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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8.9 MP1 Contributor Relations Changes and Updates for CS Bundle #11

August 2007

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Changes and Updates for CS Bundle #11

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PeopleSoft Contributor Relations Changes and Updates for CS Bundle #11

Note. This document is an update to the *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*. It describes the Product Update ID #682701 that was posted to Customer Connection in August 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 CS Bundle #11. Specifically, it discusses changes related to how to:

- Enter a gift or pledge transaction.
- Generate designation donor list reports.
- View action details.
- Review electronic payment results.

See Also

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Entering Commitments," Entering Gifts and Pledge Payments

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Analyzing Giving History," Generating Designation Donor Reports

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Managing Prospects," Implementing a Prospect Plan

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Processing Commitments," Processing Credit Card Transactions

Entering a Gift or Pledge Transaction

When you enter a pledge payment on the Gift Entry page during gift entry, the system now displays all available tribute information associated with the pledge.

Generating Designation Donor List Reports

This section discusses changes to the Designation Donor List page.

Page Used to Generate Designation Donor List Reports

Page Name	Object Name	Navigation	Usage
Designation Donor List	AV_RUNCTL_DESDN	Contributor Relations, CR Reports, Giving Reports, Designation Donor List	Enter parameters and generate the Designation Donor List report. This report contains information about the posted commitments made to a particular designation.

Running a Designation Donor List Report

Access the Designation Donor List page.

Designation Donor List

Run Control ID: DONORS07 [Report Manager](#) [Process Monitor](#)

'Designation BU: Medical Business Unit

'Designation:

From: To:

From Gift Amount: To Gift Amount:

Constituents Find | View All First 1 of 1 Last

Credit Type Find | View All First 1 of 1 Last

Designation Donor List page

The **From Gift Amount** and **To Gift Amount** fields are added to this page.

Note. These fields relate to an individual gift range. Higher gift totals may appear on the generated report because the report calculates an individual's cumulative giving.

These new fields affect the report processing as follows:

- When the **From Gift Amount** is greater than zero AND the **To Gift Amount** is equal to zero, the selection criteria will treat the **From Gift Amount** as the lower threshold with no limit on the **To Gift Amount**.

For example, if the **From Gift Amount** is equal to \$1,000.00 and the **To Gift Amount** is equal to \$0.00, then the selection criteria will be all gift amounts greater than or equal to \$1,000.00.

- When the **To Gift Amount** is greater than zero AND the **From Gift Amount** is equal to zero, the selection criteria will treat the **To Gift Amount** as the upper threshold with no limit on the **From Gift Amount**.

For example, if the **To Gift Amount** is equal to \$21,000.00 and the **From Gift Amount** is equal to \$0.00, then the selection criteria will be all gift amounts less than or equal to \$21,000.00.

- When the **From Gift Amount** is greater than zero AND the **To Gift Amount** is greater than zero, the selection criteria will treat the **From Gift Amount** as the lower threshold and the **To Gift Amount** as the upper threshold.

For example, if the **From Gift Amount** is equal to \$1,000.00 and the **To Gift Amount** is equal to \$21,000.00, then the selection criteria will be all gift amounts greater than or equal to \$1,000.00 and less than or equal to \$21,000.00.

- When the **From Gift Amount** is equal to zero AND the **To Gift Amount** is equal to zero, the SQR process will not consider either the **From Gift Amount** or the **To Gift Amount** as part of the selection criteria.

For example, if the **From Gift Amount** is equal to \$0.00 and the **To Gift Amount** is equal to \$0.00, then no additional selection criteria will be generated and all donors to the selected Designation will be included in the report.

Viewing Action Details

This section discusses how to review details of an initiative or prospect action on a single page in the system.

Page Used to View Action Details

Page Name	Object Name	Navigation	Usage
Action Detail	AV_ACTN_DTL_SP	<ul style="list-style-type: none"> • You can access the Action Detail page through multiple navigation paths. This one is used frequently: • Click a Detail link for a person on the Action Summary page. 	View additional information about an action.

Viewing Action Details for a Person

Access the Action Detail page.

Action Detail

Shaqua Johnson

ID: AV0020

[Edit Action](#)

Action Information

Action:	Invite to Dean's Symposium		
Action Number:	63	Action Status:	Scheduled
Action Type:	Invitation	Contact Type:	Letter
Planned Date:	11/20/1998	Complete Date:	
Strategy:	Johnson Business Endowment		
Responsible Person:	10001	Prospect Manager:	Franken,Alan

Others Assigned

[Customize](#) | [Find](#) | First 1-2 of 2 Last

Type	Resource Assigned	Name	Role
Unit	ANNLGVG	Annual Giving	Solicitor
Volunteer	AV0010	Kuney,Dara	Committee Member

Initiatives

[Customize](#) | [Find](#) | First 1 of 1 Last

Initiative Type	Initiative Code	Description
CAMPAIGN	BUSINESS	College of Business Campaign

Ask Information

Action Description

Involve in symposium leadership

Contact Report

[Return](#)

Action Detail page

This page displays all fields related to an action. All group boxes are collapsible and expandable. If a group box is collapsed upon entering the page, it has no data. You can print this page using your browser's print functionality.

The fields on this page are the same as those on the pages of the Prospect Action component. Click the **Edit Action** button to access the Prospect Action pages and update any part of the action. When finished, click the **OK** button to return to the summary page that launched the Action Detail page to select **Details**, which the system displays with the updated action data.

Reviewing Electronic Payment Results

This section discusses how to:

- Prepare to run the Electronic Payment (EP) processing audit.
- Generate the EP Processing Audit report.
- View EP processing audit information online.

Pages Used to Review Electronic Payment Results

Page Name	Object Name	Navigation	Usage
EP Run Review	AV_EP_RUN_DETAIL	Contributor Relations, Session Management, Process Electronic Payments, EP Run Review	Enter run parameters and generate the EP Processing Audit report (AV704).
EP Run Review – Transaction List	AV_EP_TRAN_RUN_LOG	Click the Process Instance link on the EP Run Review page.	View process instance and reference number details for a transaction.

Preparing to Run the EP Processing Audit

Before you can generate the AV704 report, you must:

1. Enter credit card gifts or membership payments on the Gift Entry or Membership Entry pages.
2. Balance, queue, and post those gift or membership sessions.
3. Submit a request to process the credit card transactions using the EP Transaction Processing page.

Generating the EP Processing Audit Report

Access the EP Run Review page.

EP Run Review

Run Control ID: AV704

[Report Manager](#) [Process Monitor](#)

EP Processing Audit							
Process Instance:	<input type="text" value="792"/>			*Academic Institution:	<input type="text" value="PSUNV"/>		
Transaction Requested:	Settle						
Run Date/Time:	08/14/07 3:26:54PM						
Filter Options							
Institution:	PSUNV	Filter by Operator ID:	<input type="text" value="PS"/>				
Process Details							
				Customize Find View All	First	1-2 of 2	Last
Select	Process Instance	Session Type	Run Date/Time	Process Run Status	Transaction Requested	Request Status	
<input type="checkbox"/>	792	Gift	08/14/2007 3:26:54PM	Success	Settle	Success	
<input type="checkbox"/>	791	Gift	08/14/2007 3:22:24PM	Success	Authorize	Exception	

[EP Run Review page](#)

EP Processing Audit

You can enter a **Process Instance** number to use for this report, or click the button in process instance row to copy that instance's information into the fields of the group box.

Filter Options

The **Filter by Operator ID** field is available if you have gift or membership supervisor security status in the system.

Process Details

Process Instance

Click a numbered link to access the EP Run Review – Transaction List page, where you can review more details about the transactions processed in this instance.

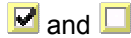
Request Status

Values for this field are *Success* and *Exception*. An exception status means that at least one transaction in the instance did not return with the status you requested.

For example, in the page shown above, at least one transaction in Process Instance 803 did not reach Authorized status.

Delete

After selecting one or more process instances, click this button to remove them from the list of transactions used to generate the report.



Click the button to select all process instances in the grid. Click the button to deselect checked instances.

When you run the process, the system generates the AV704 report. Each EP Transaction Requested status begins a new page, and the last page provides total transaction amounts. See the end of this document for an example of a generated AV704 report.

Viewing EP Processing Audit Information Online

Access the EP Run Review – Transaction List page. This page provides an online view of the same information contained in the AV704 report.

EP Run Review Transaction List

Institution: PSUNV PeopleSoft University
Process Instance: 792 **Run Date/Time:** 08/14/07 3:26:54PM
User ID: PS **Transaction Requested:** Settle

▼ Process Instance List Customize | Find | View All | First 1-2 of 2 Last

List Detail

Reference Number	Sequence number	Payment Status	Credit Card Message 1
0000000000000002	2	Settled	ICS:1 SOK
0000000000000004	2	Settled	ICS:1 SOK

[Return to EP Run Review](#)

EP Run Review – Transaction List page: List tab

The List tab provides information about how the electronic transaction was handled during processing. Click the **Reference Number** link to access the Reference Number List view of the page, which displays a history of the reference number and previous attempts to work with the transaction.

EP Run Review Transaction List

Institution: PSUNV PeopleSoft University
Process Instance: 792 **Run Date/Time:** 08/14/07 3:26:54PM
User ID: PS **Transaction Requested:** Settle

▼ Process Instance List Customize | Find | View All | First 1-2 of 2 Last

List Detail

Business Unit	Tender	Session Number	Gift Number	Transaction Date	Authorization Date	ID	Org ID	Gift Amount	Authorization Reply
MEDBU	CC	159	316	08/14/2007	08/14/2007	AV0001		100.00	Approve
MEDBU	CC	159	318	08/14/2007	08/14/2007	AV0020		300.00	Approve

[Return to EP Run Review](#)

EP Run Review – Transaction List page: Detail tab

The Detail tab provides information about the transaction itself and displays details about what was entered.

EP Run Review
Transaction List

Institution: PSUNV PeopleSoft University

▶ **Process Instance List**

[Return to Process Instance List](#) ▶

Reference Number List			
Reference Number	Sequence number	Payment Status	Credit Card Message 1
0000000000000002	1	Authorized	ICS:1 SOK
0000000000000002	2	Settled	ICS:1 SOK

[Return to Process Instance List](#) ▶

[Return to EP Run Review](#)

EP Run Review – Transaction List page: Reference Number List view

Click the **Payment Status** link to access the AV_EP_TRANS_SP page, where you can view system action details that relate to this transaction.

For details about the AV_EP_TRANS_SP page, see *Oracle’s PeopleSoft 9.0 Bundle #3, Changes and Updates to PeopleSoft Contributor Relations*, “Reviewing Credit Card Activity,” posted on Customer Connection in June 2007.

Example of Electronic Payment Processing Audit report, AV704

Report ID: AV704 Page 1 of 3
 EP Process Instance: 803 Report Date: 08/09/2007
 EP Process Date Time: 08/09/2007 9:38 AM Report Time: 9:48 AM
 EP Transaction Requested: Authorize
 User ID: PS

Electronic Payment Processing Audit

Business Unit	Session Number	Gift Payment Number	ID Type	Constituent Name / ID	Amount	Payment Status	Return Status	Request ID
MEDBU	166	333 Approve	Person	AV0007 Whitney, Christopher	100.00 USD	Authorized 123456	0	1866775158170176846499
MEDBU	166	335 Approve	Person	AV0009 Crosbie, Edward	300.00 USD	Authorized 123456	0	1866775209730176846499

Authorized Totals **Count: 2** **Amount: 400.00 USD**

Report ID: AV704

Page 2 of 3
 Report Date: 08/09/2007
 Report Time: 9:48 AM

Electronic Payment Processing Audit

EP Process Instance: 803
 EP Process Date Time: 08/09/2007 9:38 AM
 EP Transaction Requested: Authorize
 User ID: PS

Business Unit	Session Number	Gift Payment Number	ID Type	Constituent Name	Constituent ID / Name	Amount	Payment Status	Return Status	Request ID
MEDBU	166	334	Person	Carroll,James	AV0008	200.00 USD	Declined	101	
Reply: Decline ICS:0 DENVALIDDATA The following request field(s) is either invalid or missing: bill_zip									
Declined Totals						Count: 1	Amount:	200.00 USD	

Report ID: AV704

Page 3 of 3
08/09/2007
9:48 AM

Electronic Payment Processing Audit

Report Date:
Report Time:

EP Process Instance: 803
EP Process Date Time: 08/09/2007 9:38 AM
EP Transaction Requested: Authorize
User ID: PS

Grand Totals

Authorized	2	400.00 USD
Declined	1	200.00 USD
	3	600.00 USD