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

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**January 2007**

**ORACLE®**

## Changes and Updates to PeopleSoft Contributor Relations

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# PeopleSoft Contributor Relations Documentation Updates for SA Bundle #17

**Note.** This document is an update to the *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*. It describes the Product Update ID #656029 that was posted to Customer Connection in January 2007. 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 #18. Specifically, it discusses a new component to edit and delete constituent and prospect actions.

## See Also

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Prospects," Implementing a Prospect Plan

## Managing Prospect Actions

This section discusses how to manage constituent actions using the Action List component.

### Pages Used to Manage Prospect Actions

Page Name	Object Name	Navigation	Usage
Action List	AV_CNST_ACTN_LIST	<ul style="list-style-type: none"> <li>Manage Contributor Relations, Manage Prospects, Use, Action List</li> <li>Manage Contributor Relations, Manage Prospects, Use, Action List - Org</li> <li>Manage Contributor Relations, Manage Prospects, Workset, Action List</li> </ul>	Add, edit, and delete constituent actions, regardless of their status.

Page Name	Object Name	Navigation	Usage
Action Filter	AV_ACTN_FLTR	<ul style="list-style-type: none"> <li>Manage Contributor Relations, Manage Prospects, Use, Action List, Action Filter</li> <li>Manage Contributor Relations, Manage Prospects, Use, Action List - Org, Action Filter</li> <li>Manage Contributor Relations, Manage Prospects, Workset, Action List, Action Filter</li> </ul>	Search for specific actions pertinent to the constituent in context based on selection criteria.

## Managing an Action List

Access the Action List page.

Action List
Action Filter

Johnson, Shaqua ID: AV0020

Constituent Type: [Alumni](#) Year: 1977

Prospect Manager: Franken, Alan Institution: PSUNV


**Actions**
View All
First
1 of 1
Last

Select	Action Description	Status	Planned Date
<input type="checkbox"/>	<a href="#">Invite to Dean's Symposium</a>	Scheduled	11/20/1998

Delete
Add an Action
Refresh

### Action List page

**Note.** You can control access to this component through PeopleTools menu security.

Click the  icon to access an action list for the prospect's linked spouse, if one exists in the system.

**Action Description**

Click the linked action description to access the Prospect Action page, where you can update the constituent's action. When you are finished, the system returns you to the action list.

**Delete**

Click this button to remove the constituent's action from the system. You can only delete an action after all related data, such as assignments, strategies, and initiatives, have been removed from the action.

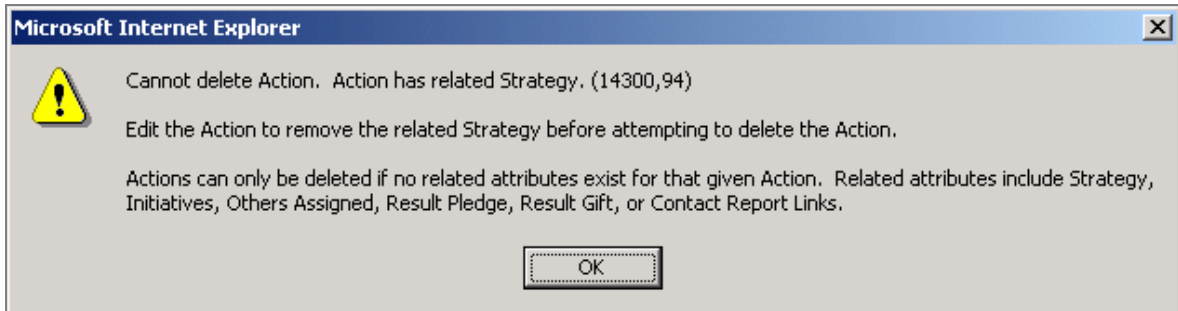
**Add an Action**

Click this button to access the Prospect Action page, where you can create a new action for the constituent. When you are finished, the system returns you to the action list.

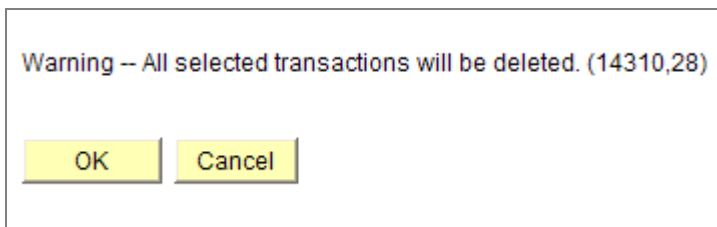
To delete a constituent action:

1. Click the **Select** check box next to the action to be removed.
2. Click the **Delete** button.

If the action has any related attributes, you receive an error message. The system dynamically creates the error message text to advise you of exactly what else must be removed from the action before the action itself can be removed. These error messages prevent orphan data from remaining in the system after the action has been removed.

**Example of delete error message**

If the action has no related attributes, you receive a warning message. Click **OK** to continue and completely remove the action from the system.

**Delete warning message**

3. If you must remove related attributes before deleting the action, click the **Action Description** link and edit the action as appropriate on the pages of the Constituent Action component.
4. Click **OK** to return to the Action List page.

## Filtering an Action List

Access the Action Filter page.

Action List
Action Filter

Johnson, Shaqua

**Constituent Type:** [Alumni](#)

**Action Type Code:**

**Action Status:**





**Responsible Person:**   Carroll, Bruce

**Solicitor:**

**ID:** AV0020

**Year:** 1977

**Institution:** PSUNV

**Item**

<b>Ask Amount From:</b>	<input type="text"/>	USD	<b>Ask Amount To:</b>	<input type="text"/>
<b>Commitment Amount From:</b>	<input type="text"/>		<b>Commitment Amount To:</b>	<input type="text"/>
<b>Planned Date From:</b>	<input type="text"/> <input type="button" value="Calendar"/>		<b>Planned Date To:</b>	<input type="text"/> <input type="button" value="Calendar"/>
<b>Complete Date From:</b>	<input type="text"/> <input type="button" value="Calendar"/>		<b>Complete Date To:</b>	<input type="text"/> <input type="button" value="Calendar"/>

### [Action Filter page](#)

Enter any combination of search criteria to narrow the list of actions to display for the constituent. Click the **Search** button to display the search results on the Action List page.