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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8 SP1 Contributor Relations Changes and Updates for SA Bundle #24

June 2008

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Changes and Updates for SA Bundle #24

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PeopleSoft Contributor Relations Changes and Updates for SA Bundle #24

Note. This document is an update to the *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*. It describes the Product Update ID #701889 that was posted to Customer Connection in June 2008. 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 #24. Specifically, it describes changes that allow you to manage select person records on the Giving Club Membership page yet preserve them when building giving clubs automatically.

See Also

PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook, "Processing Commitments and Analyzing Giving History"

Managing Giving Clubs

This section discusses changes to how you:

- Manually generate giving club membership.
- Automatically process giving club membership.

Pages Used to Manage Giving Clubs

| Page Name | Object Name | Navigation | Usage |
|------------------------|--|--|---|
| Giving Club Membership | AV_GCLUB_MBR AV_GCLUB_MBR_E AV_GCLUB_MBR_W | <ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Giving Club Membership • Manage Contributor Relations, Enter Commitments, Use, Giving Club Membership-Org • Manage Contributor Relations, Enter Commitments, Workset, Giving Club Membership | Manually assign a donor to a giving club. |

| Page Name | Object Name | Navigation | Usage |
|----------------------|------------------|--|---|
| Process Giving Clubs | AV_RUNCTL_GCLUBS | Manage Contributor Relations, Enter Commitments, Process, Process Giving Clubs | Run the AVPGCLUB process that generates giving club memberships and calculates membership levels based on donors' giving. |

Manually Generating Giving Club Membership

Access the Giving Club Membership page.

Giving Club Membership

Gallegher, Shawn ID: AV0001 📄 📅 🗨️

Constituent Type: [Alumni](#) Year: 2001 Institution: PSUNV

View All First 2 of 2 Last

Giving Club: 🔍 Test Club Ten + -

Fiscal Year: 🔍

Level: 🔍 Added By: Managed Manually

Membership Date: 📅 Last Update: 06/10/08 1:43PM

Giving Club Status: ▼

Amount: USD

Description:

Giving Club Membership page

Remember that to assign a donor to a giving club you must be the club's administrator. Other staff can view membership information on this page, but cannot update information.

Added By Delivered descriptions for the values for this field have been changed to either *Batch Process* or *Managed Manually* to indicate how the giving club membership was created.

Giving Club Status Select the current state of the donor's status in the giving club. Values for this field are now *Accruing*, *Member*, *Managed Member*, *Removed – Donor Request*, and *Removed – Manually*.

When you select a status of *Managed Member*, *Removed – Donor Request*, or *Removed – Manually*, the **Added By** field updates to *Managed Manually*.

Automatically Processing Giving Club Membership

Access the Process Giving Clubs page.

Process Giving Clubs

Run Control ID: GC08 [Report Manager](#) [Process Monitor](#) [Run](#)

Institution: PSUNV

Process Date: 06/10/2008

Commit Level: 100

Currency Code: USD

Include Managed Members

Process Giving Clubs

Unprocessed Sessions

Initialize Select Giving Clubs

Initialize All Giving Clubs

View All First 1 of 1 Last

| Giving Club Code | Giving Club Name |
|------------------|------------------|
| 1 | |

Process Giving Clubs page

Include Managed Members

This check box appears when you select either initialization option in the Process Giving Clubs group box on this page.

If you clear the check box (as defaulted), the Giving Clubs process leaves managed member records alone when rebuilding the club. Managed records are those created on the Giving Club Membership page with a status of *Managed Member*, *Removed – Donor Request*, or *Removed – Manually*.

If you select the check box, the process rebuilds the club and disregards any previously managed member records, recalculating giving club membership status based solely on giving history.

Note. If the Giving Clubs process is interrupted and does not complete (i.e., AVPGCLUB is unsuccessful), the rows within the temporary table (AV_AVPGCLUB_TMP) for that specific process instance need to be deleted. Use your site's native SQL tool to achieve this. Rerun the process. After the process runs, the AV_AVPGCLUB_TMP table should be empty for the related process instance, and all posted sessions should be processed.