

Guide to Advance Help

Ver. 1.1

3/15/2019

1. Log in to Advance.
2. There are two ways to access the Advance Help.
 - 1) From the **Help** icon at the top of the screen. This opens the general help.

The screenshot shows the ADVANCE application interface. At the top, there is a navigation bar with the word "ADVANCE" on the left and user information "Chris Farris [Logoff]" on the right. In the center of the top bar, there is a blue question mark icon representing the Help function, which is highlighted with a green box. Below the top bar, there are browser tabs for "Home" and "Lookups - Bio - Entity". The main content area is titled "Lookups" and contains a form with several dropdown menus and a search button. The form is divided into sections: "Lookups" (with instructions 1-5), "ID Lookup (70037)", and "Entity Lookup (70036)". The "Entity Lookup" section includes a "Sounds Like" checkbox and various search criteria like "Last/Org Name", "First", "Middle", "Name Type", "Record Status", "Primary Record Type", "School", and "Class". Two horizontal blue bars are present: one above the "ID Lookup" section and one above the "Entity Lookup" section. Each of these blue bars has a "Help" button on its right side, both of which are highlighted with green boxes. Green arrows point from the top Help icon to these two "Help" buttons.

- 2) From the **Help** in the horizontal blue bars. This opens the help page specific to the page.

NOTE!! If you want to go directly to the **Help** for the page/area that you are in, always use the **Help** in the **BLUE** Bar.

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The screenshot displays the Advance Help Suite interface. At the top, a navigation bar includes icons for Contents, Index, Search, Site Help, Glossary, and Print. A sidebar on the left, titled 'Table of Contents', lists various help topics with expandable arrows. The 'University of Arkansas' item is highlighted with a green box and a letter 'E'. Other items include Getting Started, Lookups, Biographic, DataLoader, Document Management, Gift/Pledge (marked with 'D'), Events, Membership, Prospect Management, Reporting, Ticketing, and Accessibility. The main content area on the right is titled 'Welcome to Advance' and contains a welcome message, a list of actions users can perform in the help suite, and a list of help topics with brief descriptions. The topics listed are: New Users: Learning the Basics, Looking Up and Finding Data, Biographic Maintenance, Gift, Pledge and Matching Gift Entry, Membership and Dues Payment Entry, Events, Prospect Management, Tailoring Advance, and System Option Settings.

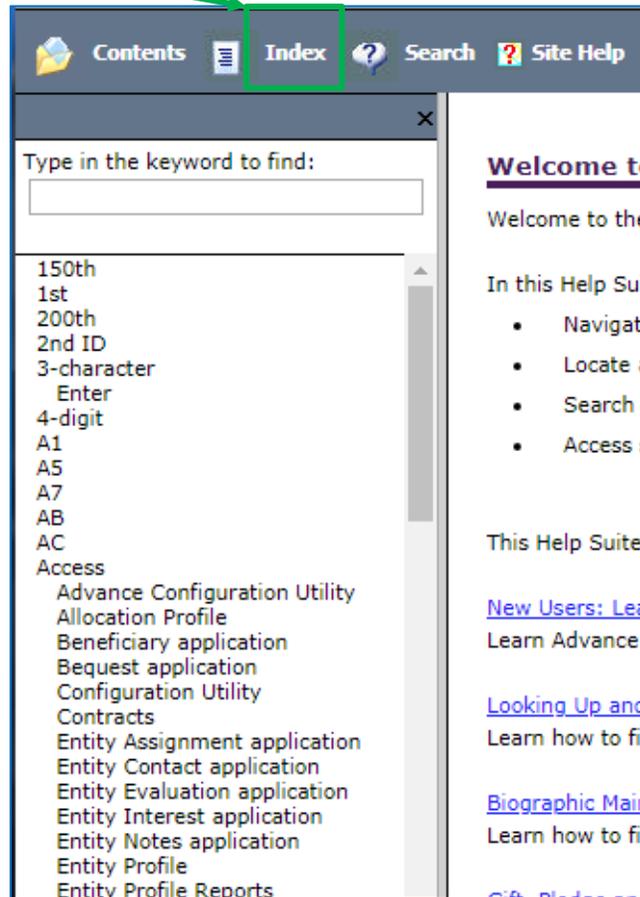
SEE NEXT PAGE FOR BREAKDOWN OF THE HELP SCREEN.

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- A. **Contents** - The Contents brings up the screen as you see it above.
- B. **Index** - Index brings up a list of terms that can be found in the Help system. Use the keyword search at the top to narrow the results.

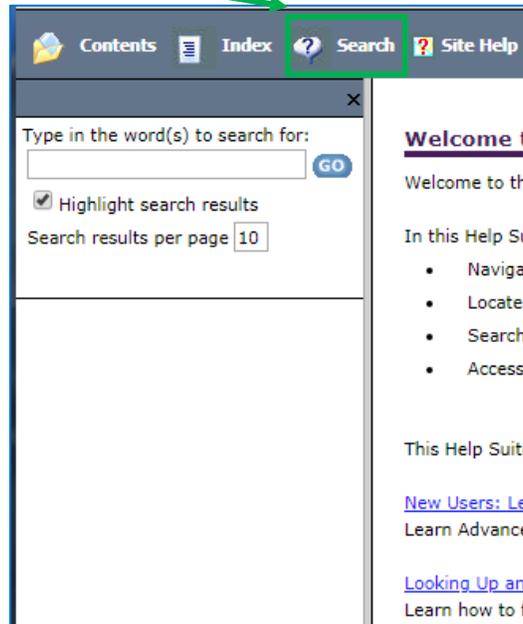


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- C. **Search** - Search allows you to search for a topic by whatever text you enter into the form.



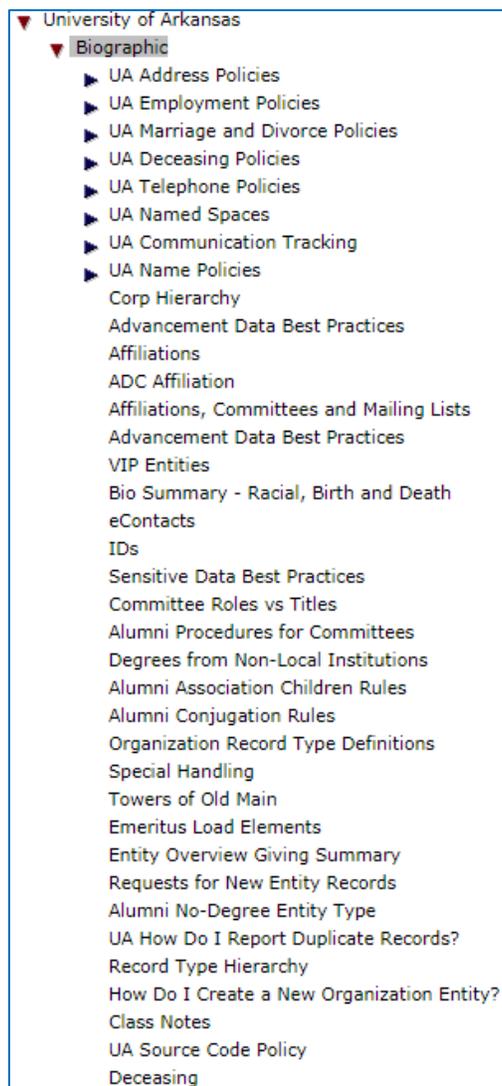
- D. **Ellucian Help Topics** - The Ellucian help topics have been written from a technical perspective and will assist the user in navigating the system. This is a very helpful tool that is designed from a generic perspective.

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- E. **University of Arkansas** - The **University of Arkansas** section is written and maintained by U of A staff members. This is primarily a **POLICY** and **PROCEDURE** section. See below.
- a. **Biographic** - This area is managed by the Records team at records@uark.edu. Topics below:

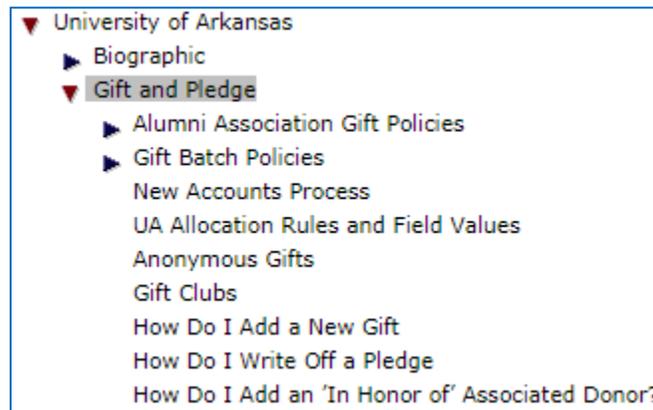


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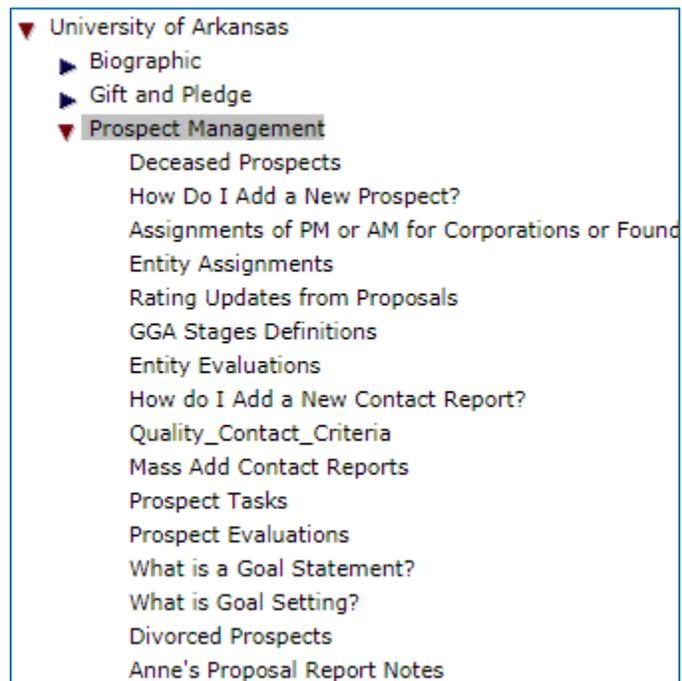
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- b. **Gift and Pledge** - This area is maintained by the Gift Services team.
giftserv@uark.edu.



- c. **Prospect Management** - This area is maintained by Jason Selle.
selle@uark.edu.



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d. **Membership** - This area is maintained by the Alumni Association.

- ▼ University of Arkansas
 - ▶ Biographic
 - ▶ Gift and Pledge
 - ▶ Prospect Management
 - ▼ **Membership**
 - Divorced Entities with Joint Memberships
 - Deceased Entity with a Joint Membership
 - Membership Processing Reports
 - How Do I Add a New Membership?
 - How Do I Add a Membership or Dues Payment?
 - How Do I Find an Open Batch of Memberships?
 - How Do I Print the Batch Proof Report
 - How to Prorate a Membership
 - How Do I Reverse a Membership or Dues Payment that has been Processed?
 - How Do I Modify a Membership or Dues Payment that has Been Processed?
 - How Do I Renew an Existing Membership?
 - How do I close a Membership Batch
 - How Do I Create New Batch of Memberships?
 - How Do I Change a Membership Payment Plan?
 - Membership Types
 - How to Prorate a Membership

e. **Feedback and Other Miscellaneous** - This area is maintained by committee.

- ▼ University of Arkansas
 - ▶ Biographic
 - ▶ Gift and Pledge
 - ▶ Prospect Management
 - ▶ Membership
 - ▼ **Feedback and Other Miscellaneous**
 - UA Feedback Information
 - UA Alerts
 - Lookup Quick Tips
 - Research Profile Note Codes