

Oracle's PeopleSoft 8 SP1 Contributor Relations Changes and Updates to PeopleSoft Contributor Relations

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PeopleSoft Contributor Relations Documentation Updates for SA Bundle #13

Note. This document is an update to the *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*. It describes the Product Update ID #613403 that was posted to Customer Connection in May 2006. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document discusses changes related to updates and fixes delivered with SA Bundle #13. Specifically, it discusses how to:

- View profiles.
- Establish relationships.

See Also

PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook, “Managing Constituent Data,” Viewing Profiles

PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook, “Setting Up Constituent Data,” Establishing Relationships

Viewing Profiles

This section discusses changes to the way the system displays information on the Person Profile and Organization Profile pages.

Pages Used to View Profiles

Page Name	Object Name	Navigation	Usage
Person Profile	AV_PRSN_PROFILE AV_PRSN_PROFILE_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Person Profile • Manage Contributor Relations, Manage People, Workset, Person Profile • Outreach, Outreach Officer, View Prsn, Person Profile • Outreach, Outreach Officer, View Lists, Person Profile 	View summary information about a constituent who is a person, without having to navigate through the menus in the system.

Page Name	Object Name	Navigation	Usage
Organization Profile	AV_ORG_PROFILE AV_ORG_PROFILE_W	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Organizations, Inquire, Organization Profile, Organization Profile Manage Contributor Relations, Manage Organizations, Workset, Organization Profile 	View summary information about a constituent that is an organization.

Viewing a Biographic Profile

Access the Person Profile page, Biographic Profile view.

The **Address Type**, **Phone Type**, and **Email Type** fields now only display types for which the person has populated information.

Viewing Organization Details

Access the Organization Profile page, Organization Detail view.

The **Phone Type** field now only displays phone types for which the organization has populated information.

Establishing Relationships

This section discusses changes to how the system displays relationship address information.

Pages Used to Establish Relationships

Page Name	Object Name	Navigation	Usage
Address Detail	AV_PE_REL_ADDR_SE C	<ul style="list-style-type: none"> Click the Address link on the Person to Org Relationships page. Click the Address link on the Org to Person Relationships page. 	Enter and view address information for a person or organization that does not have a record in the system.

Viewing Relationship Addresses

Access the Address Detail page.

Address Detail

Related ID (or Name) Address	
Country:	<input type="text" value="USA"/> United States
Address 1:	<input type="text" value="1000 Ford Drive"/>
Address 2:	<input type="text" value="Suite 100F"/>
Address 3:	<input type="text"/>
City:	<input type="text"/>
County:	<input type="text" value="Dearborn"/> Postal: <input type="text" value="48111"/>
State:	<input type="text" value="MI"/> Michigan

Primary ID Address	
Country:	<input type="text" value="USA"/> United States
Address 1:	<input type="text" value="444 Green Circle"/>
Address 2:	<input type="text"/>
Address 3:	<input type="text"/>
City:	<input type="text" value="Jackson"/>
County:	<input type="text"/> Postal: <input type="text" value="39201"/>
State:	<input type="text" value="MS"/> Mississippi

[Address Detail page](#)

Related ID (or Name) Address

This group box displays the existing address of the person or organization being related to the **Primary ID**. If the person or organization being related does not have an ID record in the system, the address fields are open for editing to add the address of the related person or organization.

Primary ID Address

This group box displays the existing address of the organization to which the **Related ID** or **Name** is being related. To add or change this address, navigate to the Person Address or Organization Location component.