user by setting the Status field on the User Entry screen to "I" for Inactive. If you inactivate a user and that user tries to log on to TA, TA displays a message that states the user name is inactive and prevents the user from logging on to TA.

Marking a User for Deletion

You can mark a user for deletion by setting the Status field on the User Entry screen to "D" for delete. The user name isn't deleted until your organization runs delete processing.

Assigning Privileges to a User

You can assign privileges to a user on the Privileges tab on the User Preference Administration screen. You can access this screen from the System Maintenance module on the Main Menu. When you assign privileges, you identify the following:

- The operations to which a user has access. (See Operations and Roles for the definition of an operation.)

- The type of access to grant: read-only access or read/write access

- The operations to which a user should not have access.

TA includes on the Main Menu only those operations to which a user is granted access. The Main Menu does not display any operation to which a user is not granted access. For example, if you don't grant a user access to any of

the screens, reports, or procedures for the Planned Giving module, when that user clicks <Planned Giving> on the Main Menu, the Operations block is blank.

Note: If a user is granted access to a screen that includes a button that can be clicked to access a second screen, and that user is not granted access to the second screen, when the user clicks the button, TA displays the message "Insufficient privileges to call this operation."

You can assign access to operations individually or using a role. TSI recommends that you assign the role(s) first followed by the individual operations to which the user should have access. You can then assign the roles or individual operations to which the user should be denied access.

Note: If you change a user's access while the user is working in TA, the changes don't take effect until the user exits TA and logs on again.

After you have assigned privileges for a user, you can set other preferences for them on the User Preference Administration screen. See Setting Preferences for a User.

See Also:

Operations and Roles

Structure of the Privileges Tab on User Preference Administration

Assigning and Restricting User Access

Operations and Roles

The term "operation" refers to any screen, report, or procedure such as Post Gift Batches, Batch Upload that you can run in TA. Most operations are available from the Main Menu; some are accessible only from within a screen.

A role is a group of operations. You can use a role to define a user's access to operations. TSI recommends that you create roles based on the different groups of operations needed by your users. Create one role for each group of users whose work requires access to the same set of operations.

In addition, you may have a subset of users to whom access to a group of operations should be denied. You can create a role composed only of the subset of operations and add this role in the Excepted Roles block (of the User Privileges screen) which lists the roles to which the user is denied access.

See "Assigning Privileges to a User" for more information about how to assign a role to a user.

See Also:

Finding a Role

Creating a Role

Adding an Operation to a Role

Updating Operations Within a Role

Printing Roles, Operations, and User Reports

Finding a Role

When you access the Role Entry screen, TA automatically displays the Find Roles window. From this window you can find a specific role by entering the name of the role and clicking <Find>. You can press the [F9] key from the Role Name field to view the list of roles. Once you enter the name of the role and click <Find>, TA displays the role on the Role Entry screen.

If you want to find all roles, leave the Role Name field blank on the Find Roles window and click <Find>. TA displays on the Role Entry screen the first role of all the roles. You can then select a role from the List Block. Or, you can click <Create> on the Find Roles window to access the Create New Roles window to create a new role.

Viewing the Pre-Loaded Roles

When TA is delivered to your organization and *before* your organization adds any roles, you can view the roles delivered with TA. From the Find Roles window, leave the Role Name field blank and click <Find>. TA displays on the Role Entry screen the first role of all the roles delivered with TA. You can then select a role from the List Block.

Creating a Role

Before creating a new role, you should

- Look at the menu structure of TA to understand how the operations are grouped.

- Make sure you understand what roles are delivered with TA.

- Conduct a needs-analysis of your users regarding what operations each user needs to access, and whether they need read/write or read-only access.

- Identify to which operations each user should be denied access.

To create a new role from the Role Entry screen, complete the following steps.

1. Press the [F6] key to access the Create New Role window. You can also access the Create New Role window by clicking <New> from the Find Roles window.

2. Enter the name of the new role in the Role Name field. You can enter up to 30 characters for the name.

3. Click <Create> to create the role. TA returns you to the Role Entry screen.

4. On the Role Entry screen, enter a description of the role in the Description field and enter the operations that compose the role in the Operations block.

5. Add operations to the Role.

Note: If you have a role currently displayed on the Role Entry screen, you must have the cursor in the Description field before you press the [F6] key. If the cursor is in the Operation field on any line and you press the [F6] key, TA displays the Insert Operation window to enable you to add a new operation to the current role.

Adding an Operation to a Role

To add an operation to a role, you must have the role record displayed on the Role Entry screen. To add an operation to the role, enter the operation name that you want to include in the role in the first blank Operation field. You can press [F9] to view a list of operations. TA defaults the Read/Write field to "W" for write enabled. You can change this to "R" for read only. Repeat this process to add each operation that should be included in the role.

Note: Schedule Administration vs. Schedule Administration (FLA Config.): Assign both of these operations (and the same level of access) if you are going to give the user privileges to the Schedule Administration screen. The FLA Config view of this screen is available only if you click on the Schedule button in the Field Level Auditing Configuration screen.

Updating Operations Within a Role

From the Role Entry screen, you can update a role in four ways.

- You can change the read/write status for any operation included in the role by setting the Read/Write field. Set this field to "R" for read only or to "W" for write enabled.

- You can change the status of any operation included in a role.

- You can inactivate or delete the role itself by setting the status of the role.

Whenever you update a role, the changes affect <u>all</u> of the users to whom the role is assigned. Before you make a change, consider who those users are to ensure that you don't make a change that adversely affects one or more of those users. If the change you want to make will adversely affect one or more of the users, you can

- Make the change to individual users' privileges.

- Create a new role that incorporates the change and reassign roles to the group of users assigned the original role.

See Also:
Setting the Status of an Operation
Setting the Status of a Role

Setting the Status of an Operation

When you add an operation to a role, TA defaults the status to "A" for active. You can change the status of an operation within a role as follows:

- You can inactivate an operation within a role if you want to temporarily suspend access to the operation by setting the operation's status to "I" for inactive.

- You can mark an operation for deletion from a role if you don't want the operation included in the role and you don't want to create a new role to make this change. To mark the operation for deletion, set the operation's status to "D" for delete. When your organization runs delete processing, the operation will be deleted from the role.

- You can activate an inactive operation or one marked for deletion by setting the operation's status to active.

Setting the Status of a Role

When you create a role, TA defaults the role's status to "A" for active. Each role delivered with TA is active. You can change the status of a role as follows:

- To suspend access to a role temporarily, set the role's status to "I" for inactive.

- To mark a role for deletion, set the role's status to "D" for delete. When your organization runs delete processing, the role will be deleted.

- To reactivate an inactive role or one marked for deletion, set the role's status to "A" for active.

Printing Roles, Operations, and User Reports

You can print the **User Privileges Listing report** for a listing of the operations and roles assigned to the user. Click the <Report> button from the Privileges tab on the User Preference Administration screen to produce this report.

You can print the **User Listing report** to generate a list of users and corresponding information set up on the User Entry screen. You can set up this report to print only active users or all users. Click the <Report> button from the User Entry screen to produce this report.

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Structure of the Privileges Tab on User Preference Administration

The Privileges tab on the User Preference Administration screen contains four blocks.

- The Roles block which lists the roles to which the user has access

- The Operations block which lists any individual operations to which the user has access

  Note: The Operations block lists only those operations that are not already included through a role in the Roles block. To see a comprehensive list of the individual operations to which the user has access, click <Operations List>. From the Operations List view, you can click <Privileges> to return to the standard view.

- The Excepted Roles block which lists the roles to which the user is denied access

- The Excepted Operations block which lists the individual operations to which the user is denied access

Note: See Operations and Roles for more information.

In addition, there is a button labeled <Operations List>. Click this button to view all of the individual operations to which the user has access.

Understanding the Operations Block Override

The operations listed in the Operations block override what is listed in the Excepted blocks. For example, if an operation is part of a role listed in the Excepted Roles block and that same operation is also listed in the Operations block, then the user will have access to that operation.

In addition, if an operation is listed in the Operations block and is included in a role listed in the Roles block, the **Operations block overrides the Roles block**.

See Also:

Operations That Appear on a User's Main Menu

Operations That Appear on a User's Main Menu

TA includes on the Main Menu only those operations to which a user is granted access. The Main Menu does not display any operation to which a user is not granted access. For example, if you don't grant a user access to any of the screens, reports, or procedures for the Planned Giving module, when that user clicks <Planned Giving> on the Main Menu, the Operations block is blank.

Note: If you change a user's access while the user is working in TA, the changes don't take effect until the user exits TA and logs on again.

If a user is granted access to a screen that includes a button that can be clicked to access a second screen, and that user is not granted access to the second screen, when the user clicks the button, TA displays the message "Insufficient privileges to call this operation."

Assigning and Restricting User Access

You can add an operation or role to the appropriate block to grant or restrict a user's access (i.e., using the Excepted Operations and Excepted Roles blocks) on the Privileges tab of the User Preference Administration screen. To add to any of the four blocks, you can enter information in a blank row. If there are no blank rows, press the [F6] key while in the block to which you want to add and TA inserts a new blank row to that block. You can then enter the information you want in that new blank row.

Changing the Read/Write Access

You can change the user's read/write access to a role or to an operation by setting the Read/Write field in the appropriate block to either "W" for read/write access or to "R" for read only access.

Inactivating or Deleting Roles and Operations for a User

You can temporarily suspend access to a role or an operation by setting the Status field of the role or operation to "I" for inactive.

You can mark an operation or role for deletion by setting the Status field of the role or operation to "D" for delete.

Setting Preferences for a User

You can set operation-level, data-entry, and other preferences for users on the User Preference Administration screen. In addition, you can create copies of operations (screens, reports, and procedures) and customize menus for users.

Note: Set up **privileges** for a user before you set preferences for a user. See "Assigning Privileges to a User."

The User Preference Administration screen contains several tab pages that affect user preferences.

- The Screens, Reports, and Procedures tab pages allow you to set user-level preferences for individual screens, reports, and procedures, respectively.

- The Entry tab affects data-entry preferences

- The Background tab affects background processing preferences

- The General tab affects other preferences that affect multiple areas of the system, such as the default printer.

- The Menu tab enables you to customize the operations that show up in a user's menu.

See Setting up Your TA Preferences for more information about setting these preferences for your users. For information about each of the preferences that can be set for your system (and possibly your users) see the Index of System Preferences.

Note: The section referenced above is written to the end-user's perspective (rather than the system administrator's), as any user can set his or her own preferences if they have access to them. You set preferences on the User Preferences screen. Note that the steps are the same regardless of whether you're using the User Preferences, User Preference Administration, or System Preference Administration screens.

Setting up a User Group

Creating a User Group
Customizing Menus for User Groups

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Creating a User Group

Create a user group if you want a group of people to share copies of reports, screens, queries or user-defined outputs. For instance, you can create a "PG" group that contains all of your planned giving officers. Once you set up a group, you can create copies of reports and screens for all of the planned giving officers to use. (Create copies for a user group on the User Group Preference Administration screen.) Also, for example, if you assign a group of users (a user group) queries and user-defined outputs, then those can schedule and make changes to the same queries and outputs.

Note: You cannot assign privileges and preferences directly to a user group; however, you can assign privileges and preferences to each of the members of the user group on the User Preference Administration screen.

1. Access the User Group Entry screen. TA displays the Find User Groups window.

2. Click <New> to access the Create New User Group window. You can enter a name up to 12 characters in length including spaces, underscores, and periods. This name must be unique.

3. Click <Create>. TA displays the user group on the User Group Entry screen.

4. Enter a descriptive name for the user group in the Description field. The description can be up to 40 characters.

5. Assign members to the user group.

Assigning Members to a User Group

Once a user group has been created, you can assign members to it.

1. In the User Assignments block, click on the first blank line.

   Note: If no blank lines appear, highlight any user name in the User Assignments block and press the [F6] key or click the <New> button on the toolbar to add a blank line.

2. Enter the brief name of the user to assign to the group. You can press the [F9] key to select from the list of user names.

3. Press the [Tab] key. TA displays the user's name line to the right of the user's brief name.

4. Repeat steps 1 through 3 for each additional user that you want to assign to the group.

   Note: You can remove a user from a user group by highlighting the brief name in the User Assignments block and pressing the [Shift] [F6] key combination.

Customizing Menus for User Groups

You can customize menus for user groups on the User Group Preference Administration screen in the following ways.

- You can create copies of screens, reports, and procedures for the user group. See Creating Copies of Screens, Reports, and Procedures for the steps involved.

- You can set the display order for the group's copies of screens, reports, and procedures. See Choosing the Display Order for Your Copied Operations for the steps involved.

Note: You cannot assign privileges and preferences directly to a user group; however, you can assign privileges and preferences to each of the members of the user group on the User Preference Administration screen.

Processing Operations

Scheduled Operations and Ad Hoc Requests

You can run a report or procedure in one of two ways.

- You can submit the operation to run immediately, i.e., an ad hoc request. For example, you can click <Report> on a screen with which a report is associated and submit that report for immediate execution.

- You can schedule the operation to run in the future using the Schedule Administration screen.

When you schedule an operation to run in the future, you can set up the operation to run once or to run multiple times. When you schedule the operation to run multiple times, you can set the dates and times yourself or you can set up the operation to reschedule itself based on a standard frequency (e.g., weekly).

Note: Your organization can restrict which operations can be scheduled to run and whether an operation can be scheduled to run more than once. See Setting the Schedule Flag.

Request Number for Operations Submitted for Immediate Processing

When you submit an operation for immediate processing, TA assigns the next available request number to this "request." TA starts with the number "1" and assigns the request numbers up to the number "9999." Once TA assigns the request number 9999, TA assigns the number 1 again.

TA does not assign a request number to those operations scheduled using the Schedule Entry screen.

Adding an Operation to the Schedule

You can add an operation to the schedule by pressing the [F6] key on the Schedule Administration screen. TA displays the Create New Schedule Request window. This window contains the following fields.

Field	Description
User Profile	TA defaults the user profile to SYSTEM. If you are scheduling an operation that belongs to a particular user or user group, press the [F9] key to change the user profile to the user to which the copy belongs.
Operation	Press the [F9] key from the Operation field to select the operation you want to schedule.

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Field	Description
Job Description	Once you identify the operation you want to schedule, TA sets the Job Description field to that operation's description. You may want to change the job description to make is easier to identify why the operation is in the schedule.

For example, you may schedule the Query and Output Processing operation to process a group of monthly renewal queries. In the schedule, you change the Job Description field from "Query and Output Processing" to "Monthly Renewal Queries" so it easy for users to see why the operation is in the schedule. |
Run Date	TA defaults the date on which the operation should run to the current date and sets the time according to how your organization set the Default Time for Scheduled Jobs system preference (e.g., "20:00:00)." You can change this information. You must enter the date and time using military time in the format MM/DD/YY HH:MM:SS where "MM" is the month, "DD" is the day, "YY" is the year, "HH" is the hour, "MM" is the minutes, and "SS" is the seconds.
Frequency	You can set a frequency if TA should automatically reschedule the operation based on the run date and the frequency you select. Press the [F9] key to choose a frequency.
Order Number	The order number for a scheduled operation indicates how TA should process operations scheduled for the same time. When you schedule an operation, TA defaults the order number specified for that operation on the System Preference Administration screen. If an order number does not default, you can set it manually. You can also change an order number that defaults for the operation.
Queue Number	You can set the queue on which the operation will run. If a default queue has been specified for the operation on the System Preference Administration screen, the queue defaults when you set the Operation field; you can change it.
Continue After Error	This field indicates if TA should process operations scheduled to follow the current operation if the current operation ends in error. This field defaults from the System Preference Administration screen.
Group Name	You can set the Group Name field if you want to add the operation you are scheduling to a group of operations to make it easier to reschedule the group of operations in the future. See "Scheduling a Group of Operations " for more information.

See Also:

Setting the Parameters for an Operation

Scheduling an Operation on a Virtual Queue

Scheduling an Operation to Run after an Operation in a Different Queue

Setting the Parameters for an Operation

TA displays the Request an Operation window when you schedule an operation for which you can set one or more parameters. After setting the parameters, click <Exit> to return to the Schedule Administration screen.

You can set up default parameters for those operations that use parameters. By setting the default parameters for an operation, any time a user schedules that operation to run, TA displays the Request an Operation window with the default parameters. The user can change the defaults if you give them access to do so. See Setting Screen, Report, and Procedure Preferences for an explanation of how to set the default parameters. (Note that that section describes how the user can set defaults on the User Preferences screen. The steps are the same on the System Preference Administration screen.)

Note: You can schedule an operation (e.g., a report, to run multiple times with each run having a different set of parameters as long as the operation has been marked for scheduling multiple times). See Setting the Schedule Flag to learn how to indicate the number of times an operation can be scheduled.

Scheduling an Operation on a Virtual Queue

Team Approach® includes three types of queues: processing queues, virtual queues, and the maintenance queue.

The maintenance queue is Queue 0. Its purpose is to serve as a listener that is always free to perform maintenance tasks (such as starting and shutting down queues). Processing queues (Queues 1 through 18) are the actual TA listeners that run on the server.

You can assign an operation to a virtual queue (Queues 91 through 95) to allow the first available of a group of queues to process the operation. For example, you set up Processing Queues 5-9 to be part of Virtual Queue 93. When you schedule the Query and Output Processing operation, you can schedule it for Queue 93 so that TeTA processes the operation on the first available of Queues 5-9.

See Organizing Queues for instructions on specifying which processing queues comprise a virtual queue.

Scheduling an Operation to Run after an Operation in a Different Queue

To schedule an operation to run after another operation on a different queue, follow the steps below:

1. Schedule the operations to run on different queues with the same run date and time.

    Note: Let's assume that you schedule the first operation on queue 1 and the second operation on queue 2.

2. Make the status of queue 1 active and the status of queue 2 inactive.

3. Schedule the Start Queues procedure to run on queue 1 immediately after operation 1, and indicate that this procedure should start queue 2. For more information about the Start Queues procedure, see "Start Queues."

When operation 1 completes, TA will start queue 2, and operation 2 will start immediately after that.

Working with Scheduled Operations

On the Schedule Administration screen, TA displays both scheduled operations and operations submitted to run immediately.

Active or pending operations that have been submitted for immediate execution appear at the top of the schedule, followed by pending operations that were scheduled. The Schedule Administration screen includes the following information for each operation.

Field	Description
Order Number	The order number for the operation. You can update this field to change the schedule order.
Group	The group to which the scheduled operation belongs. You can update this field if you want to add the scheduled operation to a group of operations to make it easier to reschedule all the operations in the group. See "Scheduling a Group of Operations " for more information.
Description	The description of the operation. You can update this field to make the schedule record more descriptive. For example, if you have scheduled the Query and Output Processing operation for a group of renewal queries, you might update the description from "Query and Output Processing" to "Monthly Renewal Queries."
Run Date	The date and time, in military time, when the operation is scheduled to run. You can update the run date and time for a pending operation.
User	The user who scheduled the operation to run.
Frequency	The frequency TA uses to reschedule the operation. If you did not specify a frequency when you added the operation to the schedule, you can do so on the Schedule Administration screen.
Status	The status of the operation. For example, the status would be set to pending if the operation has yet to run. If a user attempts to enter a record and something happens - like TA crashes - the status remains at inserting to indicate that the record was never completed - that is - was never processed into the scheduling queue.
Queue	The queue on which the operation will run. You can update this field if you want to change the queue for a pending operation.
Continue After Error	Indicates if TA should process operations scheduled to follow the current operation if the current operation ends in error. You can change this field for a pending operation.
Request Number	The request number for the operation if it was submitted to run immediately; that is, not scheduled on the Schedule Administration screen.

See Also:

Refreshing the Schedule After Changing the Order or Run Date

Viewing and Updating the Parameter Settings for a Pending Scheduled Operation

Viewing the Log Messages Associated with an Operation

Viewing and Clearing Errors Associated with an Operation

Rescheduling an Operation

Deleting or Killing an Operation

Refreshing the Schedule After Changing the Order or Run Date

If you change the order number or run date for any scheduled operation, you can click <Refresh> to redisplay the list based on the changes. TA orders the list based first on the run date and time. For those operations with the same run date and time, TA orders the operations based on the order number.

Viewing and Updating the Parameter Settings for a Pending Scheduled Operation

To see the parameter settings for a scheduled operation with the status of pending, highlight that operation and press the [F10] key. TA displays the Request an Operation window. You can change the parameters if appropriate. Click <Exit> to return to the Schedule Administration screen.

Viewing the Log Messages Associated with an Operation

To view the listener logs for an operation, highlight that operation and click <Log>. TA displays the Log Messages window.

Note: When accessed from the Schedule Administration screen or from the Errors/Warnings window, the Log Messages window shows the listener logs for the operation that was highlighted on the Schedule Administration screen. When accessed from the Queue Status window, the Log Messages window shows all the listener logs for the queue that was highlighted on the Queue Status window.

There are three fields on the Log Messages window.

Field	Description
Messages	Displays the listener log, which can contain one or more records of up to 2000 characters each.
Queue Number	Indicates the processing or maintenance queue to which the logs refer.
Queue Start Date	Indicates the date and time that the particular instance of the queue was started.

Note: When you access the Log Messages window from the Queue Status window, the logs for the most recent or currently active instance are displayed by default. In this case, the Queue Number and Queue Start Date fields are updateable—You can enter the queue number or status for any logs that are still in the archive, and the corresponding log will then be displayed. When you access the Log Messages window from the Schedule Administration screen or the Errors/Warnings window, the Queue Number and Queue Start Date fields show information regarding where and when the operation ran. In this case the fields are not updateable.

TA includes a Months to Archive Listener Logs system preference (in the Maintenance group). During End of Month processing, all listener logs that are older than the number of months entered for this system preference will be deleted.

See Also:

Buttons on the Log Messages Window

Buttons on the Log Messages Window

There are seven buttons on the Log Messages window.

- Click <First> to access the first record for the operation or queue.

- Click <Previous> to access the previous record for the operation or queue.

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- Click <Next> to access the next record for the operation or queue.

- Click <Last> to access the last record for the operation or queue.

- Click <Refresh> to refresh the log information. This button is disabled when no more messages will be displayed for the operation or queue.

- Click <Errors> to access the Errors/Warnings window.

  Note: The <Errors> button is disabled if you accessed the Log Messages window from the Queue Status window, or if the logs being viewed are for completed operations.

- Click <OK> to close the Log Messages window and return to the calling screen or window.

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Viewing and Clearing Errors Associated with an Operation

If an operation has a status of in error, partial error, warnings, or cleared, you can view an error message on the Errors/Warnings window. To access this window, click <Errors>. Click <Close> to return to the calling screen or window.

If an operation has the Continue After Error parameter set to "N," and it ends with a status of in error, partial error, or killed, the queue that was running the operation won't run any more operations until the error is cleared. You can clear the error by clicking <Clear> or pressing the [Alt] [F10] key combination. TA displays the message "Are you sure you want to clear this record?" from which you can click <Yes> to set the status of the record to cleared.

Rescheduling an Operation

You can reschedule an operation by completing the following steps.

1. Click <Reschedule> at the bottom of the Schedule Administration screen. TA displays the Reschedule Operations window, and defaults the fields to reschedule the highlighted record.

   Note: If you want to schedule multiple records, you can set the Group Name, Menu Operation, From Schedule Date/Time, To Schedule Date/Time, Schedule Order Range, Frequency, Queue, and Status fields as appropriate. See "Rescheduling a Group of Operations " for more information about rescheduling records within the same group.

2. Set the New Schedule Date, New Queue, and New Frequency fields as appropriate.

3. Unmark the Delete Old? checkbox if you want to retain the old schedule record(s) (i.e., the one(s) being copied). If you leave this checkbox marked, TA will delete the original schedule record(s).

4. Click <Run> to create the new schedule record(s). TA displays the message "# record selected. Reschedule this record?"

   - If this number is what you expect, click <Yes>, then click <OK> on the message "The operation has been rescheduled."

   - If this number isn't what you expect, click <Cancel> and check the information you entered.

5. Click <Exit> to return to the Schedule Administration screen.

Team Approach® includes a system preference that indicates how long schedule records should remain in the Schedule Operations table before being deleted by End of Day Processing. Once a schedule record has been deleted, you cannot copy that schedule record.

Deleting or Killing an Operation

If you submit a request to run an operation and then decide to cancel the operation, you can either delete the request, or, if the operation is already active, "kill" (i.e., halt execution of) the operation through the Schedule Administration screen or Submitted Requests window.

WARNING: Killing active Team Approach® operations can have potentially negative effects on your data. See "Implications of Killing Active Operations " before using this functionality.

To delete or kill an operation, click <Del/Kill> or press the [Shift] [F6] key combination. At this point, TA makes sure that the actual status of the highlighted record still matches the status shown on the screen. Depending on the outcome, one of three things will happen.

1. If the highlighted record still has a status of pending, TA displays the message "Are you sure you want to delete this operation?" from which you can click <Yes> or <No>. If you click <No>, TA returns you to the main screen. If you click <Yes>, TA again makes sure that the actual status of the record matches the status shown on the screen. If the status of the record is still pending, TA deletes the request.

2. If the highlighted record has a status of active or viewing, TA displays the message "Are you sure you want to kill this operation? This will cause a delay to your session of at most one minute, and it may take up to the amount of time the process has been running to finish the kill." You can click <Yes> or <No> on this message. If you click <No>, TA returns you to the main screen. If you click <Yes>, TA again makes sure that the actual status of the record matches the status shown on the screen. If the record still has an active or viewing status at that time, a working bar will come up that says "Killing operation…" while TA attempts to halt the active operation. When control returns to the screen, you will be notified as to the result of the kill request. The most likely results are either that the operation was successfully marked for kill or that the operation completed successfully before it was killed. See #3 for the case where the record no longer has an active or viewing status.

3. If the actual status of the record no longer matches the status shown on the screen, TA updates the status, and displays the message "The status of the operation has changed" in the status bar. You can then take any further actions (such as clicking the <Del/Kill> button again) as appropriate to the new status of the operation.

Note: Users with access to the Schedule Administration screen have the privileges to delete or kill operations submitted by any users.

See Also:

Implications of Killing Active Operations

Implications of Killing Active Operations

The following Team Approach® operations have known limitations which make killing them potentially hazardous. *If you kill any of the operations in this list, contact TSI for assistance in data checking and cleanup.* A brief description of the possible negative effects are included with each operation; including this information with your support request will probably help speed up the support process.

Operation	Possible Negative Effects
Benefit Auto-Renewal	The procedure may have committed changes and if so, should not be rerun.
Create Adjustment Batch	A second run will duplicate any batches that were created in the first run.
End of Month Processing	If the procedure passed the financial updates section, it should not be rerun.

Fund Upload	Data cleanup may be necessary.
General Ledger Interface	Records processed in the first run will need to be fixed so they will be included when the procedure is rerun.
Interaction Upload	A second run may duplicate any interactions that were created in the first run; other data cleanup may be necessary as well.
NCOA Upload	Addresses processed in the first run will be reprocessed when rerun (meaning duplicates may be created).
Perform Data Maintenance	Could leave the target tables and other database objects in a state of disarray.
Query and Output Processing	If update procedures were run to completion, their changes were committed, and rerunning the query/output will redo those changes. Contact TSI only if this applies to your killed run.
Telephone Upload	Telephones processed in the first run will be reprocessed when rerun (meaning duplicates may be created).
Telemarketing Upload	The procedure may have committed changes and if so, should not be rerun.
Telemarketing Download	The procedure may have committed changes and if so, should not be rerun.

See Also:

Running the Undo Upload/Download Procedure

Running the Undo Upload/Download Procedure

The following uploads can be undone using the Undo Upload/Download Procedure. If you kill one of these uploads, you should run the Undo Upload/Download Procedure.

- Account Upload

- Batch Upload

- Charge Download

- Charge Upload

- EFT Generation and Download

- Gift Upload

- Interaction Upload

- Pledge Upload

- Pledge Upload (Telemarketing)

Scheduling a Group of Operations

Team Approach® enables you to define a group of operations, which makes it easier for you to reschedule each operation in the group. For example, on a recurring basis, you may want to run a series of reports; perhaps you even want to run the same report multiple times with different parameter settings for each run of the report. By grouping these operations, you can avoid rescheduling each operation in the group and setting the parameters again.

See Also:

Creating a Group
Adding Operations to the Group
Rescheduling a Group of Operations

Creating a Group

If you want to use the feature of grouping operations in the schedule, you first need to define the group. Complete the following steps.

1. Select Group Name Code Entry from the Codes module. TA displays the Find Code window.

2. To create a group, click <New>. TA displays the Create New Code window.

3. Enter a group name code to represent the group of operations (e.g., "DMSTATS" if you want to create a group for several different parameter settings of the Direct Marketing Response report).

4. Click <Create>. TA displays the Group Name Code Entry screen.

5. Enter a description of the group in the Description field.

6. Assign the group name type of "S" for schedule in the Type field.

7. Enter any comments necessary to explain the operations included in the group.

Adding Operations to the Group

Once you've defined the group name for the operations that should be scheduled together, you need to add each operation to that group. You complete this step by scheduling each operation on the Schedule Administration screen, and assigning the group to the schedule record. That is, when you first determine that a set of operations should be grouped together in the schedule, you must add each of the operations to the schedule one at a time, making sure to specify the group on the schedule record. Then, when you want to reschedule the set of operations, you can reschedule them as a group.

To add each operation to the group, complete the following steps.

1. Select Schedule Entry from the System Maintenance module.

2. Press the <New> button on the toolbar. TA displays the Create New Schedule Request window.

3. Set the Operation field to the first operation to be added to the group (e.g., "Direct Marketing Response Report"). You can press [F9] to select from the list of operations.

4. Set the Run Date field to the date and time on which the operation should run.

5. Set the Frequency field, if the operation should run on a recurring basis (e.g., to "W" for weekly).

6. Set the Order, Queue Number, and Continue After Error fields according to your usual practices.

7. Set the Group Name field to the name of the group you created (e.g., "DMSTATS" for a group of Direct Marketing Response reports).

8. Click <Create>. TA displays the Request an Operation window, where you can set the parameters for the operation. Once you have set the parameters, click <Exit>.

9. Repeat steps 2 through 8 for each operation you want to add to the schedule and to the group. If you are adding reports to the group, set the parameters appropriately. If you are adding the same report to the group several times, you may have different parameter settings for each instance of the report.

Rescheduling a Group of Operations

Once you've defined a group of operations, it is much easier to reschedule all of the operations by rescheduling the whole group. Complete the following steps.

1. Click <Reschedule> at the bottom of the Schedule Administration screen. TA displays the Reschedule Operations window. TA reschedules the operations that match the values that you enter.

2. Enter the name of the group you want to reschedule in the Group Name field (e.g., "DMSTATS" for a group of Direct Marketing Response reports).

3. If you want to reschedule a subset of the group, you can set the Menu Operation, From Schedule Date/Time, To Schedule Date/Time, Schedule Order Range, Frequency, Queue, and Status fields as appropriate.

4. Set the New Schedule Date, New Queue, and New Frequency fields to represent changes you want to make with the group.

5. Unmark the Delete Old? checkbox if you want to retain the old schedule records (i.e., the ones being copied). If you leave this checkbox marked, TA will delete the original schedule records.

6. Click <Run> to create the new schedule records. TA displays the message "# record(s) selected. Reschedule these records?"

   - If this number is what you expect, click <Yes>, then click <OK> on the message "The operation has been rescheduled."

   - If this number isn't what you expect, click <Cancel> and check the information you entered.

7. Click <Exit> to return to the Schedule Administration screen.

See Also:

Deleting Schedule Records from the Schedule Operations Table

Deleting Schedule Records from the Schedule Operations Table

To reschedule a group of operations, the old schedule records must be saved in the Schedule Operations table. TA includes a Number of Days to Keep Schedule Records system preference. Your organization sets this system preference to the number of days the schedule records should be kept until purged by the End of Day Processing operation.

Make sure that you set this system preference appropriately so that schedule records you want to copy are not deleted prematurely from the schedule.

Finding a Set of Scheduled Operations

When you select the Schedule Administration screen, TA displays those scheduled operations that are pending or active. You can select a different set of scheduled operations by clicking <Find> to access the Find Scheduled Requests window. You can select which scheduled operations appear on the Schedule Administration screen by

setting any of the following fields. You can use one or a combination of fields to select the scheduled operations you want to view.

Field	Description
Job	You can select the scheduled operations you want to view based on the job description (which is usually the operation's description, but may be customized). Enter the job description that you want to view. You can press the [F9] key to view the list of job descriptions.
Status	Enter the status of the scheduled operations you want to view. For example, you may want to find all the scheduled operations with a status of "Completed." You can enter more than one status. If you enter more than one status, make sure to enter a comma between each one. You can press the [F9] key to view the list of statuses.
From Date	You can select the scheduled operations you want to view based on a date range. Enter the start date for the range within which the scheduled operations fall. You must enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.
To Date	You can select the operations you want to view based on a date range. Enter the end date for the range within which the scheduled operations fall. You must enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.
From Time	You can select the operations you want to view based on the time at which the operation is scheduled. Enter the start time for the range. You must enter the time in HH:MI format, using a 24-hour clock (e.g., 20:00 for 8 p.m.).
To Time	You can select the operations you want to view based on the time at which the operation is scheduled. Enter the end time for the range. You must enter the time in HH:MI format, using a 24-hour clock (e.g., 22:00 for 10 p.m.).
Frequency	Enter the frequency (or frequencies) of the scheduled operations you want to view. For example, set this field to "W" if you want to see all operations scheduled on a weekly basis. You can enter more than one frequency. If you enter more than one frequency, make sure to enter a comma between each one. You can press the [F9] key to view the list of frequencies.
User	Enter the user name of the user(s) who scheduled the operations you want to view. You can enter more than one user. If you enter more than one user, make sure to enter a comma between each one. You can press the [F9] key to view the list of users.

Field	Description
Queue	Enter the queue number(s) of the scheduled operations you want to view (e.g., if your organization is running multiple TA queues and you want to view those operations scheduled for a particular queue, enter the queue's number).
	You can enter the queue on which the scheduled operation was requested, and/or the queue on which the scheduled operation was executed.
	You can enter more than one queue number in the Queue Requested and Queue Submitted fields. If you enter more than one queue number, make sure to enter a comma between each one, or use a dash to indicate a range.
Request Number	Enter the request number assigned to the scheduled operation you want to view. The request number is assigned only to ad hoc operations submitted for immediate execution (e.g., a report that you submit through the Main Menu, rather than scheduling on the Schedule Administration screen).
	You can enter more than one request number. If you enter more than one request number, make sure to enter a comma between each one, or use a dash to indicate a range.
Order	Enter the order number to select operations scheduled for the same time.
	You can enter more than one order number. If you enter more than one order number, make sure to enter a comma between each one, or use a dash to indicate a range.
Group Name	Enter the name for the group of scheduled operations you want to view. For example, if you've created a schedule group for a series of monthly reports that you run, you can enter the group name to find all reports in the schedule that are part of the group. Press the [F9] key to select from the list of scheduled groups.

Once you have set the fields you need, click <Find> to display on the Schedule Administration screen the scheduled operations that meet the criteria you entered.

From the Find Scheduled Requests window, you can also click <New> to add an operation to the schedule or click <Cancel> to close the window. See "Adding an Operation to the Schedule" for more information on how to schedule an operation.

Working with Ad Hoc Requests

If you have submitted a request for ad hoc processing, you can view information about the request on the Submitted Requests window. The default view of the Submitted Requests window contains requests submitted by you only. You can mark the All Users' Requests? checkbox to view requests made by all users.

To access the Submitted Requests window from anywhere in TA, select System-Request Status from the TA menu bar.

See Also:

Information on the Submitted Requests Window

Information on the Submitted Requests Window

TA displays the following information for each request:

- Request Number

- Description

- Status

- User

- Start Date/Time

- End Date/Time

See Also:

Buttons on the Submitted Requests Window

Buttons on the Submitted Requests Window

There are seven buttons on the Submitted Requests window.

Button	Click to
Zoom	View the parameters of the highlighted request.
Log	Access the Log Messages window. For more information about this window, see "Viewing the Log Messages Associated with an Operation."
Errors	Access the Errors/Warnings window. For more information about this window, see "Viewing and Clearing Errors Associated with an Operation."
	Note: The <Errors> button is enabled only for operations with a status of in error, partial error, warnings, or cleared.
Delete/Kill	Delete your request if it is pending, or kill the operation if it is active. For more information, see "Deleting or Killing an Operation."
	Note: The <Delete/Kill> button is enabled only for operations that you submitted.
Resubmit	Resubmit your own request with the same parameter values as the original request. When you click <Resubmit>, TA displays the message "Do you really want to resubmit this operation?" from which you can click <Yes> or <No>.
	Note: You can resubmit only operations with a status of completed, in error, partial error, cleared, or killed.
Refresh	Refresh the information on the Submitted Requests window.

Button	Click to
Exit	Close the window and return to the calling screen.

Viewing the Status of Your Queues

You can view the status of all processing queues and the maintenance queue on the Queue Status window. To access this window, click <Queue Status> on the Schedule Administration screen.

The Queue Status window consists of a multi-row block that displays a record for the maintenance queue and a record for each processing queue. The block contains the following information for each record: the queue number, the virtual queue to which the processing queue belongs (if any), and the status of the queue.

The possible queue statuses are

- Inactive

- Active

- Shutdown (Indicates that the queue has been marked for shutdown by the Shut Down Queues procedure. As soon as any currently-running operation finishes or is killed, the queue will shut down.)

- Error (Indicates that the queue shut down unexpectedly or encountered some fatal error. If a queue has an error status, it cannot be started again until you clear the error by clicking the <Clear> button or pressing the [Alt][F10] key combination.)

You can refresh the status information by clicking <Refresh>. You can view listener log information for the highlighted queue by clicking <Log>. To return to the Schedule Administration screen, click <OK>.

Setting Up the Nightly Schedule

Operations Included in the Nightly Schedule
End of Month Processing Operation

Operations Included in the Nightly Schedule

When you set up the nightly schedule, you should include the following operations in the order listed.

- Disable System Menu

- End of Day Processing

- Post Gift Batches

- Enable System Menu

- Query and Output Processing

- Query and Output Schedule Listing

You can set each operation up to run daily so that TA automatically reschedules the operation for the next day.

In addition, when your organization is ready to "close" a month, you should schedule the End of Month Processing operation.

See Also:

Scheduling the Disable System Menu Operation and the Enable System Menu Operation

You can schedule the Disable System Menu operation as the first operation in the nightly schedule and the Enable System Menu operation after the Post Gift Batches operation but before the Query and Output Processing operation. By placing the Disable System Menu operation and the Enable System Menu operation in the nightly schedule in this way, you disable TA while the End of Day Processing and Post Gift Batches operations run and enable TA once that processing is finished, permitting users access to TA while queries run.

When you add the Disable System Menu operation to the schedule, TA displays the Request an Operation window with only one parameter, the Message parameter. TA defaults the value of this parameter to the text "System has been disabled. See system administrator." You can change the text as needed. When the Disable System Menu operation runs, TA sets the Message to Display When System Is Disabled system preference to the text from the Message parameter. If a user tries to log on to TA, the text for this system preference appears in a message.

Note: Non-manager users click <OK> from the message and return to the desktop of their computers. Only users marked as managers can access TA when they click <OK> from the message. If a user marked as a manager does log on to TA, the text from the Message to Display When System Is Disabled system preference displays in TA's title bar. See "Marking the System Administrator Checkbox" to learn how to indicate a user is a manager.

When the Enable System Menu operation runs, TA deletes the text from the Message to Display When System Is Disabled system preference. When this system preference is blank, users can log on to TA.

End of Day Processing Operation

The End of Day Processing operation performs the following "clean up" tasks on the database.

- Deletes records from the Schedule Operations table

- Deletes all records in the Operation Choices table

- Deletes all records in the Benefit Choices table

- Deletes all records in the Matching Records table

- Deletes expired records from the Query Retrieved table

- Resets the customer service sequence for interactions assigned to the anonymous account

- Coalesces tablespaces

Note: Be sure to run the End of Day Processing operation *every* day of the week. The following extra functionality happens only on Sundays:
- An analysis of all tables, clusters, and indexes used by TA users. Based on the analysis, the process improves overall TA efficiency by making estimates about the objects analyzed.
- A complete object analysis on the Search Accounts table. This improves the efficiency of the Find an Account operation.

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• An update of completed credit card transactions with "dummy" credit card numbers.

See Also:

Deletes Records from the Schedule Operations Table

Each time you create a schedule record using the Schedule Administration screen, the record is stored in the Schedule Operations table. The End of Day Processing operation deletes records from the Schedule Operations table based on the Number of Days to Keep Schedule Records system preference. TA subtracts the number of days from the current run date. TA then deletes any schedule records with a run date equal to or older than the date resulting from subtracting the number of days from the current run date.

Deletes Records from the Operation Choices Table

The Operation Choices table temporarily stores a user's privileges. Each time a user logs on to TA, TA copies the operations to which the user has access, including the type of access, to the Operation Choices table. When the user accesses the Main Menu or uses the <List All> feature to view the list of operations in alphabetical order, TA references the Operation Choices table to create the menu or the list.

When a user exits TA, TA removes the user's privileges from the Operation Choices table. If a user "crashes" in TA and must exit TA abnormally, then the user's privileges aren't removed from the Operation Choices table. The End of Day Processing operation deletes all records from the Operation Choices table.

Note: If multiple crashes occur, users may not be able to log on to TA if the table is full. In this situation, when a user tries to log on to TA, TA may display a message that states "Error 40735" with no text or 'Error 40029" with no text. If the table is full, you can manually delete the records from the Operation Choices table to correct the problem. If you manually delete the records from the Operation Choices table, those users currently working in TA will need to exit and log back on to TA (when such a user exits to a menu, no operations appear because the Operation Choices tables is empty).

Deletes Records from the Benefit Choices Table

Your organization has set up benefits to be awarded automatically based on a set of criteria (e.g., pledge amount and gift type). Each time you enter a pledge or gift using the Batch Detail Entry screen, TA awards those benefits set up for automatic awarding for which the pledge or gift qualifies. If a donor's pledge or gift qualifies for one or more benefits set up for automatic awarding, TA stores the benefits in the Benefit Choices table temporarily. The End of Day Processing operation deletes all records from the Benefit Choices table.

Deletes Records from the Matching Records Table

Each time you search for an account or create an account, TA searches for matching accounts. The Matching Records table temporarily stores these matching accounts.

When a user selects the account from the list of matching accounts or creates the account, TA removes the matching accounts from the Matching Records table. If a user "crashes" while viewing the list of matching accounts and must exit TA abnormally, then the matching accounts aren't removed from the Matching Records table. The End of Day Processing operation deletes all records from the Matching Records table.

Deletes Expired Records from the Query Retrieved Table

When you run a query, you can indicate that the records selected by the query should be saved. If you save the records, TA stores those records in the Query Retrieved table. The End of Day Processing operation deletes the records stored in the Query Retrieved table based on the expiration date of the query that selected those records.

When you create a query, you can set the expiration date. If you don't set the expiration date, TA sets the expire date when the query is run based on the Days Until Queried Records Expire system preference.

Resets the Customer Service Sequence

If you create more than one interaction for an account on the same day (e.g., you receive two separate telephone calls from the account, TA assigns a sequence number to each interaction). TA starts with the sequence number "1" and increments the number for each subsequent interaction on the same day for the same account.

When your organization has an interaction with someone who does not provide any identifying information, your organization can record this interaction by assigning it to the account for unknown interactions. TA identifies the account for unknown interactions by referencing the Account for Unknown Interactions system preference.

The End of Day Processing operation resets the sequence number to "1" for the account for unknown interactions.

Coalesces Tablespaces

The End of Day Processing operation coalesces free space in all tablespaces within TA.

Updates Completed Credit Card Transactions with "Dummy" Credit Card Numbers

Note: The End of Day Processing operation performs this update only on Sundays.

The End of Day Processing operation finds all credit card pledge transactions and credit card gift transactions with one of the following status codes.

- "FF" for fulfilled

- "DF" for default fulfilled

- "UC" for uncollectible

- "PC" for partially collected

Each status code indicates that your organization has completed billing against the credit card for the pledge or gift.

For each transaction selected, TA determines whether the transaction is old enough to replace the credit card on the transaction with the appropriate dummy credit card number. TA references the Years to Retain Credit Card Numbers system preference to determine whether the gift date of the transaction is equal to or greater than the date that results from subtracting the value of the system preference from the current run date. If the transaction is older than the resulting date, then End of Day Processing operation replaces the credit card number on the transaction with the appropriate dummy credit card number.

- For American Express™ ("BA"), the dummy credit card number is "300000000000007."

- For Diner's Club™ ("BD"), the dummy credit card number is "6000000000000007."

- For Mastercard™ ("BM"), the dummy credit card number is "5000000000000009."

- For Visa™ ("BV"), the dummy credit card number is "4000000000000006."

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- For charge card ("CH"), the dummy credit card number is "000000000000000."

Note: For each credit card pledge transaction, TA updates each associated pledge payment with the dummy credit card number.

Post Gift Batches Operation

When you add the Post Gift Batches operation to the schedule, TA displays the Request an Operation window. If the Batch Number parameter is set to "ALL," then when this operation runs, TA selects all released batches and processes them to create transactions. If you want to schedule a particular batch for processing, you can enter the batch number for that batch. To view the list of released batches, press the [F9] key.

Query and Output Processing Operation

When you add the Query and Output Processing operation to the schedule, TA displays the Request an Operation window with the following parameters: Query Name, Schedule Date, Record Sequence, Group Name, and Complete After Error. You typically set the parameters of the Query and Output Processing Operation in one of the following ways:

- You leave the Query Name parameter blank. When the operation runs, TA selects all pending query and output schedule records that should be processed by comparing the schedule date for the query and output schedule record to the run date for the Query and Output Processing operation. If the schedule date is the same as the run date or earlier, then the query and output schedule record is processed.

- You set the Query Name, Schedule Date, and Record Sequence parameters to schedule a particular query and output schedule record for processing. Because you can create query and output schedule records for a query to run multiple times on the same day, setting all three parameters uniquely identifies the query and output schedule record that you want to process. To view the list of queries, press the [F9] key from the Query Name parameter.

- You set the Group Name parameter to schedule a group of query and output schedule records for processing. The group name functionality enables you to "batch" query and output schedule records. For example, if several renewal queries must be scheduled at the end of each month, your organization can group them together as the "Monthly Renewals" group. When you are setting up your schedule, you can set this parameter to indicate that you want to process only the query and output records that are part of the group.

- You set the Complete After Error parameter to "Y" if you want query and output processing to continue after a query ends in error. Set this parameter to "N" if you want to stop query and output processing after a query ends in error.

Usually, you schedule the Query and Output Processing operation after the Post Gift Batches operation so that all batches are processed before running queries. By scheduling these operations in this order, you ensure that the queries run against up-to-date transactions (e.g., your acknowledgement query will run against transactions that include the most recent pledges, pledge payments, and gifts).

See the Scheduling Queries and Viewing Records Retrieved chapter to learn how to set up a query and output schedule record.

Query and Output Schedule Listing Operation

The Query and Output Schedule Listing operation is a report that prints the name of each query scheduled to run along with the actual run date, the number of records retrieved by the query, the time the query took to run, and the outputs run with the query.

End of Month Processing Operation

When your organization wants to "close" a month, you should add the End of Month Processing operation to the nightly schedule. "Closing a month" means that your organization has entered all pledges, pledge payments, and gifts for the fiscal month and wants to "close the books" for that fiscal month.

The End of Month Processing operation performs the following tasks on the database.

- Updates the **period dates** for all activity type records and updates the **period amount** fields for all account activities records if the end of the current month equals the end of the current period

- Updates the **fiscal year totals** for all account activities records if closing the month also closes the fiscal year

- Updates the **calendar year totals** for all account activities records if closing the month also closes the calendar year

- Updates the **giving level amounts** for relevant account activities records if closing the month also closes the calendar or fiscal year

- Updates the **status** of all account activities records such as from active to grace or from grace to lapse, by referencing the Activity Status table. Your organization determines the values in this table.

- Updates the fields for the **largest recent gift** information for all account activities

- Deletes guide interactions

- Updates the **Current Fiscal Month** and **Current Fiscal Year** system preferences

- Deletes archived listener logs

See Also:

Updates the Period Dates and Amounts (End of Month)

Updates the Fiscal Year Totals (End of Month)

Updates the Calendar Year Totals (End of Month)

Updates the Giving Level Amounts (End of Month)

Updates the Largest Recent Gift Information (End of Month)

Deletes Guide Interactions (End of Month)

Updates the Current Fiscal Month and Current Fiscal Year (End of Month)

Deletes Archived Listener Logs (End of Month)

Updates the Period Dates and Amounts (End of Month)

The End of Month Processing operation updates the date ranges for the periods set for each activity type if the Current Fiscal Month system preference is the same as the month of the current period end date. TA converts the Current Fiscal Month system preference using the Fiscal Year Offset system preference to the calendar month to determine if the calendar month is the same as the month of the current period end date.

For example, assume that the Fiscal Year Offset system preference is set to "6," the Current Fiscal Month system preference is set to "9," and the period dates represent quarterly periods by calendar year for each activity type. The date ranges for the four periods are as follows where "YY" represents the appropriate year.

Period (Quarterly)	Start Date	End Date
Current	1/1/YY	3/31/YY
Last	10/1/(YY-1)	12/31/(YY-1)
2nd	7/1/(YY-1)	9/30/(YY-1)
3rd	4/1/(YY-1)	6/30/(YY-1)

If your organization runs the End of Month Processing operation, TA figures out that the current calendar month is March because the Fiscal Year Offset system preference indicates that your organization's fiscal year starts in the month of July and the Current Fiscal Month system preference indicates the ninth fiscal month is the current fiscal month which equates to the month of March. Given that the current calendar month is the same as the month for the end date of the current period, the End of Month Processing operation resets the period dates.

TA figures out the new current dates by calculating the number of months between start date and the end date of the current period and adding that number of months to each. Then, TA moves the 2nd (two periods ago) dates to the 3rd dates (three periods ago), the last dates (the previous period) to the 2nd dates, the existing current dates to the last dates, and resets the current dates to the new current dates.

See the Setting System Preferences chapter for an explanation of the Current Fiscal Month system preference and the Fiscal Year Offset system preference. Also, how your organization has set the Period Date Setting system preference determines if periods are updated at the end of each *period* as defined in the Activity Type screen (set to Period End) or if periods are updated at the end of each *month* to be a range equal to the *12 months prior* to the current month (set to Month End).

Updates the Period Amounts

The End of Month Processing operation updates the period amounts for each account activity record if the operation updated the period date ranges for each activity type.

See the Viewing Transactions, Benefits, and Interactions chapter for an explanation of the account activity record.

Updates the Fiscal Year Totals (End of Month)

The End of Month Processing operation updates the fiscal year totals for each account activity record if closing the month also closes the fiscal year. TA figures out whether the fiscal year is being closed based on the Current Fiscal Month system preference.

TA is programmed for a 12-month fiscal year. If the Current Fiscal Month system preference is set to "12" and you run the End of Month Processing operation, TA resets the fiscal month to "1," increments the fiscal year by 1, and updates the fiscal year totals because a fiscal year just ended.

See the Setting System Preferences chapter for an explanation of the Current Fiscal Month system preference. See the Viewing Transactions, Benefits, and Interactions chapter for an explanation of the account activity record.

Updates the Calendar Year Totals (End of Month)

The End of Month Processing operation updates the calendar year totals for each account activity record if closing the month also closes the calendar year. If the month being closed is December, TA resets the calendar year totals.

Assume that the Fiscal Year Offset system preference is set to "6" and the Current Fiscal Month system preference is set to "6." TA figures out the current calendar month is December because the Fiscal Year Offset system preference indicates that the fiscal year begins in July and the Current Fiscal Month system preference indicates the current fiscal month is the sixth one which equates to the month of December. Given that the current calendar month is the last month of the calendar year, the End of Month Processing operation resets the calendar year totals.

See the Setting System Preferences chapter for an explanation of the Current Fiscal Month system preference and the Fiscal Year Offset system preference. See the Viewing Transactions, Benefits, and Interactions chapter for an explanation of the account activity record.

Updates the Giving Level Amounts (End of Month)

An organization can determine whether giving level amounts for an activity type are reset by calendar year, fiscal year, or on a membership renewal basis.

If closing the month also closes the fiscal year, and an activity type's giving level reset is fiscal-year based (as set on the Activity Type Code Entry screen), the End of Month Processing operation resets the giving level amount to the current fiscal year amount.

If closing the month also closes the calendar year, and an activity type's giving level reset is calendar-year based (as set on the Activity Type Code Entry screen), the End of Month Processing operation resets the giving level amount to the current calendar year amount.

When a giving level amount is set to $0 by the End of Month Processing operation, the old giving level and current activity are retained. If the donor had given a "future" gift (e.g., the gift was made at the beginning of January before the End of Month Processing operation was run for December), all giving level fields are evaluated using the rules in the Giving Level table. Before giving level amount gets reset, prior giving level amount will be updated with the current giving level amount information.

See the Viewing Transactions, Benefits, and Interactions chapter for an explanation of the Giving Level Reset field and the account activity record.

Example (Updates the Giving Level Amounts)

If the "P" activity type's giving level reset is set to "C" for calendar year based, each gift the donor gives to this activity type is added to the current giving level, regardless of gift type. In this scenario, if a donor gives a renewal gift of $50 before the end of a calendar year, that $50 is added to the total giving level amount even though it is a renewal gift type. When the End of Month Processing operation is run for the month of December, the giving level amount will be set to $0.

Note: If the donor has a $10 gift processed with a January gift date before the End of Month Processing operation is run for December, the giving level amount will be set to $10 when the End of Month Processing operation is run. Until the End of Month Processing operation is run, the $10 gift will not show up as part of the giving level amount.

If the "P" activity type is set to reset at the end of a fiscal year, the functionality is the same as when it is set to reset at the end of the calendar year, except that it will be reset only when the End of Month Processing operation closes out the fiscal year.

Updates the Largest Recent Gift Information (End of Month)

The End of Month Processing operation updates the largest recent gift information for each account activity record based on the Recent Years system preference and the current run date. TA subtracts the number of years represented by the Recent Years system preference from the current run date. For each account activity record, TA finds the largest pledge or gift that the account gave to the activity type for the account activity record during that time period. TA then sets the Largest Gift Amount field, the Largest Gift Date field, and the Largest Gift Source field to the values from the transaction selected.

See the Setting System Preferences chapter for an explanation of the Recent Years system preference. See the Viewing Transactions, Benefits, and Interactions chapter for an explanation of the account activity record.

Deletes Guide Interactions (End of Month)

The End of Month Processing operation deletes the interaction records that represent your organization's publication based on the Months to Keep Guide Interaction system preference. Your organization sets this system preference to the number of months to keep these interaction records. When the End of Month Processing operation runs, TA subtracts the number of months from the current run date. TA then deletes the correct interactions by selecting only those interactions with the Interaction Category set to "BE" for Benefit Sent, the Interaction Type set to "GDE" for Guide, and an interaction date older than the number of months subtracted from the current date.

Note: The End of Month Processing operation only deletes guide interactions if the deletion set is less than 10 percent of the table records. If the deletion set is greater than 10 percent, Team Approach® returns a message to delete guide interactions through the Perform Data Maintenance process. TSI recommends that the column (or field-level) Auditing trigger be disabled before attempting to delete guide interactions through the Perform Data Maintenance process. Contact TSI for assistance when disabling this trigger.

Updates the Current Fiscal Month and Current Fiscal Year (End of Month)

The End of Month Processing operation updates the Current Fiscal Month system preference and the Current Fiscal Year system preference. TA increments the fiscal month by 1. If this change would set the fiscal month to "13," then TA sets the fiscal month to "1" and increments the fiscal year by 1.

See the Setting System Preferences chapter for an explanation of the Current Fiscal Month and Current Fiscal Year system preferences.

Deletes Archived Listener Logs (End of Month)

Listener log records are stored in the Schedule Operations Log table. The End of Month Processing operation deletes records from the Schedule Operations Log table based on the Months to Archive Listener Logs system preference. TA subtracts the number of months from the current run date. TA then deletes any listener logs with a queue start date equal to or older than the date resulting from subtracting the number of months from the current run date.

See the Setting System Preferences chapter for an explanation of the Months to Archive Listener Logs system preference.

System Maintenance Procedures

Field-Level Auditing Configuration

Delete Processing

Duplicate Detection Procedure

Perform Data Maintenance

Start Queues

Shut Down Queues

Touchpoint Notification

Field-Level Auditing Configuration

Set up the field-level auditing feature if you want to capture the before and after values of specific fields and store the history of those changes for a designated period of time. To view the results of account-related field auditing, click the <Audit> button from any account-related screen. (To view auditing information for non-account-related fields your database administrator needs to run scripts from the system's back end.)

- Use the Field-Level Auditing Configuration screen to modify the set up of the procedure from the last time it was run. On this screen you identify the fields for which audit data should be stored.

- To execute the auditing feature run the Reconfigure Field-Level Auditing procedure with the Reconfigure Auditing report. You can click the <Schedule> button from the Field-Level Auditing Configuration screen or use the Schedule Administration screen to run the procedure. We recommend that you do not schedule this procedure if users are on the system or if there are other batch jobs running since locking errors may occur.

- Use the Field-Level Auditing Config. Listing report if you want a printed version of the information displayed Column Data Auditing Configuration screen. That is, the information in this report is the same as that as what is displayed in the screen. Use the Reconfigure Field-Level Auditing report to view a list of all tables for which the procedure was successfully enabled or disabled. If the

procedure was not successfully reconfigured for any table, the report lists any error messages or warnings.

See Also:

About the Field-Level Auditing Configuration screen

About the Field-Level Auditing Configuration screen

This screen enables you to configure which fields will be audited during the Field-Level Audit Configuration procedure.

- Hint: Use fields that TA composes whenever possible. For example, the Name Line field is automatically updated if any component changes such as Title, First Name, Middle, Last Name, and Suffix. Other example of automatically composed fields are: Address Line, Last Line, and Account Name (Name ID 0).

Note: You can click on any column header to sort information in that column by ascending/descending order. Each heading also includes a dropdown list that you can use to filter what is displayed on the screen.

Field	Description
Enable CDA?	Mark this checkbox to use the auditing feature. You cannot use it if this checkbox is unmarked.
Table	Indicates the table in which the field exists.
Column	Indicates the specific field for which you will (or will not) be tracking edits.
Current?	Is not modifiable. Is checked if the field was included in the procedure, or was 'audited', the last time the procedure was run.
Proposed?	Indicates whether the field will be included when the procedure is next run. Mark this checkbox if you want the field to be included in auditing. Un-check if you do not want the field audited. When the procedure is run, it compares the Current? column against the Proposed? to determine whether to audit that field.
In Error?	Is not modifiable. Is checked if there were errors for a field that was audited the last time the procedure was run. Re-run the procedure if there were errors. If errors persist please contact TSI.
<Schedule> button	Click to go to the Schedule Administration (FLA Config.) screen* and schedule the Reconfigure Field-Level Auditing procedure to run.

Delete Processing

The Delete Processing procedure enables your organization to delete records marked with a status of "D" for delete. Because running this procedure against an entire database is time-consuming, the procedure includes parameters so your organization can control the scope of the processing.

When you schedule this procedure, you can specify a table or a section (group of tables) from which you want to delete records marked with a status of "D." For example, you can delete records from the Account Type table, or you can delete records from all the tables included in the Codes section (e.g., Account Type, Account Category, Address Type, etc.)

All of the tables in TA are organized into delete "levels", according to which other tables in the database reference them. A table that is not referenced by any other tables is placed in level 0. Tables that are only referenced by the

tables in level 0 are in level 1. This tree structure continues to the point where all tables are in a level. Delete processing runs through these levels in increasing numerical order, starting with 0 the first time it is run.

Processing for a given level includes these three main steps:

1. Determine the delete set. Each table in the current level is searched for records with status set to D.

2. Search for references to the records in the delete set. Cursor through the records in all tables which reference any of the tables in the current level, and determine if they reference any records in the set of records we want to delete. If a reference is found, note the fact that we cannot delete that record. Handle circular references , cascading constraints (see above), multi-value fields, and store information for reporting purposes.

3. Process the delete set. This includes (a) deleting all deleteable rows, (b) updating all records that should be cascaded to with status D, (c) updating all non-deleteable rows that are the parent of a record in a non-deleteable table with status ND (Non-deleteable), and (d) writing information to reporting tables on the outcome for all records in the delete set.

If Delete Processing Does Not Run to Completion: TA saves information and allows the process to start up again where it left off.

Below are the available parameters for delete processing: The highest level of performance is achieved by specifying a value for Minutes to Run and setting Tables/Sections to ALL.

- Tables/Sections: This parameter allows you to indicate specific tables or "sections" of tables to process. Table sections are codes that correspond to convenient groupings of tables, such as "QO" for all tables related to the Query and Output module.

- Minutes to Run: Enter the number of minutes delete processing should run. When the time limit is reached, the process will save all information it needs to the database, and then on the next run it will pick up where it left off. Because the amount of time this takes will always be an unknown and potentially highly variable quantity, running without a time limit is not recommended.

  The recommended use of the process is to schedule delete processing on a regular frequency (daily, weekly, etc.) for a certain amount of time. The process will then run regularly and perform its maintenance actions on the database. If left blank, the process will run to completion. In order to "complete", delete processing must make an entire pass through the database from level 0 to the last level without updating any records to status D because of a cascading constraint. In this case, the results on any future processing would be identical to those of the prior pass - as such, TA can stop processing at this point.

- Report Only?: If set to Y, then no changes will be made to TA data during the run. All other steps will be carried out, and the report will be produced at the end of the process. The results of a multi-level run will be inaccurate, however, because records which would have been deleted on a normal run will appear as references preventing deletion of records later in the process. For this reason, the usefulness of report-only mode is limited.

Previewing Records to be Deleted Before Delete Processing Occurs

The Delete Processing Preview report displays the number of records that are marked for deletion from each table included in the report. See "Reviewing the Delete Processing Preview Report" for more information on the Delete Processing Preview report.

See Also:

Parameters (Delete Processing)

Reviewing the Delete Processing Preview Report

Reviewing the Delete Processing Status Report

Parameters (Delete Processing)

You can set the following parameters when you schedule the Delete Processing procedure.

Parameter	Description

Parameter	Description
Report Only?	Set this parameter to "Y" for yes if you want to see the Delete Processing Status report with a summary of the records to be deleted *before* you actually run delete processing.
Table/Section	Enter the table or section of tables from which you want to delete records. Press the [F9] key to view the tables and sections of tables from which records can be deleted.
Output Destination	Set this parameter to the destination for the procedure's reports (i.e., PRINTER, FILE, or PREVIEW).
Printer	Set this parameter to the printer name, if the Output Destination parameter is set to "PRINTER."
Print Format	Set this parameter to the desired output format for the reports (e.g., PDF or PostScript).
Report Path	Enter the directory path for the procedure's reports.

Reviewing the Delete Processing Preview Report

You can run the Delete Processing Preview report *before* actually running delete processing if you want to see the numbers of records delete processing will delete from each table. You can run this report to view the counts for one or multiple tables; TA defaults the Table/Section parameter to "ALL."

Note: The Delete Processing Preview report contains only tables from which records can be deleted.

The tables are grouped by section. For each table, the report lists the number of records that are marked for deletion (i.e., they have a status of "D" for delete). At the end of each section, the report totals the number of records that are marked for deletion.

See Also:

Example of the Delete Processing Preview Report

Example of the Delete Processing Preview Report

The following is an example of the formatting of the Delete Processing Preview report. In the example, the Delete Processing Preview report is run for the Account Management and Benefits Management sections.

Delete Processing Preview Report

Section Name	Table Name	Marked Count
AM-Account Management	ACCOUNT_PROJECTS	0
	ADDRESSES	146
	BRIEF_NAME_FUNCTIONS	4
	CLASSIFICATIONS	170
	DUPLICATE_MERGES	3

	EDUCATION	15
	FINANCIAL_RESEARCH	12
	INTERESTS	120
	JOB_FUNCTIONS	3
	OTHER_CHARITABLE_GIVING	12
	PROSPECT_RATINGS	0
	RELATIONSHIPS	109
		594
BM-Benefits Management	BENEFITS	24
	BENEFIT_PACKAGE_ITEMS	0
		24

Reviewing the Delete Processing Status Report

You can run the Delete Processing Status report *before* actually running delete processing if you want to review the records to be deleted as well as the records that TA cannot delete. TA *automatically* runs the Delete Processing Status report each time the Delete Processing procedure is run.

This report reports the outcome for each record in the delete sets processed on a given run of delete processing. If a record is not deleteable, the report indicates in which tables the record was referenced, how many references have status D (meaning they may be deleted on a future run, typically, these would represent cascaded-to records), and how many references do not have status D or are in non-deleteable tables.

The report shows the table name of each table selected for deletion. Under each table name, the report lists the records in the table that have been marked for deletion. If a record has child records, those appear in a block beneath the record, with a status that explains whether the child record can or cannot be deleted.

The following table describes each status that can appear in the Delete Processing Status report.

Status	Description
D	The record has been deleted through the Delete Processing procedure. This status appears only when delete processing has actually run.
U	The record cannot be deleted because a record from a child table was not marked for deletion. This status usually appears for records from the parent table, but it can appear for records from a child table if the child table also has one or more child tables.
E	The record is preventing deletion of a record from a parent table.
R	The record will be deleted when the Delete Processing procedure is run. This status appears when you run the report before you actually run delete processing.

See Also:

Example of the Delete Processing Status Report

Example of the Delete Processing Status Report

The following is an example of the formatting of the Delete Processing Status report. This section repeats for each record from the parent table that was marked for deletion. If the parent table has a record marked for deletion for which no child records exist, TA displays the message "No children found…record deleted."

In the following example, the Delete Processing procedure is run to preview the report for deleting records from the Classification Category table. The Classification Code table is a child table, and the records from the child table have not been marked for deletion.

Delete Processing Status Report

Delete Date

Table Name	CLASSIFICATION_CATEGORY		
Checking Constraint	PK_CLASSIFICATION_CATEGORY		
Parent Record Keys	[Code Marked for Deletion]	Parent Sts	U

Children Found. Record Deleted only if all children have status D.

Child Table Name	Child Constraint Name	Child Record Keys	Child Sts
CLASSIFICATION_CODE	FK_CDCLC_CLASS_CATEGORY	[Code not marked "D"]	E
CLASSIFICATION_CODE	FK_CDCLC_CLASS_CATEGORY	[Code not marked "D"]	E
CLASSIFICATION_CODE	FK_CDCLC_CLASS_CATEGORY	[Code not marked "D"]	E
CLASSIFICATION_CODE	FK_CDCLC_CLASS_CATEGORY	[Code not marked "D"]	E

In this example, the record from the parent table, Classification Category, cannot be deleted unless the corresponding records from the child table, Classification Code, are marked for deletion.

Change Brief Name Procedure

Use this procedure if you need to edit the original brief name that you assigned to an account or name. TA changes all references from the Old Brief Name to the New Brief Name. (This includes all audit fields if applicable.) You can run this procedure for only one brief name at a time.

Parameter	Description
Old Brief Name	This must be a brief name that exists in TA. You can press [F9] to select from the list of values.
New Brief Name	This name must not already exist in TA. Enter this field according to your organization's naming conventions (if applicable).

Related Procedure:

Transfer Brief Name Responsibilities Procedure

Transfer Brief Name Responsibilities Procedure

Use this procedure if you want to replace certain Employee, User, or Solicitor fields from one brief name to another. That is, if a person's responsibilities include taking over for a former staff, user, or solicitor, then use this procedure to update fields to the new person's brief name.

- There are two parameters for this procedure: Old Brief Name and New Brief Name. The New Brief Name must be at least of the same type(s) as the Old Brief Name. For example, if the Old name is a User and an Employee, then the New Brief Name must also be a User and an Employee; the New Brief Name could also be a solicitor, and that would still be acceptable.

- The new person's brief name must already be created before you run this procedure.

- This procedure updates only those fields in TA designated as "responsibility" fields. The accounts themselves do not change in any way (privilege structures and user groups are not modified), nor are any fields used for auditing or record keeping purposes changed.

List of responsibility fields according to brief name function and corresponding screens where they reside

Brief Name Function	Screen Name	Field Name
EMPLOYEE	Account Overview	Staff
EMPLOYEE	Account Project Entry	Additional Staff
EMPLOYEE	Activity Entry	Staff Responsible
EMPLOYEE	Campaign Entry	Staff Responsible
EMPLOYEE	Effort Entry	Staff Responsible
EMPLOYEE	Initiative Entry	Staff Responsible
EMPLOYEE	Account Diary Entry	SENDER* Not sure
EMPLOYEE	Name Entry	Staff
EMPLOYEE	User Defined Output Entry	Alternate Sender
EMPLOYEE	Query Output Schedule	Requested by
EMPLOYEE	User Defined Output Entry	Sender
EMPLOYEE	Project Code Entry	Additional Staff
EMPLOYEE	Source Code Entry	Staff Responsible
SOLICITOR	Account Activity	Account Manager
SOLICITOR	Account Project Entry	Account Manager
SOLICITOR	Campaign Entry	Solicitor
SOLICITOR	Effort Entry	Solicitor
SOLICITOR	Initiative Entry	Solicitor
SOLICITOR	User Defined Output Entry	Alternate Sender
SOLICITOR	Query Output Schedule	Requested by
SOLICITOR	User Defined Output Entry	Sender

SOLICITOR	Project Code Entry	Account Manager
SOLICITOR	Project Code Entry	Additional Solicitor
SOLICITOR	Project Code Entry	Primary Solicitor
SOLICITOR	Project Code Entry	Steward
SOLICITOR	Source Code Entry	Solicitor
USER	Batch Summary Entry	USER_NAME
USER	Query Output Schedule	Requested by
USER	User Defined Output Entry	Owner
USER	Query Entry	Owner

Related Procedure:

Change Brief Name

Duplicate Detection Procedure

The Duplicate Detection procedure scans an entire or partial database to identify possible duplicate accounts. The procedure loads these duplicates into the Merge Accounts area, where you can analyze them on screen or with the Merge Detail report to determine if the accounts are true duplicates.

Procedure Summary

TA searches for account records based on the parameters you enter for the procedure, and finds possible duplicates for each. For any pair of accounts with a search "score" above the system preference Cutoff Score for Exact Matches, TA creates a merge record with a status of "RE" (Review for Exact Duplicate). TA creates a merge record with a status of "RP" (Review for Partial Duplicate) for any pair of accounts with a score below the system preference Cutoff Score for Exact Matches, but above the system preference Cutoff Score for Partial Matches.

Note: TA always makes the account with the lower Account ID the retained account.

Once you run the Duplicate Detection procedure, you can view the merge records that TA creates on the Merge Entry screen. TA automatically runs the Duplicate Detection report listing the counts of partial matches and exact matches found. You can also run the Merge Detail report to view the merge records TA created through this procedure.

The following types of records are **excluded** when you run the Duplicate Detection procedure:

- Deleted accounts

- Record combinations already stored in the Merge Account tables

- Name records with a first name but not a last name

- Address records missing either a ZIP Code or both a street number and a street name

See Also:

Parameters (Duplicate Detection)

Parameters (Duplicate Detection)

You set the following parameters for the Duplicate Detection procedure.

Parameter	Description

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Parameter	Description
Account ID – Range Start	You can select a range of Account IDs within which the procedure should look for duplicates. Enter the first Account ID for this range.
Account ID – Range End	You can select a range of Account IDs within which the procedure should look for duplicates. Enter the last Account ID for this range.
ZIP Code – Range Start	You can enter a range of ZIP Codes within which the procedure should look for duplicates. Enter the first ZIP Code for the range.
ZIP Code – Range End	You can enter a range of ZIP Codes within which the procedure should look for duplicates. Enter the last ZIP Code for the range.
Activity Type?	You can enter an activity type for which the procedure should limit the accounts considered as possible duplicates. For example, enter "A" for annual giving to scan only accounts involved in that activity type.
Current Activity?	You can enter a current activity for which the procedure should limit the accounts considered as possible duplicates. For example, enter "AM" for annual giving, basic membership to scan only accounts with that current activity.
Giving Level?	You can enter a giving level for which the procedure should limit the accounts considered as possible duplicates.
Cutoff Score for Exact Matches	You can set these parameters to a number between 1 and 100 to indicate the percentage weight (scoring) TA should use when finding potential matches. The values that you enter here can be different than what is entered for your organization's data Entry system preference for Cutoff Score for Exact Matches and Cutoff Score for Partial Matches to allow for differences between what is found during data entry (or uploads) versus when the Duplicate Detection procedure is run.
Cutoff Score for Partial Matches	
Output Destination	Set this parameter to the destination for the procedure's reports (i.e., PRINTER, FILE, or PREVIEW).
Printer	Set this parameter to the printer name, if the Output Destination parameter is set to "PRINTER."
Print Format	Set this parameter to the desired output format for the reports (e.g., PDF or PostScript).
Report Path	Enter the directory path for the procedure's reports.

Perform Data Maintenance

The Perform Data Maintenance procedure enables your organization to either delete or inactivate records. You can delete the following types of records from tables that fall within the following categories:

- Data from processed batches and gift-related error tables

- Records from the Merge Errors table

- Data from inactive or expired classifications

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- Guide interaction records (i.e., those interactions with the interaction category set to "BE" for Benefit Sent and the interaction type set to "GDE" for Guide)

    Note: Guide interaction records are deleted through the End of Month procedure if the deletion set is less than 10 percent of the table records. If the deletion set is greater than 10 percent, you must delete guide interactions through the Perform Data Maintenance procedure. If you are going to delete guide interactions through this procedure, TSI recommends that you disable the field-level or column data auditing trigger beforehand. Contact TSI for assistance when disabling this trigger.

You can inactivate records from the following tables:

- Classifications

- Interests

- Relationships

Note: You cannot purge and inactivate at the same time; to both inactivate and purge, you must schedule and run the Perform Data Maintenance procedure twice.

After running the Perform Data Maintenance procedure, you can view the counts of records deleted or inactivated in the listener log.

Note: Do not run the Perform Data Maintenance procedure when users are logged on to TA.

See Also:

Parameters (Perform Data Maintenance)
Purge Functionality (Perform Data Maintenance)
Inactivate Functionality (Perform Data Maintenance)

Parameters (Perform Data Maintenance)

You set the following parameters for the Perform Data Maintenance procedure.

Parameter	Description
Action	The action determines whether this procedure deletes (purges) data or inactivates it. TA defaults this parameter to "Purge." To inactivate records, you can set this parameter to "Inactivate."
Action Date	Enter the date to use for the procedure. Records with this date or older than this date are purged or inactivated (depending on the action set in the Action parameter) from the tables that the procedure considers.

Parameter	Description
Record Type(s) to Update	Enter a comma-separated list of record types that this procedure should update. You can press the [F9] key for a list of record types.
	If you set the Action parameter to "Purge," you can enter the following table categories in the Record Type(s) to Update parameter: Batches, Merge Errors, Classifications, and/or Guide Interactions.
	If you set the Action parameter to "Purge," you can enter the following table categories in the Record Type(s) to Update parameter: Classifications, Interests, and/or Relationships.

Purge Functionality (Perform Data Maintenance)

If you set the Action parameter to "Purge," you can enter the following table categories in the Record Type(s) to Update parameter: Batches, Merge Errors, Classifications, and/or Guide Interactions.

Batches

If you set the Record Type(s) to Update parameter to Batches, TA deletes all records from the Batch Summary table for which the processed date is on or before the action date entered as a parameter. TA then deletes all records from the remaining child tables for which a Batch Summary record no longer exists. The child tables are as follows:

- PROCESSED_BATCH_DETAIL

- PROCESSED_BATCH_CREDITS

- PROCESSED_BATCH_BENEFITS

- PROCESSED_BATCH_GIFT_MATCHES

- PROCESSED_BATCH_SCHEDULE

- PROCESSED_BATCH_STOCK_GIFT

- BATCH_DETAIL_ERROR

- GM_ERROR_LOG

Merge Errors

If the Perform Data Maintenance procedure is run to purge records from the Merge Errors table, the procedure deletes records for which the Run Date is on or before the date entered in the Action Date parameter.

Classifications

If the Perform Data Maintenance procedure is run to purge records from the Classifications table, the procedure deletes records with an inactive status that were last updated on or before the action date, and classifications with any status that have an end date on or before the action date.

Guide Interactions

Note: TSI recommends that you disable the column (or field-level) Auditing trigger before running the Perform Data Maintenance procedure to delete guide interactions. Contact TSI for assistance when disabling this trigger.

If the Perform Data Maintenance procedure is run to purge Guide Interaction records, the procedure deletes interactions with an interaction category of "BE" (Benefit Sent) and an interaction type of "GDE" (Guide) that have an interaction date on or before the action date.

Note: If you ran the End of Month procedure and the guide interaction deletion set was larger than 10% of the table records, the listener log indicated the value to which you should set the Action Date parameter on the Perform Data Maintenance procedure to get the same result.

Inactivate Functionality (Perform Data Maintenance)

If you set the Action parameter to "Inactivate," you can enter the following tables in the Record Type(s) to Update parameter:

- Classifications

- Interests

- Relationships

For all records in the selected table(s), the procedure inactivates records with an active status that have an end date on or before the action date.

Start Queues

The Start Queues procedure enables you to start one or more queues from TA. This procedure can only be scheduled through the Schedule Administration screen, and contains one parameter: Queue Numbers/Categories. Enter a comma-separated list of processing queues, virtual queues, and/or queue categories to start. TA starts the processing queues that are explicitly specified, as well as those that are associated with the virtual queues and queue categories specified.

The Start Queues procedure can be scheduled to any queue type (processing, virtual, or maintenance). To ensure that the procedure will run immediately, schedule it to the maintenance queue (Queue 0). To have the procedure run when certain other procedures have finished, schedule it to the processing queue to which those procedures are scheduled.

TSI recommends that when you start up your database, you use the syuplsnr.srv script to start Queue 0, and then run the Start Queues procedure to start the rest of your queues. Scheduling the Start Queues procedure on Queue 0 for a time prior to when you actually expect the database to be started again ensures that the rest of the queues start up as soon as Queue 0 is started.

Shut Down Queues

The Shut Down Queues procedure enables you to shut down processing queues and the maintenance queue from TA. This procedure is only available through the Schedule Administration screen.

This procedure can be scheduled to any queue type (processing, virtual, or maintenance). To ensure that the procedure will run immediately, schedule it to the maintenance queue (Queue 0). To have the procedure run when certain other procedures have finished, schedule it to the processing queue to which those procedures are scheduled.

See Also:

Parameters (Shut Down Queues)

You set the following parameters for the Shut Down Queues procedure.

Parameter	Description
Mode	There are three valid values:

"STANDARD"—Shuts down the specified queues after any operations they are currently running finish.

"IMMEDIATE"—Shuts down the specified queues immediately, killing any operations that are currently running using the standard kill mechanism (which kills the operations' Oracle® session). This mimics what shutting down the database in IMMEDIATE mode would accomplish.

"ABORT"—Shuts down the specified queues immediately, killing any operations that are currently running using the standard kill mechanism (which kills the operations' Oracle® session), and killing the operating system process. This mimics what shutting down the database in ABORT mode would accomplish. Only run the Shut Down Queues procedure in ABORT mode when absolutely necessary! (See the "Recommendations (Shut Down Queues) " section for more information.)

Parameter	Description
Queue Numbers /Categories	Accepts a comma-separated list of processing queues, virtual queues, and queue categories to shut down, or "ALL" (which means all processing queues). TA shuts down the processing queues that are explicitly specified, as well as those that are associated with the virtual queues and queue categories specified.
Shutdown Maintenance Queue?	Valid values are "Y" or "N." Entering "Y" shuts down the maintenance queue after shutting down the queues specified by the Queue Numbers/Categories parameter. The maintenance queue will only be shut down if all processing queues are either inactive or marked for shutdown at that point.
Reschedule Killed Operations?	Valid values are "Y" or "N." If the Mode parameter is set to "IMMEDIATE" or "ABORT," entering "Y" reschedules any operations that were killed based on either their old run date or the specified values for the New Run Date and New Run Time parameters.

> **Note:** The operations that are unsafe to kill will not be automatically rescheduled by the Shut Down Queues procedure if they are killed. See "Implications of Killing Active Operations " for the list of operations that are unsafe to kill.

Parameter	Description
New Run Date	Valid values are absolute or relative calendar dates (e.g., "05/19/00," "T" for today). If the Mode parameter is set to "IMMEDIATE" and the Reschedule Killed Operations? parameter is set to "Y," entering a value for this parameter sets the date portion of the run date on any rescheduled operations to the entered value.

Parameter	Description
New Run Time	Valid values are times in HH24:MI:SS format (e.g., 22:00:00). If the Mode parameter is set to "IMMEDIATE" and the Reschedule Killed Operations? parameter is set to "Y," entering a value for this parameter sets the time portion of the run date on any rescheduled operations to the entered value.

Recommendations (Shut Down Queues)

TSI recommends that you use ABORT mode on the Shut Down Queues procedure only in situations when you intend to shut down the database following the Shut Down Queues procedure. In all other cases, use either STANDARD or IMMEDIATE mode. Running the Shut Down Queues procedure in ABORT mode returns control to the queue running a killed operation before that killed operation has completely rolled back any uncommitted changes it may have made. To continue processing in such a situation could lead to deadlocks and "resource busy" errors. As such, the TA listeners have been enhanced to treat aborted operations as marked for kill (instead of killed) as long as the operation is still rolling back. This will prevent premature resumption of processing when the database is not shut down after operations are aborted. However, in cases where the database is shut down, there is no longer any trace of the killed Oracle® session, despite the fact that cleanup may still be in progress.

Before you shut down your database at any time, in order to properly shut down your queues and avoid errors upon restart, run the Shut Down Queues procedure with the Queue Numbers/Categories parameter set to "ALL," the Mode parameter set to "ABORT," and the Shutdown Maintenance Queue? parameter set to "Y." Doing this maintains the integrity of the queues themselves, any processes that were running, and any data that was in use at the time.

You have two options for how to do this:

- Run the qmstpall.srv script at the beginning of your backups. This will run the Shut Down Queues procedure with the settings recommended above and exit when all the queues have successfully shut down.

  Note: "qmstpall.srv" is a UNIX script, and will not work for clients using a Windows NT server. Contact TSI for assistance if you are using Windows NT.

or

- Submit the Shut Down Queues procedure with the settings recommended above through the Schedule Administration screen with an appropriate time and frequency, such that the procedure will run before your backups. When you schedule the procedure, allow enough time so that each queue has two minutes to shut down before your backups are scheduled to begin.

TSI recommends the first method, because we feel it is safer and easier to directly link the shutdown of the queues with your backup procedures.

Touchpoint Notification

You can set up TA so that you are notified if changes are made to certain accounts. Use the Touchpoint User Notification Entry screen to determine the specific accounts, the level of changes that you want to be notified about, and the frequency with which you should be notified.

Insert the Touchpoint Notification Process into the schedule if your organization wants to offer this feature to your users. This process has no parameters. Executing the notification process generates the Touchpoint Notification Report for all users who have information entered in the entry screen.

About the Touchpoint Notification Report

The notification report contains a listing of each account (Account ID and Name), Table name, Staff that performed the change, date of the change and Current value and Action performed (such as ZIP CODE was changed from

09832 to 09823). The report captures changes since the last time that the process was automatically run (as defined by the frequency in the entry screen) or changes that occurred to the selected accounts within the date range specified if you run the report ad-hoc (from the Main Menu). The sorting is determined by criteria line (as defined in the Notification Entry screen) and within that by account ID and alpha name. The report is generated to your user's output directory.

The report parameters are User Name, and Start and End Date. You may get an error message or a blank report if you specify a user who does not have information entered in the Touchpoint User Notification Entry screen.

Using the Touchpoint Notification Entry screen

- Each line in the Touchpoint User Notification Entry screen represents a set of or group of accounts that you want to be notified about and the level of information that you want to know about the selected accounts. For example, to select two different groups of accounts, you would have two lines. Press [F9] in any of the fields to make your selections.

- If you want to be notified of the following account-based changes you must enable and set up the Field Level Auditing: Names, Addresses, Telephones, Email, and Classifications. Use the Field Level Auditing Configuration screen to determine the specific fields that you want to track. The field level auditing feature determines the level of detail that you are notified about. For example, if a user changes the middle name on one of your accounts, and you do not have field level auditing set up to capture middle name changes, then you are not notified if this change occurs. See Field-Level Auditing Configuration for more information.

- As part of the Account-based information, you are notified if any of your accounts are sent solicitations. That is, if any interaction containing a source code is created for any of the accounts that you have specified then you can receive notification. (Field level auditing does not need to be set up for this solicitation notification.)

Touchpoint User Notification Entry Field Descriptions

Sample lines for the Notification Criteria:

CLASSIFICATION CODE = ANONYMOUS   All Changes
ACCOUNT ID = 5002525, 5007643   Account Changes
LARGEST GIFT AMOUNT >= 10,000   Transactions

Field Name	Description
Notification Frequency	Press [F9] to specify how often you want to review the notification report. Examples of your choices are: Daily, Weekly, Week Days, etc. The report displays information that was changed since the last run of the report. Leave this field blank if you do not want to receive any notification report.
Criteria Field Name	Enter how you want to select the accounts that you want to be notified about: **Classification Code**: Use this if you want accounts that have (or don't have if you use the <> operator) a particular classification code. **Account ID**: Use this if you want to enter the specific Account IDs that you want notification about. **Staff**: Use this to select accounts according to a particular staff User ID that is entered in the Staff field on the Account Overview screen. **Largest Gift Amount**: Use this to select accounts according to gift amount that is stored on the cumulative account activity record (*).
Operator	Use this field in conjunction with Criteria Field Name to select the accounts that you want to be notified about. Your choices are: =, < > (not equal), >, >=, <, <=, BETWEEN, and LIKE.
Criteria Value	Enter this field according to the accounts that you want to select and how you entered the previous two fields. For example, enter a specific classification code, account ID, Staff User IDs, or Gift Amount. Note that you can use % (the wildcard) if you used the LIKE operator in the previous field.

Notify About	Select a value for this field according to the level of information that you want to know about:
	Account-Related Changes: Select this if you want to be notified of these account-based changes: Names, Addresses, Telephones, Email, Classifications, and solicitations.
	Transactions: Select this if you want a summary of posted and unposted transactions on the account.
	All Changes: Select this if you want both account-based and transaction-based information.

Tracking Shipments Between Offices

If your organization regularly sends files or submittals to another one of your offices, you can use the Submittal Entry, Shipment Entry, and Shipment Receiving Entry to track where these items are in your process. For example, you can track when they were shipped, when they were received, and confirmed, and assigned to data entry staff. This functionality is not the same as tracking shipments of benefits or benefit inventory. See Entering Inventory Information for a Benefit for more information on this feature.

Screen Name	Examples of What you can Track	When Used
Submittal Entry	Total Amount, Credit Account, Event, Affiliation, Total Pieces, Total Checks, Cash Amount, Source. You can also enter 'mixed' submittals for example, where you have one submittal with different credit accounts and amount combinations.	Use this screen when you need to create submittal items.
Shipment Entry	Submittal items in the shipment, Staff, Shipper, Tracking Number, Sent Date, Date Received, and confirmed receipt.	Use this screen to create a shipment when you need to bundle the submittals into a shipment. Also, after the shipment is received you can use this screen as a quality control step to confirm that the shipment actually contained what the submittal detailed. Confirmed submittals can be added to a batch.
Shipment Receiving Entry	This screen serves as a receiving log. Enter the shipper and TA displays a list of tracking numbers (or shipment records) that correspond. TA defaults the Date Received date to today's date.	Use this screen to capture that your office has received a shipment.

Grouping Submittals into Batches

You can track the submittals that are associated with the specific batch that they were entered into TA by using the Submittals tab on the Batch Summary Entry screen. Only submittals that are in a confirmed status can be linked to a batch. Create a batch and use the Submittal tab to enter the items that are linked to the batch. See Creating a Batch or Field Descriptions on the Batch Summary Entry Screen for more information about using the Batch Summary Entry screen.

Working with Submittals and Shipments

Use the Submittal Entry screen to create the bundles that you will be shipping to another one of your offices. Use the Shipment Entry screen to add all of the submittals that will be included in the shipment.

How to Create New Submittals

When you create a new submittal record TA sets the Status to N (New - not shipped). Click here if you want descriptions of each field on the Submittal Entry screen.

- Access the Submittal Entry screen. If you are on an existing submittal record you can click on the <New> icon. TA automatically displays the Create New Submittal window when you first access the screen. Your User ID defaults in the **Staff** field. If the Affiliation field is entered on the Account Overview screen for which your User ID is associated, then TA defaults the **Affiliation Category** field. You may change the Staff field if you are creating a submittal for another user. Enter the Category field according your organization's business practices.

- Enter the fields in the **Submittals tab** according to what you are sending to your office and according to your business practices. Press [F9] in most fields to select a value.

- Enter the fields in the **Items tab** only if you have items within the submittal where you want to differentiate the items such as to specify and Account ID or Name, or if items in the submittal contain different Credit Accounts. The Item total that you enter in the Items tab must equal the Total Amount that you entered in the Submittal tab.

- When you want to add submittals to a shipment (create a shipment record), click on <Shipments> or access the Shipment Entry screen.

Finding Previously Created Submittals

From the Submittal Entry screen, access the Find Submittals window. You can search for submittals using any combination of the fields listed below. You can press [F9] in any of these fields to select a value.

Submittal Number

Staff

Affiliation

Category: Affiliation category; Note if you select an Affiliation then this field defaults.

Event

Type (Submittal type)

Shipped: The options are Shipped Submittals, Not Shipped Submittals, or Both Shipped and Not Shipped Submittals

How to Create Shipments

Create new shipment records so that you can track the submittals included in a shipment and the date that you sent it to your other office. Once the shipment record is created, your colleagues can track the date the shipment was received and then link submittals to batches of transactions. Click here if you want descriptions on each field in the Shipment Entry screen.

- TA automatically displays the Create New Shipment Record window when you access the Shipment Entry screen. The window defaults to today's date for **Date Sent**, your **User ID**, and **Affiliation Category** if the Affiliation field is entered on the Account Overview screen for which your User ID is associated.

  The **Submittals to Include** block automatically includes any submittals that are not already included in a shipment.

- In the Create New Shipments window, mark the checkbox for those submittals to be included in the shipment. (Those submittals that you created are marked by default.) Adjust the Date Sent field if necessary. If you are creating a shipment record for another user, update the Staff and Affiliation category fields accordingly. Click <Create>. You can add submittals to the shipment (if necessary) after the shipment record has been created.

- TA automatically updates the Status field to S (Sent) once you create the record. Enter fields on the **Shipment tab** such as Shipper, Tracking Number, and Destination according to your business practices. Use the **Submittals tab** to add submittals to the shipment if necessary. (The submittal records must be previously created in order to add them to the shipment.)

Finding Shipments

From the Shipment Entry screen, access the Find Shipments window. You can search for shipment records using most combinations of the fields listed below. You can press [F9] in these fields to select a value.

Shipment Number

Submittal Number

Staff

Category: Affiliation category

Shipper

Tracking Number

Status: The options are Sent, Received, Confirmed, Processed, Deleted

Date Received (Date Range)

Grouping Submittals into Batches

You can track the submittals that are associated with the specific batch that they were entered into TA by using the Submittals tab on the Batch Summary Entry screen. Only submittals that are in a confirmed status can be linked to a batch. Create a batch and use the Submittal tab to enter the items that are linked to the batch. See Creating a Batch or Field Descriptions on the Batch Summary Entry Screen for more information about using the Batch Summary Entry screen.

See Also:

Submittal Entry Screen Field Descriptions

Shipment Entry Screen Field Descriptions

Submittal Entry Screen Field Descriptions

The chart below provides descriptions of each field that is displayed on the Submittal and Items tabs in the Submittal Entry screen. Enter fields according to your organization's business practices. You can press [F9] in most fields.

Field Name	Description
Submittal Number	TA automatically assigns this number when you create the submittal.
Date Entered	This is the date that you created the submittal record. TA automatically updates this field. You cannot update it.
Status	TA automatically changes the status of the submittal record to the status's described below depending upon where it is in your process: **New**: New submittal created. **Sent**: TA changes it to this status once the submittal has been added to a shipment. **Received**: TA changes it to this status once you use the Shipment Receiving Entry screen to indicate that the shipment containing this submittal was received. **Confirmed**: It has been confirmed that the submittal was included in the shipment. **Exception**: The submittal was missing from the shipment. **Deleted**: A user indicated that the submittal should be deleted.
Submittal Tab	
Staff	Staff person who created or is responsible for the submittal.
Category	Affiliation category to which the submittal corresponds.
Affiliation	This field defaults if you selected a category in the previous field.
Event	If the submittal corresponds to an event, specify and event code.
Source	Enter a source code if it applies; note that you must enter the first few characters of the source code before you can press [F9] to access the list of values.
Credit Account	This field may default if your organization validates event code and credit account combinations. Otherwise, press [F9] to select a credit account for which the submittal applies. Note: If the Items tab includes a submittal with a different Credit Account, then TA displays "<Split>" in this field.
Type	Submittal types such as cash and checks, credit card, zero-dollar, or matching gifts that you're your

	organization has defined.
Total Amount	Enter the total dollar amount included in the submittal.
Cash	If the submittal includes cash, enter the cash amount here. Note that this is subtotal of the Total Amount field.
Total Pieces	Total number of items in the submittal
Total Checks	Enter the number of checks in the submittal.
Batch Number	This displays if the status of the submittal is Confirmed and if the submittal has been assigned to a batch summary record.
Comments	Enter any text information the further captures more information about the submittal.
Items Tab	*Use the fields in this tab to indicate itemized subtotals for the submittal, entering as many lines as needed to describe submittals with mixed contents. For each line, any of these fields could be filled in. All are optional, though if Amount is filled in, at least one other field must be filled in (any field).* *Note that TA validates that the* **Item Total** *must equal the* **Submitted Total**.
Account ID Name	You can enter a name without an Account ID or enter the Account ID if the submittal item corresponds to a known account. Press [F9] to find an account or click in the Name field and enter the name that originated the submittal item.
Credit Account	Note that this field may default if your organization validates event code and credit account combinations. Otherwise, press [F9] to select a credit account for which the submittal applies. If Credit Account was entered on the Submittal tab and you enter a different Credit account here, then TA displays "<Split>" in the Credit Account field of the Submittal tab.
Amount	Enter the amount of the submittal item
Item Total Submitted Total	TA calculates these fields according items you have entered on this tab (Item Total) and the Total Amount field entered on the Submittal tab.

Shipment Entry Screen Field Descriptions

The chart below provides descriptions of each field that is displayed on the Shipment and Submittal tabs in the Shipment Entry screen. You can press [F9] in most fields.

Field Name	Description
Shipment Number	TA automatically assigns this number when you create a shipment record.
Status	This field indicates where the shipment is in the process: **Sent**: TA changes it to this status once the submittal has been added to a shipment. **Received**: TA changes it to this status once you use the Shipment Receiving Entry screen to indicate that the shipment containing this submittal was received. **Confirmed**: It has been confirmed that the submittal was included in the shipment. Only submittals that are in a confirmed status can be added to a batch. **Exception**: The submittal was missing from the shipment. **Processed**: If submittals have been added to a batch and the batch has a status of Processed (transactions have been posted).
Shipment Tab	*Use this tab to store important information about the shipment.*
Staff	Staff person who created or is responsible for the shipment.
Category	Affiliation category to which the shipment corresponds.
ZIP, City, State	This field defaults to the Staff person's preferred address, but you can overwrite this field if necessary. The City and State field are populated automatically when you enter a valid ZIP.
Shipper	Shipping methods as they are set up for your organization. This field defaults the Shipment Method from most recently created shipment record for this Affiliation

	Category.
Tracking Number	This is a text field where you can enter the tracking number that corresponds to this shipment.
Date Sent	This field defaults to today's date when you create the shipment record. You can change this date if necessary.
Type	Submittal types such as cash and checks, credit card, zero-dollar, or matching gifts that you're your organization has defined.
Destination	This is a text field where you can enter the specific destination if it different among your shipments. You can leave this field blank if all of your shipments go to the same location or you can use it to store the physical location or path for a file transfer.
File Name	This field can be used to store the file name if you are tracking file transfer information.
Date Received	This field is automatically updated if the shipment has been received (using the Shipment Receiving Entry screen.)
Comments	A text field that can be used to record any additional information about this shipment.
Submittals Tab A user preference determines whether you are allowed to confirm the shipment.	*Use this tab if you want to add additional submittals to the shipment that you have created. Click on a blank line and press* [F9] *to add a submittal.* *Also you this tab if you want to* **confirm** *that that the shipment contained the items. (This is task is usually done by staff who receive the shipment.) If you will be assigning submittals to a batch, then you must confirm the submittals.*
Receipt Confirmed for All Submittals Checkbox Confirmed checkbox	Unmark any checkbox that corresponds to a submittal that was not included in the shipment. TA automatically changes the status of the particular submittal to Exception if this is the case. Click on ' Receipt Confirmed for All Submittals' to mark all submittals at once or to set the Shipment to a confirmed status. Mark the Confirmed checkboxes to the right to indicate individual confirmation.
Submittal Number	Corresponds to submittal records that have been created and have not already been included in a shipment.
Event	If the submittal record included an event code, it is displayed in this column.
Staff	The staff person who created or is responsible for the submittal record.
Total Amount	The total amount that was entered when the submittal record was created.

Tracking the Shipment: Updating Received Date and Confirmed Receipt

Use the **Shipment Receiving Entry** screen to log that your office received a shipment. This is simple screen where you select who you received the shipment from (Shipper such as UPS Overnight, UPS Next Day Air). TA defaults today's date in the Date Received field and other information about the shipment (such as Tracking number, City, State, and Affiliation Category).

- Click on a blank line and press [F9] in the **Shipper** field and select how you received the shipment. Update the Date Received field if necessary.

Use the **Shipment Entry** screen if your organization includes the quality control step of assuring that the contents of the shipment match with what was entered for the submittals. This confirmation step is required if you plan to assign submittals to a batch.

- Access the Shipment Entry screen and find the particular shipment that you want to confirm. Click on the Submittals tab and mark the **Receipt Confirmed for All Submittals** if all submittals are correct. Or mark the **Confirmed checkbox** next to a particular submittal for those that match and leave unmarked the submittals where you need further information.

  The Allow user to confirm shipment receipt user preference determines whether you are allowed to confirm the shipment.

- Use the **Comments** field on the Shipment tab if you want to capture additional information or communicate information about the shipment to your colleague.

- You may access the Submittal Entry screen if you need to look up how a specific submittal was set up.

Grouping Submittals into Batches

You can track the submittals that are associated with the specific batch that they were entered into TA by using the Submittals tab on the Batch Summary Entry screen. Only submittals that are in a confirmed status can be linked to a batch. Create a batch and use the Submittal tab to enter the items that are linked to the batch. See Creating a Batch or Field Descriptions on the Batch Summary Entry Screen for more information about using the Batch Summary Entry screen.

Related Topics:

Shipment Entry Screen Field Descriptions

Submittal Entry Screen Field Descriptions

Working with Submittals and Shipments

Adding Your Own Reports, Procedures, and Screens to TA

Version 5.0x includes new screens to permit you to build an interface between TA and applications outside of TA. Applications can include other report builders (such as Crystal Reports®) or your own custom SQL script that executes operating system commands, such as file transfer. We recommend that you contact TSI before using this feature so that we can consult about the specific configuration. Note: it is expected that only system administrators would use this feature.

> **User-Defined Operation Entry:** Use this screen first to create the operation that you want to access in TA. Here you define properties such as whether you are adding a report, procedure, or a screen, the order that parameters are listed, and the specific location in TA that the operation displays.

> **User-Defined Parameter Entry:** Use this screen to define the specific parameters that users can enter when they run your customized report, procedure, or screen. You'll need to go back to the User-Defined Operation Entry screen and use the Parameters tab to specify the exact order that parameters display to your users.

See Also:

About the User-Defined Operation Entry Screen

About the User-Defined Parameter Entry Screen

About the User-Defined Operation Entry Screen

This screen permits you to create customized operations that display in TA. Please consult with TSI before you use this screen. Here is some basic information about using this screen:

- When you create a new operation it must begin with **UD**.

- Operation Type: You cannot change this once you create the operation. Select Output Report if you want to be able to run the report with a query. Other options include Report, Procedure, Update Procedure, and Custom Output.

- Use the Parameters tab to determine the order that parameters are listed. (Use the User-Defined Parameter Entry screen to create your custom parameters.) If you want to rearrange the order that parameters are listed, highlight the parameter and click on the Up or Down button to move it to the location that you want.

- Use the Menu tab to specify the Module under which your operation should be listed. Highlight the module where you want it displayed and click the on the right side of the screen to specify the exact location within the module. If you make a mistake, click <Remove from Menu>.

User-Defined Operation Entry Fields

Field Name	Description
Description	The text that you enter here determines the name of the operation that users see in TA.
Operation to Call	For report-based operations, this could be the name of your report. Note that you can link your custom operation to the ad-hoc processing operation (SYSCRRUN).
Report Parameter checkbox	If marked for a procedure, TA will automatically include the standard TA report procedures: Output Destination, Print Format, Printer Name, Copies, Filename. This is automatically marked for Report procedures.
Character Mode checkbox Server Exclusive checkbox	Mark these only if you are creating an operation for an Oracle report. Server Exclusive determines if the View button is enabled on the parameters screen.
Schedule block Queue Number Schedule Order Schedule Flag Frequency Checkbox fields: Continue After Error? Automatic Restart? Run Simultaneous?	These field settings determine what defaults on the System Preference Administration screen for the custom operation. Use the hint text for further information

About the User-Defined Parameter Entry Screen

This screen permits you to create customized parameters for your customized operations that display in TA. Please consult with TSI before you use this screen. Here is some basic information about using this screen:

- Your customized operation must already be created before you can add use this screen to create parameters.

- This screen is modeled after the Attribute Definition Entry screen where you create the particular variables and the validation rules of the item. Click here for field descriptions that are available on both screens.

- Display checkboxes: Unmark Displayed TA? And Updatable TA? if you are creating a hidden parameter. The last three checkboxes correspond to what is set to Y or N in the System Preference Administration Entry screen for the DUP, UUP, and AWS columns.

- Use the **Goto Screen** field if you want TA to navigate the user to a particular screen if he or she is on this parameter.

- After you create your custom parameters, click <Operations> to return to the User-Defined Operation Entry screen and adjust the order that parameters display to your users.

Circular References (Delete Processing)

If circular references exist, for example table A references table B, and table B references table A, neither can be placed in a given level. The solution is to place these tables in the SAME level. Special handling has been written into delete processing to handle these circularly referenced tables. In short, if two or more records are marked D in tables that are part of a circular reference, then those records are considered as a "set", and either all of them are deleted (if all of them are deleteable) or none of them are (if any one is not deleteable).

Multi-value fields (Delete Processing)

If a given field contains a comma-separated list of values where each value is actually a reference to a record in another table (e.g., Giving Level Gift Types in the Activity Type table contains a list of Gift Types), then parse the comma-separated list and handle each value individually.

Non Delete-able Tables (ND)

This status is required so that delete processing can ignore this row in future runs. This update is only performed in cases where the reference is through primary key fields (such as Transactions in Transaction Benefits), and as such the reference and the record cannot be deleted.

Period Dates & Period Amounts

For each activity type you set up, you can define four periods for which you want to track the amount of money pledged aside from the periods automatically tracked by TA. TA tracks the calendar year, fiscal year, and member year totals; often the period dates track the quarterly periods by calendar year. All of these amounts are calculated and stored on each account activity record for an account.