

**ORACLE®**

**PEOPLESOFT ENTERPRISE**

---

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

---

**November 2006**

**ORACLE®**

## Changes and Updates to PeopleSoft Contributor Relations

Copyright © 2006, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

### U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, and PeopleSoft are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

### Open Source Disclosure

Oracle takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in Oracle's PeopleSoft products and the following disclaimers are provided.

#### *Apache Software Foundation*

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright 1999-2000. The Apache Software Foundation. All rights reserved.

THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

### *OpenSSL*

Copyright 1998-2003 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (<http://www.openssl.org/>).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

### *SSLey*

Copyright (C) 1995-1998 Eric Young. All rights reserved.

This product includes cryptographic software written by Eric Young ([eay@cryptsoft.com](mailto:eay@cryptsoft.com)). This product includes software written by Tim Hudson ([tjh@cryptsoft.com](mailto:tjh@cryptsoft.com)). Copyright (C) 1995-1998 Eric Young. All rights reserved. THIS SOFTWARE IS PROVIDED BY ERIC YOUNG "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE AUTHOR OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

### **Loki Library**

Copyright 2001 by Andrei Alexandrescu. This code accompanies the book: Alexandrescu, Andrei. "Modern C++ Design: Generic Programming and Design Patterns Applied". Copyright (c) 2001. Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation

### **Helma Project**

Copyright 1999-2004 Helma Project. All rights reserved. THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

### **Sarissa**

Copyright 2004 Manos Batsis

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

# PeopleSoft Contributor Relations Documentation Updates for SA Bundle #16

**Note.** This document is an update to the *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*. It describes the Product Update ID #613681 that was posted to Customer Connection in November 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 #16. Specifically, it discusses new delivered messages for gifts and pledges.

## See Also

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Entering Commitments"

## Creating Soft Gift Entries

This section discusses changes that allow institutions to enter soft dollar entries and soft credit-only gifts and pledges. These changes enable institutions to record gifts to the benefit of the donor.

### Pages Used to Create Soft Gift Entries

| Page Name    | Object Name     | Navigation   | Usage  |
|--------------|-----------------|--|--|
| Gift Entry   | AV_GIFT_ENTRY   | Manage Contributor Relations, Enter Commitments, Use, Gift Entry, Gift Entry   | Enter gift and pledge payment transactions into a session.                   |
| Gift Adjust  | AV_ADJ_GIFT     | <ul style="list-style-type: none"> <li>Manage Contributor Relations, Enter Commitments, Use, Gift Adjustment, Gift Adjust</li> <li>Click a Gift Nbr on the Session Detail page.</li> </ul> | Adjust an existing gift transaction you selected on the Session Detail page. |
| Pledge Entry | AV_PLEDGE_ENTRY | Manage Contributor Relations, Enter Commitments, Use, Pledge Entry, Pledge Entry   | Enter pledge transactions into the system.                                   |

| Page Name     | Object Name   | Navigation   | Usage                                  |
|---------------|---------------|--|--|
| Pledge Adjust | AV_ADJ_PLEDGE | Manage Contributor Relations, Enter Commitments, Use, Pledge Adjustment, Pledge Adjust | Adjust an existing pledge transaction. |

## Entering Soft Dollar Gifts and Pledges

The system now allows you to make soft dollar gift entries that exceed the hard dollar gift or pledge amount. Previously the system displayed an error message; that message is changed to an informational warning that allows you to continue with the transaction.

In the **Recognition** group box on the appropriate gift or pledge page, you must enter a hard credit of 0 as well as the soft credit amount on zero-amount gifts only. If a gift of securities, for example, were being recognized with soft credit at a higher level than the hard credit amount, the hard credit would equal the gift amount.

PeopleSoft delivers two new messages in the Message Catalog (PeopleTools, Utilities, Use, Message Catalog) for this transaction:

| Message Number | Message Text  | Explanation  | Condition to Appear   |
|----------------|---|--|---|
| 14305, 151     | The amount for a recognition that is not the Hard Credit recognition is greater than the gift amount. | You have entered a recognition amount greater than the amount of the gift. You may save the gift as entered or correct the amount.     | You enter a gift amount less than the soft credit amount.   |
| 14305, 152     | The amount for a recognition that is not the Hard Credit recognition is greater than pledge amount.   | You have entered a recognition amount greater than the amount of the pledge. You may save the pledge as entered or correct the amount. | You enter a pledge amount less than the soft credit amount. |

## Entering Soft Credit-Only Gifts and Pledges

You can now enter soft credit-only gifts with a gift amount of zero. However, the tender type must be set up to allow zero-dollar gifts.

In the **Recognition** group box on the appropriate gift or pledge page, you can now enter a soft credit value, up to 999% larger than the gift amount. If you enter soft credit in excess of 999 times the gift amount, the system displays an error message.

PeopleSoft delivers two new messages in the Message Catalog (PeopleTools, Utilities, Use, Message Catalog) for this transaction:

| Message Number | Message Text | Explanation | Condition to Appear |
|----------------|--------------|-------------|---------------------|
|----------------|--------------|-------------|---------------------|

| <b>Message Number</b> | <b>Message Text</b>                   | <b>Explanation</b>  | <b>Condition to Appear</b>   |
|-----------------------|---------------------------------------|---|--|
| 14305, 153            | Please reduce the Recognition Amount. | The Recognition Amount of the non-hard credit recognition exceeds 1000% of the Gift Amount.   | You enter soft credit more than 999% of the hard credit gift amount.   |
| 14305, 154            | Please reduce the Recognition Amount. | The Recognition Amount of the non-hard credit recognition exceeds 1000% of the Pledge Amount. | You enter soft credit more than 999% of the hard credit pledge amount. |