

Oracle's PeopleSoft 8.9 Contributor Relations Changes and Updates for CS Bundle #15

June 2008

Changes and Updates for CS Bundle #15

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PeopleSoft Contributor Relations Changes and Updates for CS Bundle #15

Note. This document is an update to the *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*. It describes the Product Update ID #701895 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 CS Bundle #15. 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 Enterprise Contributor Relations 8.9 PeopleBook, "Processing Commitments"

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"> Contributor Relations, Session Management, Giving Clubs, Giving Club Membership Contributor Relations, Session Management, Giving Clubs, Giving Club Membership - Org Contributor Relations, Session Management, Giving Clubs, Giving Club Membership - Wkset 	Manually assign a donor to a giving club.
Process Giving Clubs	AV_RUNCTL_GCLUBS	Contributor Relations, Session Management, Giving Clubs, Process Giving Clubs	Run the appropriate process to generate giving club memberships and calculate membership levels based on donors' giving.

Manually Generating Giving Club Membership

Access the Giving Club Membership page.

Giving Club Membership

Shawn Gallegher

Constituent Type: [Alumni](#)

ID: AV0001

Year: 2001

Institution: PSUNV

Find | View All | First ◀ 1 of 1 ▶ Last

Giving Club: Annual Giving Club + -

Fiscal Year:

Level: **Added By:** Managed Manually

Membership Date: **Last Update Timestamp:** 06/10/08 1:04PM

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

Customize | Find | View All | First 1 of 1 Last

Giving Club Code	Giving Club Name		
1	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.