

Guide to the Home Screen and the Main Menu

Ver. 1.1

2/12/2019

ADVANCE
Chris Farris [Logout]

Home x

Home

- ▶ Annual Fund
- ▶ Gift & Bio
- Alerts/Messages
- Change Password

Home Actions

You are logged on as **Mr. Christopher Farris** on the **ADVPROD** database. Welcome to Advance. Today is Tuesday, February 12, 2019.

Tasks Actions Help

Undergraduate Giving Statistics Actions Help

Last Fiscal Year		This Fiscal Year	
Undergraduate Donors	12,434	Undergraduate Donors	10,774
Total Undergraduates	109,087	Total Undergraduates	113,640
% of Undergraduate Giving	11.4%	% of Undergraduate Giving	9.48%
Young Alumni Donors	1,983	Young Alumni Donors	1,740
Total Young Alumni	32,268	Total Young Alumni	37,697
% of Young Alumni Giving	6.15%	% of Young Alumni Giving	4.62%

UA Giving Summary Actions Help

Fiscal Year	Gift/Payments Received	Pledges/Bequests Outstanding	Total Commitment
2019	\$973,618.42	\$144,344.48	\$1,117,962.90
By Unit	\$106,511,572.88	\$31,573,175.89	\$138,084,748.77
Total	\$107,485,191.30	\$31,717,520.37	\$139,202,711.67

UA Entity Type Statistics Actions Help

	Total	Deceased	Living	Lost	Addressable
Alumni	181,263	24,355	156,908	11,916	144,992
Non-Degreed	31,298	2,052	29,246	653	28,593
Parent	26,446	31	26,415	17	26,398
Faculty	1,037	0	1,037	14	1,023
Staff	2,206	0	2,206	223	1,983
Student	17,403	2	17,401	12,014	5,387
Former Faculty	1,346	155	1,191	33	1,158
Former Staff	4,105	180	3,925	172	3,753
Former Parent	93,257	1,878	91,379	1,455	89,924
Friend	144,222	11,500	132,722	10,656	122,066
Former Student	7,614	23	7,591	4,271	3,320

Past 10 Days Deceased Entities Report (67) Actions Help

ID Number	Deceased Name	Confirmed	Deceased	Assignment Mgr
0000049802	Mrs. Cynthia L. Toth	02/08/2019	11/10/2013	
0000721713	Mr. Gary Brassfield	02/08/2019	11/15/2018	
0000035147	Mr. Larry A. Hunter	02/08/2019	02/03/2019	

Last Viewed Actions Help

Entity	Prospect	Contact Report
Ms. [Redacted] (4189)	Do [Redacted]	[Redacted]
Mr. [Redacted] (1931)	Ca [Redacted]	[Redacted]
Mrs. [Redacted] (Martinelli (#...))	To [Redacted]	[Redacted]
His [Redacted] (Martinelli ...)	Se [Redacted]	[Redacted]
Mrs. [Redacted] (59)	Ke [Redacted]	[Redacted]

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1. The Home Screen

- This is the primary screen that the user sees when logging in to Advance.
- NOT all users have the same view. Depending upon the user's role, parts of this screen will have different information.
- All users have the same basic screen zones.

2. The BASIC Screen Zones

The screenshot shows the ADVANCE Home Screen. At the top left is the 'ADVANCE' logo. To the right of the logo is a navigation bar with a home icon (circled in green), a hand icon, a binoculars icon, an eye icon, a globe icon, a clipboard icon, a question mark icon, and a close icon. Further right is the user name 'Chris Farris [Logoff]' and three circular navigation icons. Below the navigation bar is a 'Home' tab with a close button. On the left is a 'Home' sidebar with a navigation tree containing 'Annual Fund', 'Gift & Bio', 'Alerts/Messages', and 'Change Password'. A green circle labeled 'B' is around the 'Gift & Bio' item. The main content area has a 'Home' header with an 'Actions' link. Below it is a welcome message: 'You are logged on as Mr. Christopher Farris on the ADVPROD database. Welcome to Advance. Today is Tuesday, February 12, 2019.' This is followed by a 'Tasks' section with 'Actions' and 'Help' links. The 'Undergraduate Giving Statistics' section has 'Actions' and 'Help' links and contains two tables. The first table compares 'Last Fiscal Year' and 'This Fiscal Year' for Undergraduate Donors, Total Undergraduates, and % of Undergraduate Giving. The second table compares 'Last Fiscal Year' and 'This Fiscal Year' for Young Alumni Donors, Total Young Alumni, and % of Young Alumni Giving. A green circle labeled 'A' is around the 'Total Young Alumni' row in the second table. Below this is a 'UA Giving Summary' section with 'Actions' and 'Help' links, containing a table with columns for Fiscal Year (2019), Gift/Payments Received, Pledges/Bequests Outstanding, and Total Commitment. The final section is 'UA Entity Type Statistics' with 'Actions' and 'Help' links, containing a table with columns for Total, Deceased, Living, Lost, and Addressable.

Last Fiscal Year		This Fiscal Year	
Undergraduate Donors	12,434	Undergraduate Donors	10,774
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Fiscal Year	Gift/Payments Received	Pledges/Bequests Outstanding	Total Commitment
2019			
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By Unit	\$106,511,572.88	\$31,573,175.89	\$138,084,748.77
Total	\$107,485,191.30	\$31,717,520.37	\$139,202,711.67

Total	Deceased	Living	Lost	Addressable

A. The Information Panel

- This is the area that displays the information that you are looking for as you move through the system.
- The information displayed is controlled by the **Navigation Tree** commands.
- If the user has the ability to change information in **Advance**, they will do so from the Information Panel.

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B. The Navigation Tree (Nav Tree)

- a. The **Nav Tree** contains the commands that control the information displayed on the Information Panel.
- b. The **Nav Tree** commands change as you launch different tools in **Advance**.
- c. Tools (or **Applications**) are launched from the **Main Menu**.

C. The Main Menu

- a. The **Main Menu** is used to launch tools in **Advance**.
- b. Each tool launched will have its own (and specific) **Nav Tree** with commands to provide the user the information that they seek.

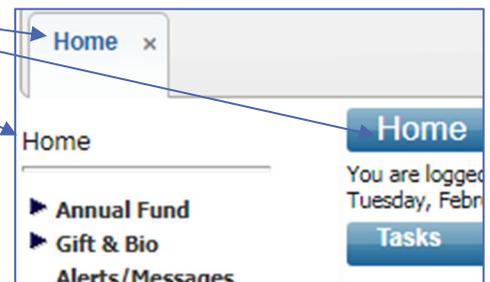
3.



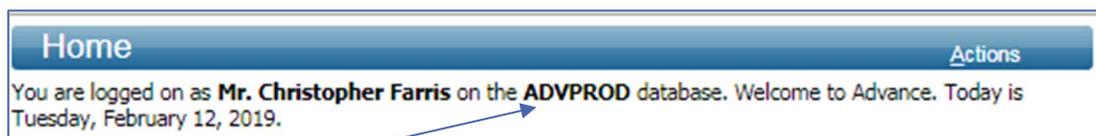
NOTE: SOME THINGS YOU NEED TO KNOW!

How do you know that you are on the Home screen?

The system tells you 3 times.



There are two versions of Advance (Production: Where we do the real work, and Train: Where we test things or practice things without harming the system.) **How do you determine whether you are in Production or Train?**



Production says ADVPROD. Train will say ADVTRAIN.

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3. The Main Menu (Detail)



-  - The **Home** icon takes you to your **Home Screen**.
-  - The **Go to** icon allows you to launch tools in **Advance**. (Not everyone needs these tools. If your job calls for it, you will know.)
 - It will launch a menu like this:

Go To ✕

Application

Open with ID

Go

Application	ID	Mnemonic	Type
Ack Candidate List	160	ACKCL	
Ack Helper	162	ACKHU	Entity
Activities	2100	ACT	Entity
Add Organization	1201	ORGNEW	
Add Person	1200	ENTNEW	
Addresses	2101	ADDR	Entity
Admissions Volunteer Activities	2102	ADVOL	Entity
Affiliations	2103	AFFIL	Entity
Alerts	152	ALERT	Entity
Alerts and Messages	150	ALMSG	Entity
Allocation	80352	ALLOC	Allocation
Allocation (New)	80815	ALLOCNEW	
Allocation Alerts	152	ALLOCALT	Allocation
Allocation Assignments	80353	ALLOCA	Allocation
Allocation Beneficiaries	80354	ALLOCB	Allocation
Allocation Financials	80355	ALLOCF	Allocation
Allocation Notes	80356	ALLOCN	Allocation
Allocation Stewardees	80357	ALLOCS	Allocation
Allocation Tasks	80358	ALLOCT	Allocation
Appeals	330	APPEAL	Entity

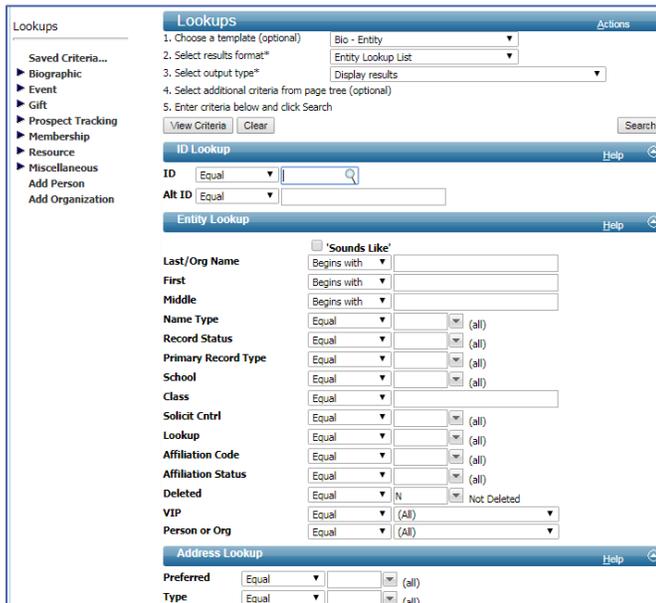
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- Some of the tools that you may launch?
 - **GVIEWS** - Giving Views shows you a detailed transaction by transaction list of gifts by an Entity
 - **CRPT** - Contact Report (New) allows you to create a new Contact Report
 - **CRPTS** - Contact Reports shows you existing Contact Reports
 - **EVTNEW** - Event New allows you to create a new event in Advance so that you may track Invitations, RSVPs and Participation
 - **ALLOCNEW** - Allocation (New) allows you to create a new allocation
 - **CMTENEW** - Committee Header (New) allows you to create a new committee in Advance
 - **CHN** - Communication Header (New) allows you to create a new communication header
 - There are many, many other tools available.

-  - Lookups launches the Lookups tool (See the How Tos on Lookups)



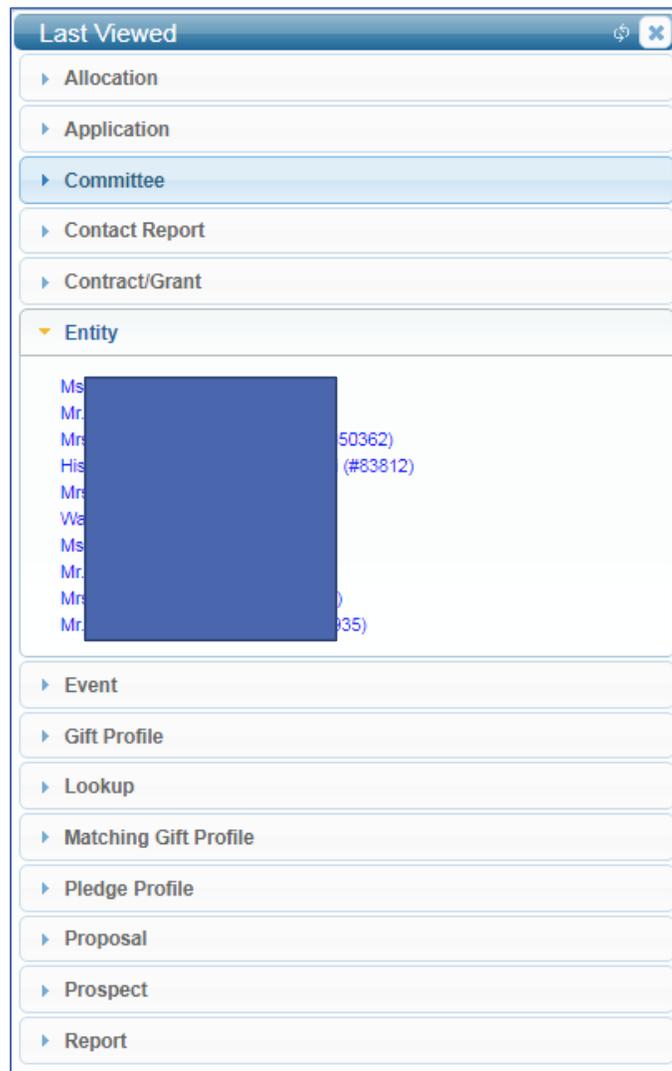
The screenshot shows the 'Lookups' tool interface. On the left is a sidebar with a tree view of categories: Saved Criteria..., Biographic, Event, Gift, Prospect Tracking, Membership, Resource, Miscellaneous, Add Person, and Add Organization. The main content area has a 'Lookups' header with instructions: 1. Choose a template (optional) [Bio - Entity], 2. Select results format* [Entity Lookup List], 3. Select output type* [Display results], 4. Select additional criteria from page tree (optional), 5. Enter criteria below and click Search. There are 'View Criteria' and 'Clear' buttons. Below the instructions are three sections: 'ID Lookup' with 'ID' and 'Alt ID' dropdowns and input fields; 'Entity Lookup' with a 'Sounds Like' checkbox and various dropdown filters for fields like Last/Org Name, First, Middle, Name Type, Record Status, Primary Record Type, School, Class, Solicit Cntrl, Lookup, Affiliation Code, Affiliation Status, Deleted, VIP, and Person or Org; and 'Address Lookup' with 'Preferred' and 'Type' dropdowns.

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-  - The **Last Viewed** tool allows you to pull up any pages that you have viewed previously, including pages viewed on other systems.
 - Remember everything done in the Advance system is done on the server, not your local machine.
 - The server keeps track of your activity for you.
 - Here is an example of what your **Last Viewed** tool might look like:



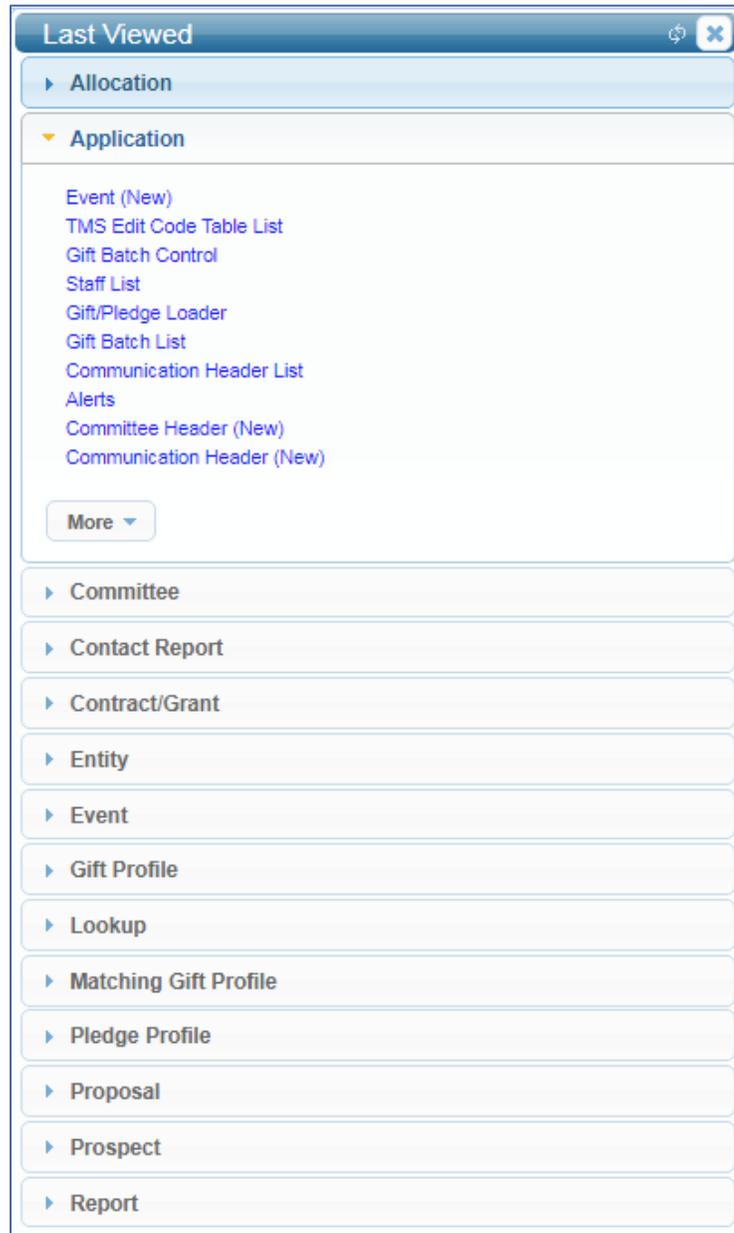
- By default the system opens the **Entity** portion of the **Last Viewed**.
- By clicking on any of the other options you may view those areas as well.

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- Here is an example of where I have been under **Application** (launched from the **Go to**.)



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-  - **Reports** takes you to a screen with specific reporting tools that are most often used for specific functions. Though it is called **Reports** do **NOT** consider this a reporting page.
 - Unless your department has a specific purpose for a report on this page, best to leave it alone.
 - User reports are found in **Crystal Reports**, NOT here.
 - Here is what it looks like:



Report List Actions Print

This is the list of general reports that you can run. Select a report by clicking on the icon in the leftmost column in the report list below.

Keyword(s)

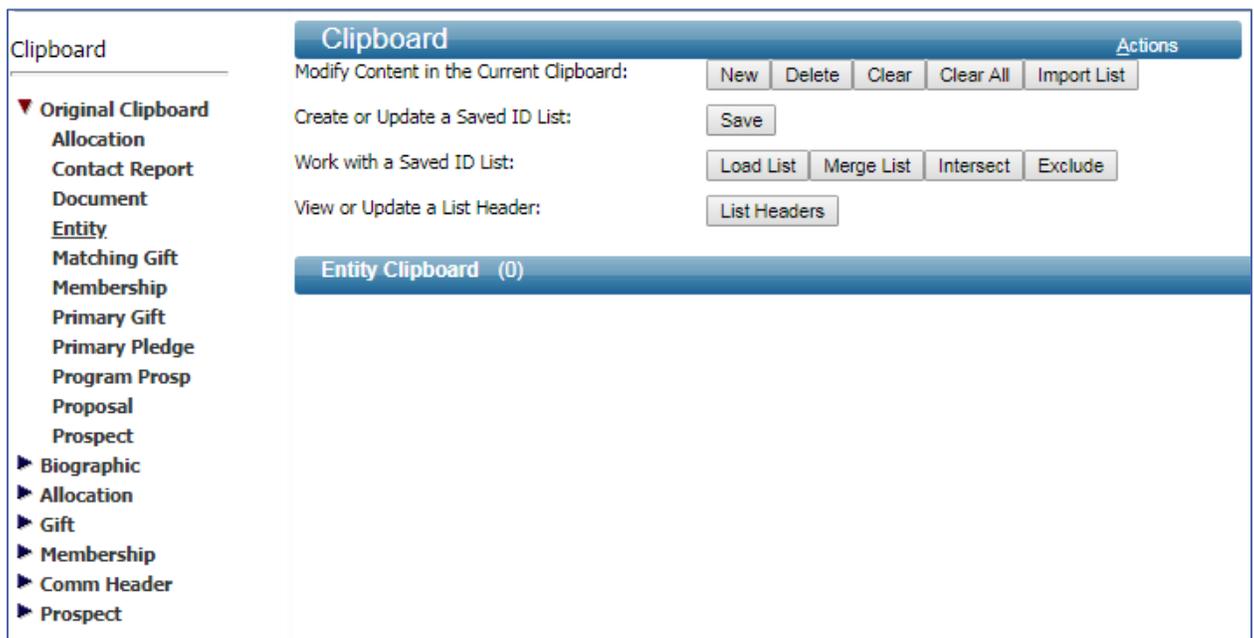
Reports		Actions Help	
	Context	Name	Description
...		AAA Ack Oops	Fixes acknowledgements when a...
...		AAA Hog Tag IDs Matched to Advance Entities	AAA Hog Tag IDs Matched to Ad...
...		AAA HogTag ID Updates Needed	AAA HogTag ID Updateds Neede...
...		AAA Memb Appeal Oops	Removes appeal codes that were...
...		Advance Sessions	List of all sessions from Advance ...
...		Affiliation Report - Crystal Report	Sample Report showing the entit...
...		Affiliation Report - Web Form	Sample Report showing the entit...
...		Batch Proof Report Rerun	Rerun of Memb Batch Proof Rep...
...		CAE (formerly CF AE) - Report	This Report summarizes the sour...
...		Closed Batch Separator Sheets	Closed Batch Separator Sheets
...		Closed Memb Batch Separator Sheets	Closed Memb Batch Separator S...
...		Contact Activity Report - Group By Office	Data on contact activity among s...
...		Contact Activity Report - Group By Staff	Data on contact activity among s...
...		Contact Activity Report - Group By Unit	Data on contact activity among s...
...		Create Year End Tax Receipts	Create Year End Tax Receipts
...		Document Batch Loader Report	List of all batch-loaded documen...
...		Donor Report - Crystal Report	Sample report showing alumni w...
...		Donor Report - Web Form	Sample report showing alumni w...
...		Event Calendar	Summary of scheduled events fo...
...		Event Tree with Ticket count	Event Tree with Ticket count
...		Gift Aid Report	Gift Aid Report for Inland Revenue
...	Entity	Google Entities	Map selected entities with Googl...
...		IFAS Allocation Update Report	IFAS Allocation Update Report
...		IFAS Interface Error Report	IFAS Interface Error Report
...		Membership Card Export - Date Range	Membership Card Export - Date ...
...		Membership Card Export - Entity ID List	Membership Card Export - Entity...
...		Membership Renewals	Membership Renewals Report
...		Membership Totals	Membership Totals
...		Online Giving Report	Online Giving Report
...		Packing List	Packing List
...		Participant by Fee	List of Participants by Fee
...		Participation Detail	List of Event Participants by Clas...

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-  - The **Clipboard** is used for making changes to multiple entities at one time.
 - The most common use of the **Clipboard** is for creating an **Event**. With the **Clipboard** the user can record that 300 people were invited to the **Event** and show it on each of their records without manually looking up and changing each individual.
 - Another common use is to create report in **Crystal Reports** that pulls data on multiple users.
 - The **Clipboard** requires special access and special training.
 - Here is what it looks like:



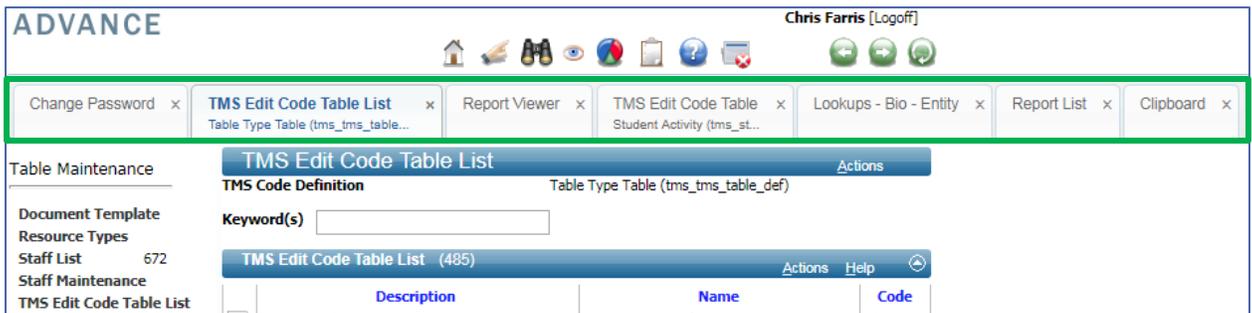
-  - Help will open a new tab on your browser with all of the Help topics for Advance.
 - The bottom-most entry in the Help screen will be U of A specific topics, including policy and procedure.

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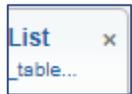
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-  - **Close All.**
 - You may notice as you move through the system that it opens multiple tabs, like so:



- Once you reach 9 tabs, **Advance** will tell you that you must close some of them.
- You may do this individually by clicking the x in the top right corner of each



tab or you can click **Close All** and close all of the tabs at one time.

-  - The direction buttons can be **unreliable**. If you need this functionality it is better to use the **Back**, **Forward** and **Refresh** buttons on the browser itself.

4.  - Use the Logoff command to get yourself out of Advance.
 - a. **IMPORTANT** - Advance information is confidential. Do not leave open sessions of Advance so that others may view the information inside.