Ver. 1.3

12 December 2018

Development Officer Handbook

Table of Contents:

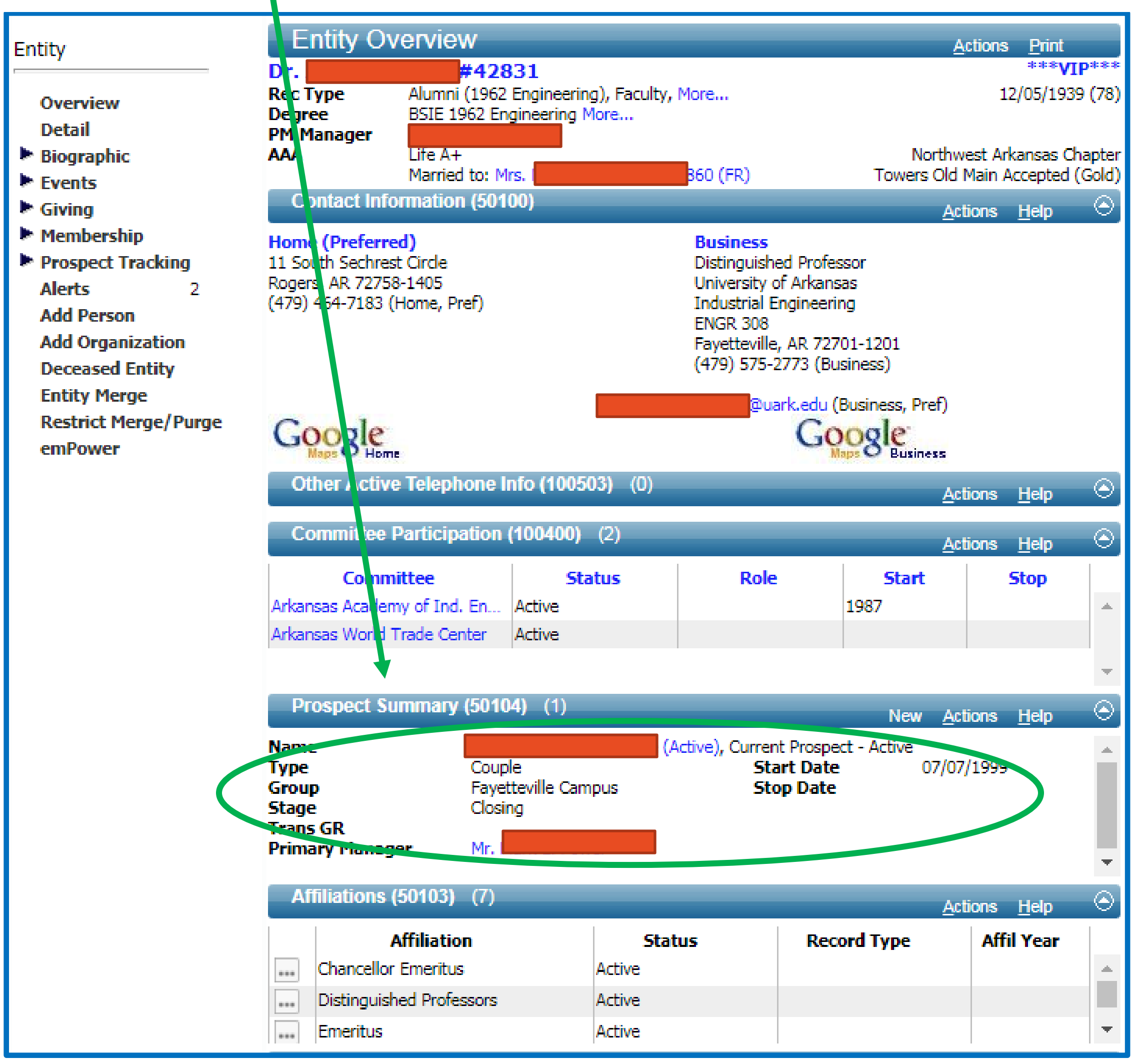
Table of Contents

Contact Reports

How to Create and View Contact Reports

All Contact Reports should be entered from the Entity Overview Screen. Entering Contacts from the Prospect view will lead to INACCURATE reporting data.

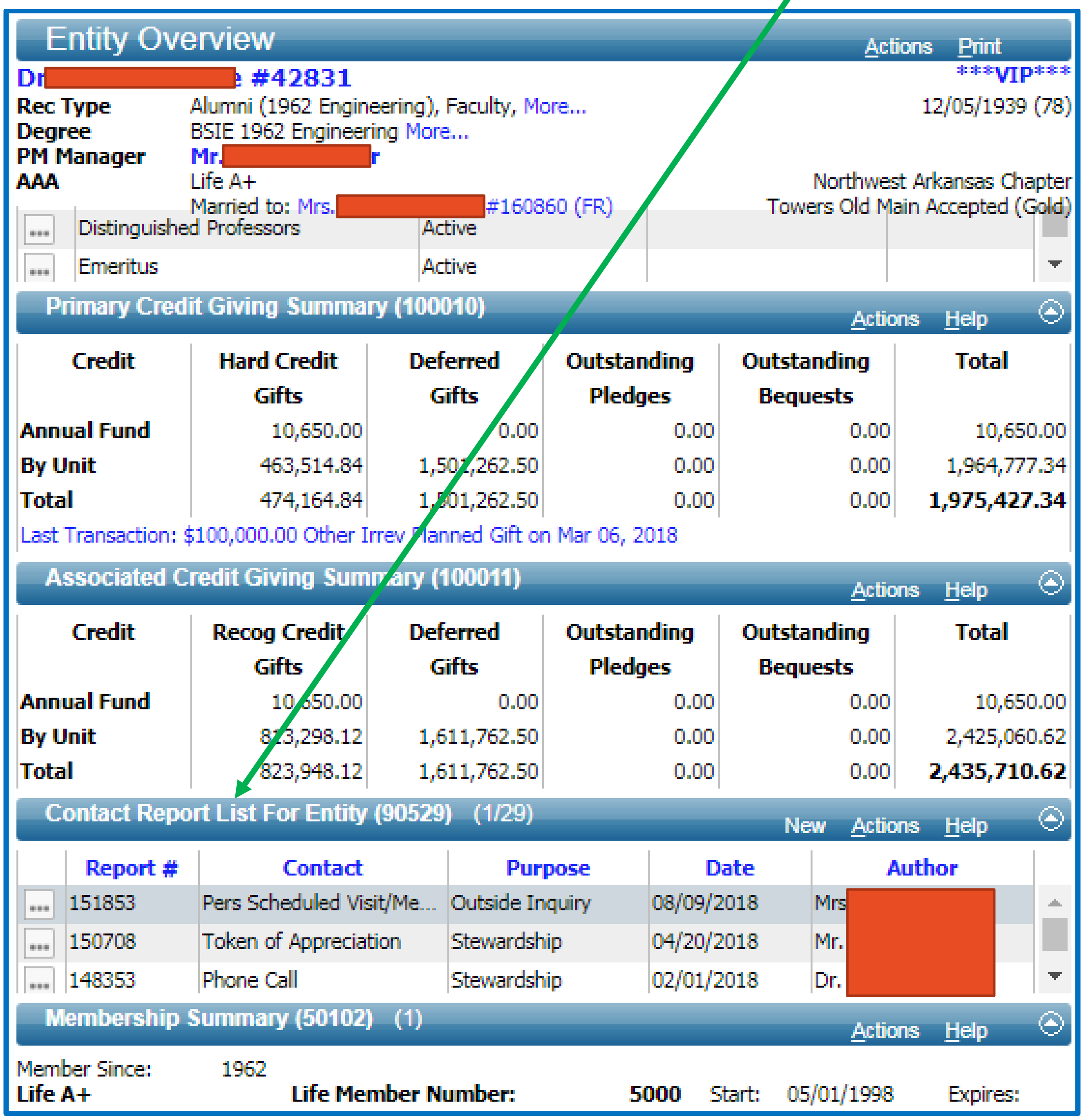
1. Search for the Entity that needs a Contact Report added.
2. From the **Entity Overview** Screen.
3. Look for the **Prospect Summary** bar.



4. Confirm that there is Prospect Information entered in this block.
5. If Prospect Information exists. Skip to step 7.
6. If Prospect Information does NOT exist. Send an email to selle@uark.edu requesting the creation of a **Prospect ID**.

Once you have confirmed that a Prospect ID exists OR you have requested a ***Prospect ID*** *continue with Contact Report creation. DO NOT WAIT FOR* ***PROSPECT ID*** *CREATION.*

7. Scroll down on **Entity Overview** Screen. Look for **Contact Report List For Entity**.



Entity Overview — Actions Print

Dr[redacted] #42831 ***VIP***

Rec Type	Alumni (1962 Engineering), Faculty, More...	12/05/1939 (78)
Degree	BSIE 1962 Engineering More...	
PM Manager	Mr.[redacted]	
AAA	Life A+	Northwest Arkansas Chapter
	Married to: Mrs.[redacted] #160860 (FR)	Towers Old Main Accepted (Gold)

...	Distinguished Professors	Active		
...	Emeritus	Active		

Primary Credit Giving Summary (100010) — Actions Help

Credit	Hard Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	10,650.00	0.00	0.00	0.00	10,650.00
By Unit	463,514.84	1,501,262.50	0.00	0.00	1,964,777.34
Total	474,164.84	1,501,262.50	0.00	0.00	**1,975,427.34**

Last Transaction: $100,000.00 Other Irrev Planned Gift on Mar 06, 2018

Associated Credit Giving Summary (100011) — Actions Help

Credit	Recog Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	10,650.00	0.00	0.00	0.00	10,650.00
By Unit	813,298.12	1,611,762.50	0.00	0.00	2,425,060.62
Total	823,948.12	1,611,762.50	0.00	0.00	**2,435,710.62**

Contact Report List For Entity (90529) (1/29) — New Actions Help

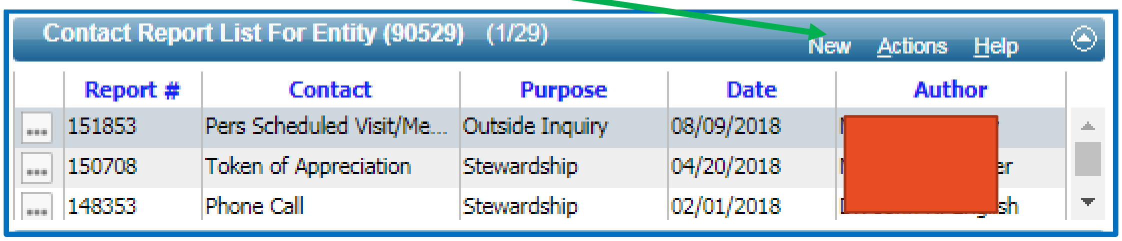
	Report #	Contact	Purpose	Date	Author
...	151853	Pers Scheduled Visit/Me...	Outside Inquiry	08/09/2018	Mrs[redacted]
...	150708	Token of Appreciation	Stewardship	04/20/2018	Mr.[redacted]
...	148353	Phone Call	Stewardship	02/01/2018	Dr.[redacted]

Membership Summary (50102) (1) — Actions Help

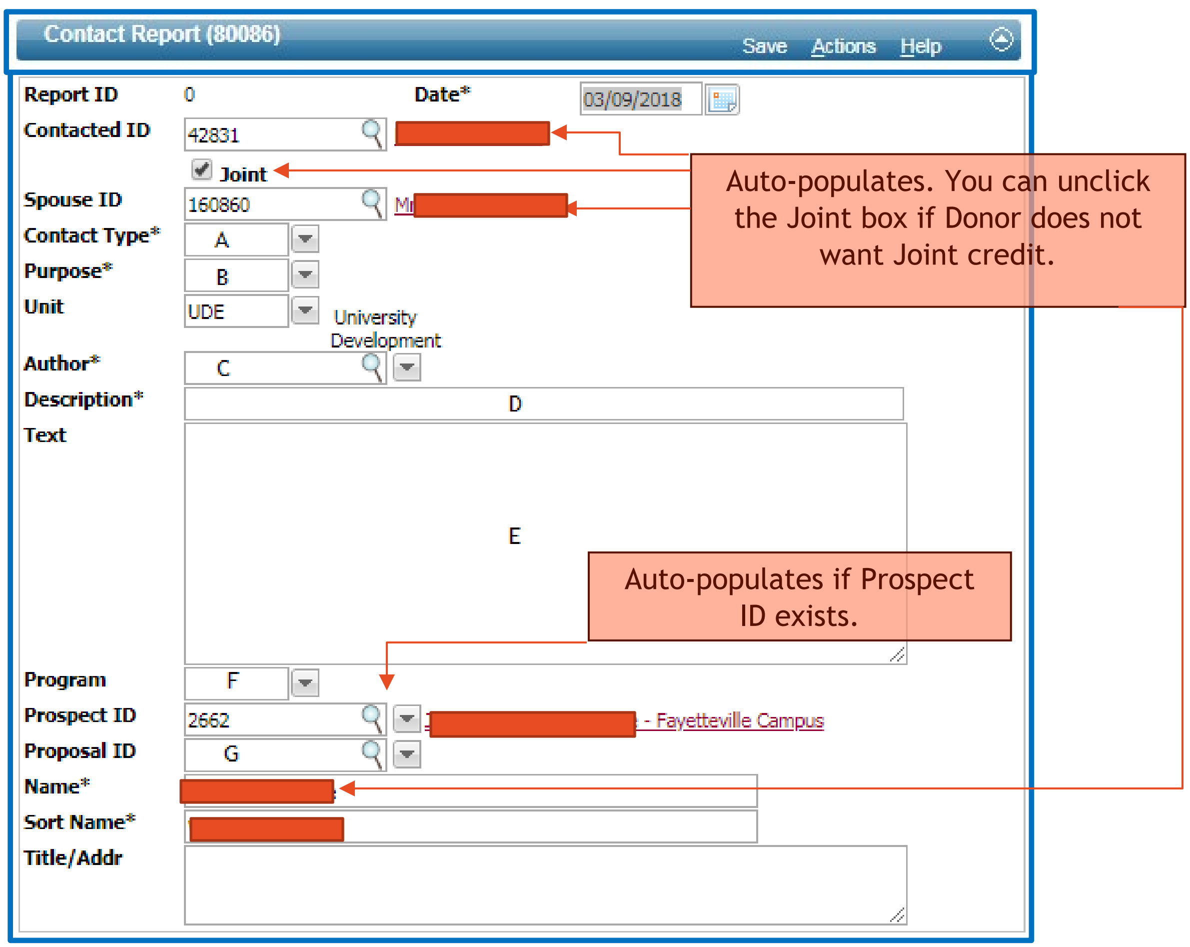
Member Since: 1962

Life A+ **Life Member Number:** **5000** Start: 05/01/1998 Expires:

8. Click New on the **Contact Report List for Entity**.



9. Fill out the **Contact Report**. (USE THE LETTER GUIDE BELOW)



A. Contact Type*

Contact Type	Definition
A	(**Attempted Contact**) tried to contact a current or prospective donor by phone, email or letter with no response
B	(**Token of Appreciation**) a memento that was presented or sent to a current or prospective donor or constituent
C	(**LinkedIn**) You connected with a current or prospective donor through LinkedIn
D	(**Twitter**) you tweeted and received a response for a current or prospective donor or you responded to a tweet from a current or prospective donor that started a dialogue
E	(**Email**) correspondence by email with a current or prospective donor
F	(**Facebook**) You connected with a current or prospective donor through Facebook
G	(**Campaign/Member**) An interaction with alumni, donors, and board members at a campaign or board meeting
I	(**Information**) Information on a current or prospective donor or constituent that will aid in the cultivation of the relationship with that individual or organization in the future
L	(**Letter**) Written correspondence in letter format that was sent by mail or email to a current or prospective donor
N	(**Events**) Occurrence that you host or attend, on or off campus, where you have an interaction with a current or prospective donor that is general in nature
P	(**Campus Visit/Meeting**) An interaction on campus by a DOD that was pre-arranged for a current or prospective donor to visit the University
R	(**Stewardship Reports**) A report to the donor on the status of an endowed or non-endowed fund or a project/program where they have provided financial or volunteer support
S	(**Personal Scheduled Visit/Meeting**) A pre-arranged, face-to-face interaction with a current or prospective donor, where the conversation moves the relationship forward on the donor commitment continuum
T	(**Phone Call**) Making or receiving a phone call with a current or prospective donor or constituent
U	(**Personal Unscheduled Visit/Meeting**) A chance interaction with a current or prospective donor where the conversation moves the relationship forward on the donor commitment continuum

V	(**Chat/IM**) You connected with a current or prospective donor through Chat/Instant Messaging platform

B. **Purpose*** (All Purposes are available but 4 have been set aside specifically for Development Officers.)

Purpose	Definition/Who Uses? (DOD specific in **green**)
Z	(Appreciation) Donor Relations
I	(1st Time Contact) This may only be entered one time. Only for the first time that a University representative meets with a Prospect. The system will NOT allow this to be assigned twice. It is important that this be used appropriately.
O	(Outside Inquiry) Records Group and Alumni Association
S	(Solicitation) Use when asking for the donation.
H	(Sponsorship) Alumni Association
W	(Stewardship) Use when meeting with Donor post-Solicitation/post-donation.
C	(Cultivation) Use when meeting with Donor pre-Solicitation
A	(Alumni Relations) Alumni Association
M	(Memberships) Alumni Association
R	(Records) Records Group
V	(Volunteer Activity) Alumni Association
P	(Programs) Alumni Association and Annual Programs

C. **Author***
- This is the person who had the Contact. Some Development Officers may have assistance entering their Contact Reports. If so, the Development Officer's name is entered in the Author box.

D. **Description***
- Type a meaningful description. Some reports ONLY show the Description line.

E. **Text**
- Enter Contact Report details here. **Who, What, When, Where, Why**

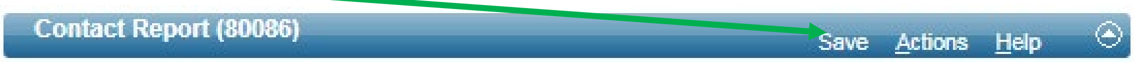
F. **Program**
- OPTIONAL. Choose an associated Program if necessary.

G. **Prospect ID**
- This will auto-populate if **Prospect ID** exists. If not this will be auto-populated on the 6th of month as new **Prospect IDs** update to CRs.

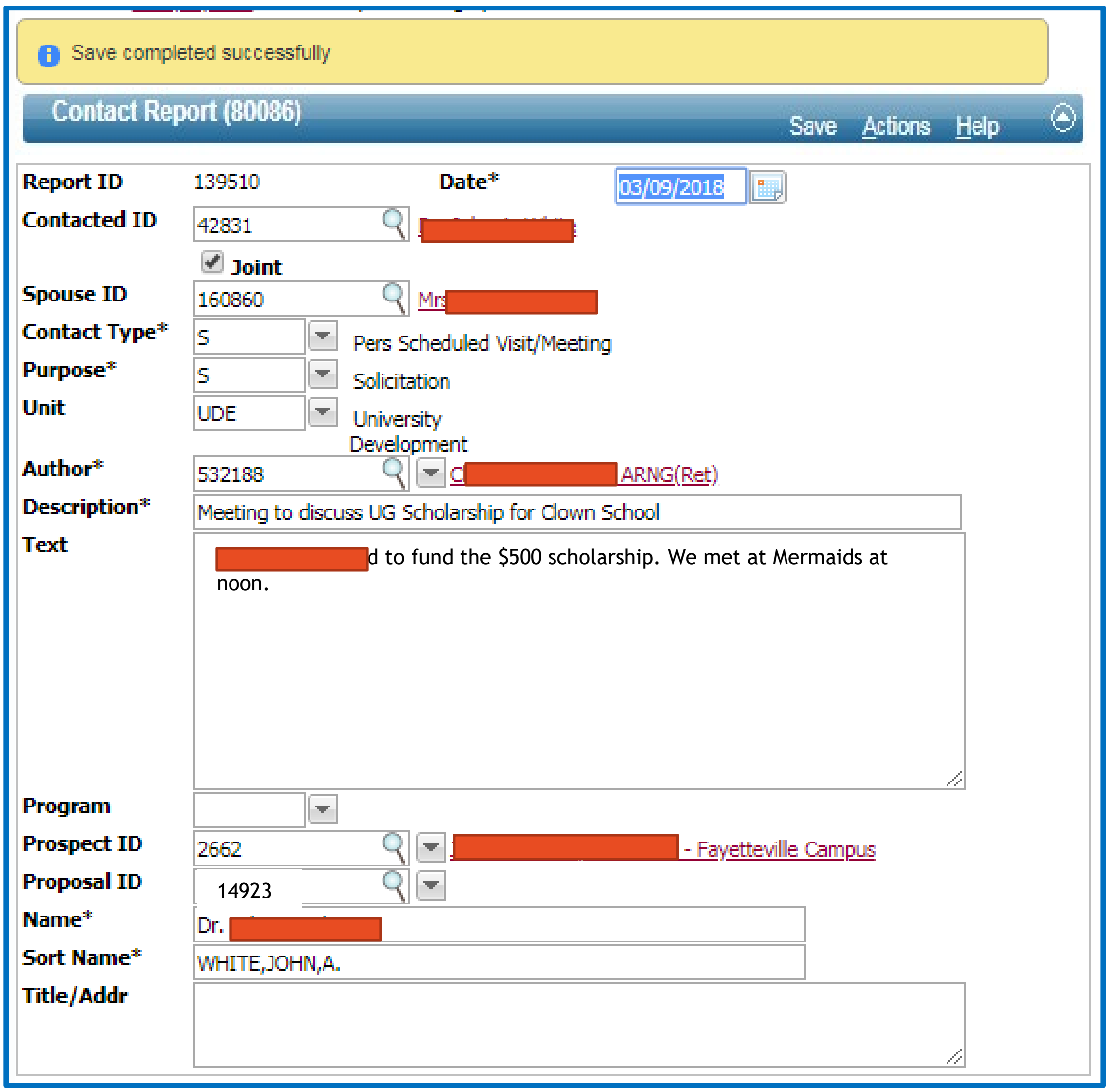
H. **Proposal ID**

- Enter **Proposal ID** if a Proposal is associated with this Contact.

10. Click Save from the blue bar.



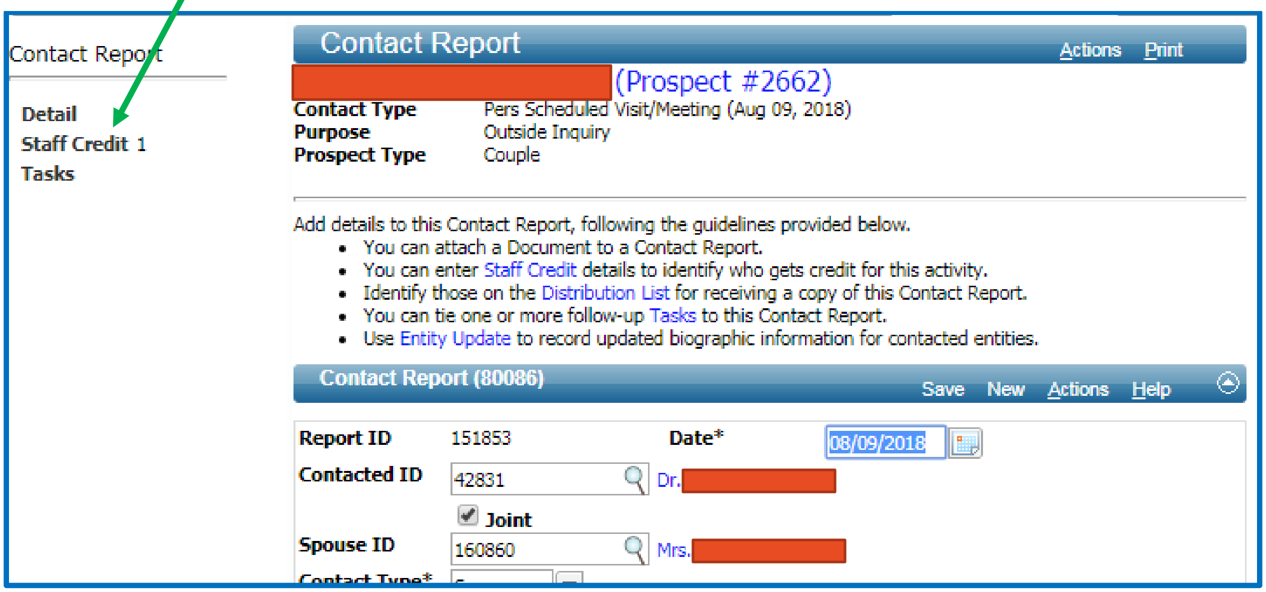
11. Your screen should look like this:



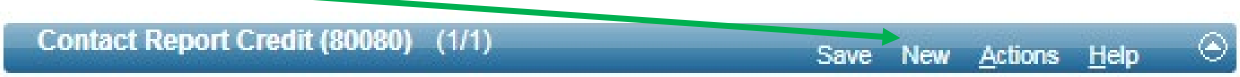
Give Staff Credit

Staff Credit is NOT mandatory. Staff Credit is given when more than one DOD takes part in a Contact.

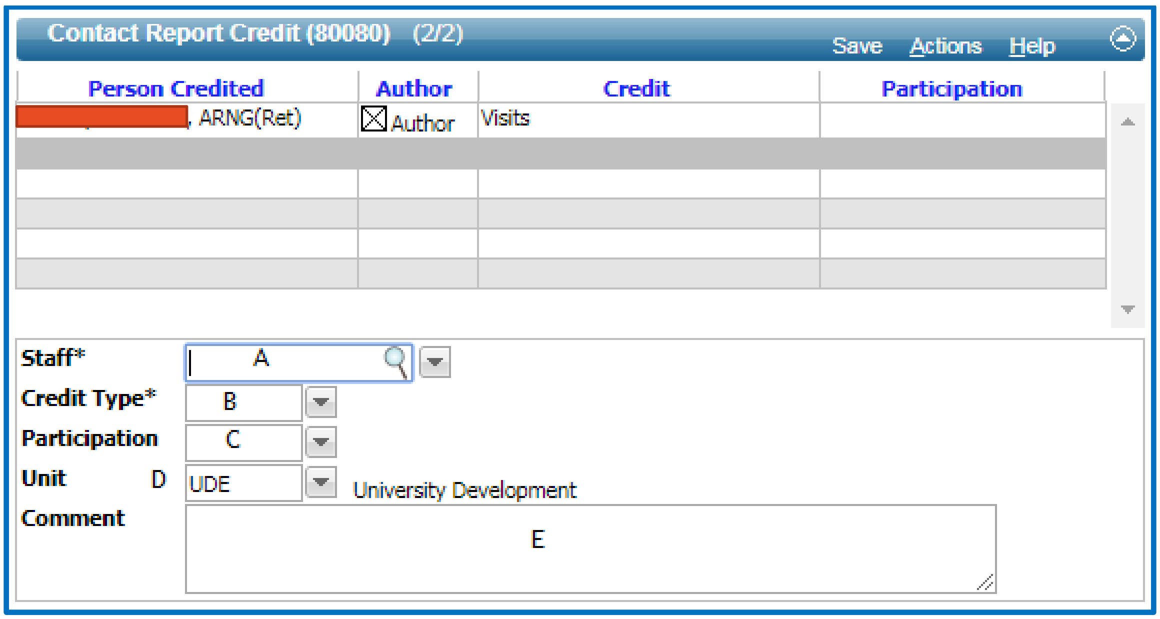
1. Choose **Staff Credit** from the Navigation Tree.



2. Select **New** from the **Contact Report Credit** blue bar.



3. Fill out the Contact Report Credit. (USE THE LETTER GUIDE BELOW)



A. Staff*
  - Enter staff member that attended meeting and should receive credit.

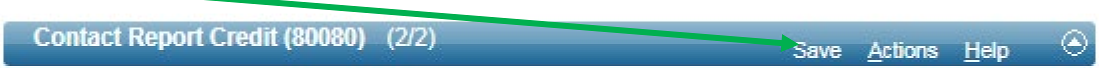
B. Credit Type*
  - Letters - Staff member sent letters.
  - Phone Calls - Staff member made phone calls.
  - Visits - Staff member made visits.
  - Other - Use this for all other assistance. Make sure to put in a comment specifying Other type.

C. Participation
  - Specify Participated or Provided Introduction.

D. Unit
  - Choose staff member's unit.

E. Comment
  - Use Comment for any clarifying notes.

4. Click Save from the Contact Report Credit blue bar.



5. Your screen should look like this:

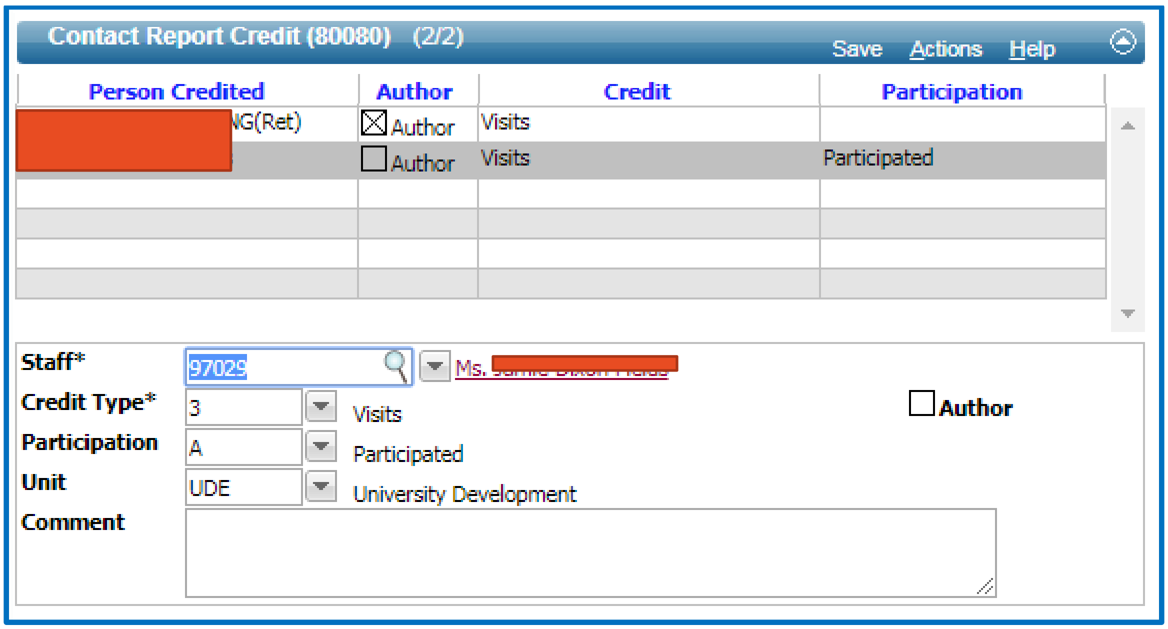
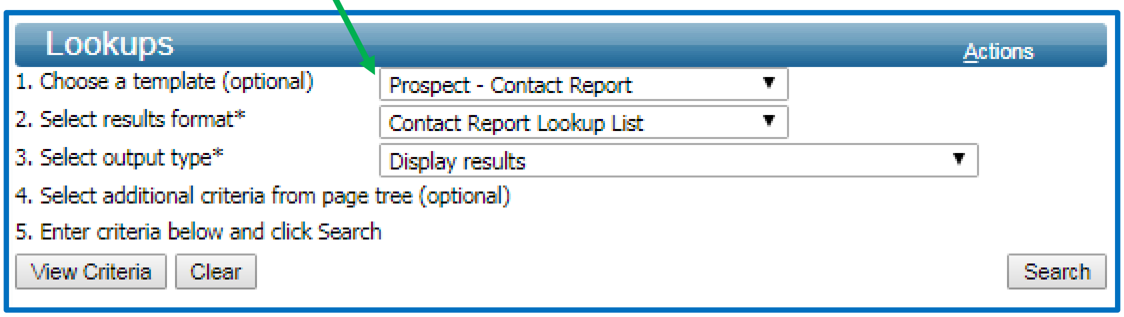


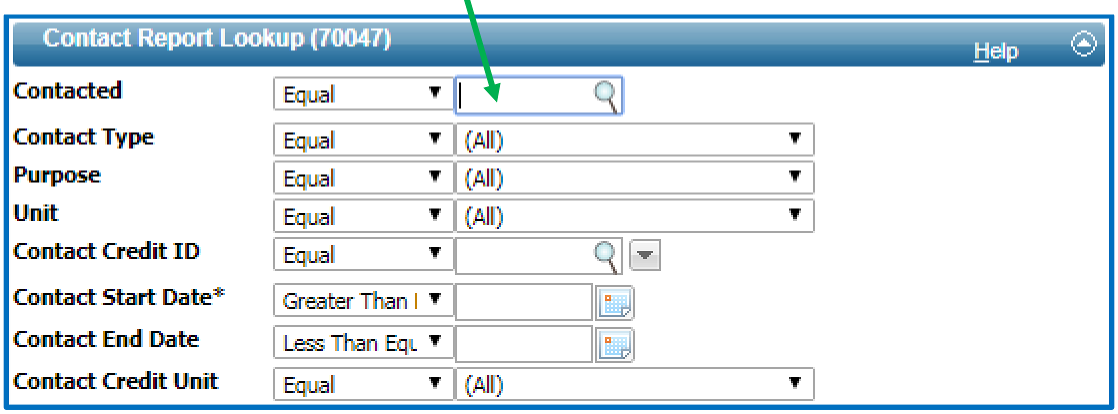
Table of Contents

FINDING ALL CONTACT REPORTS FOR A SINGLE ENTITY

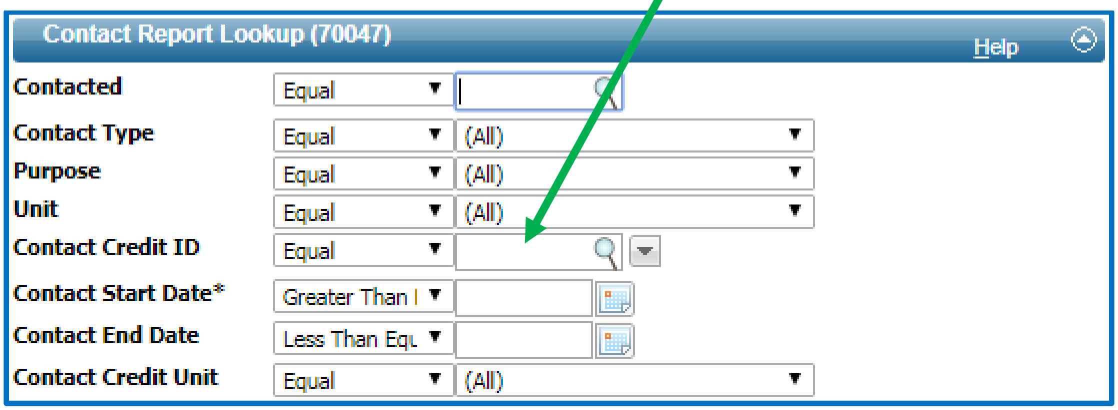
1. Click the **Lookups** icon from the Main Menu. 
   2. Change "**Choose a template (optional)**" to Prospect – Contact Report.



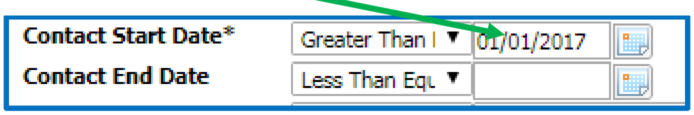
3. Enter Entity ID Number in the "**Contacted**" block. Any Entity ID will work as long as they have Contact Reports entered into the system.



4. Enter DOD Entity ID Number or name in the "Contact Credit ID" block. THIS IS OPTIONAL. IF YOU WANT TO SEE ALL CONTACTS WITH A DONOR REGARDLESS OF THE DOD LEAVE THE CONTACT CREDIT ID FIELD BLANK.

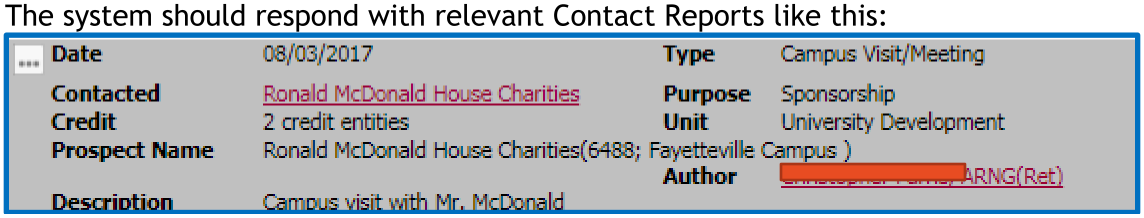


5. Change the "Contact Start Date*" to the date of the oldest report you want to see. THIS IS REQUIRED.



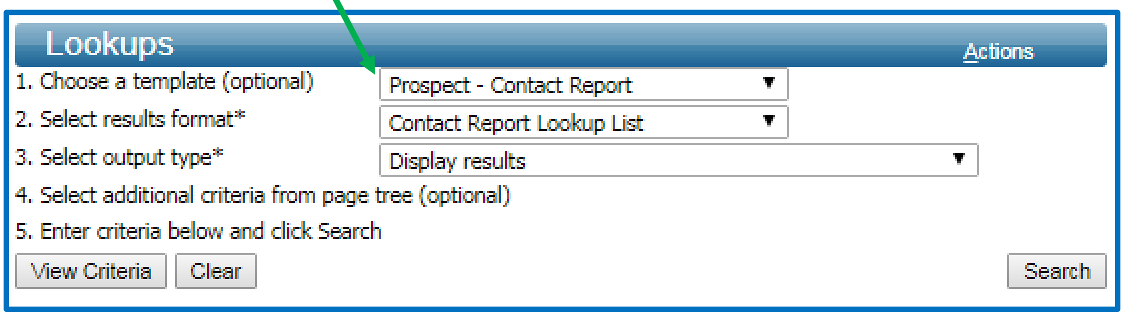
6. Click "Search."

7. The system should respond with relevant Contact Reports like this:

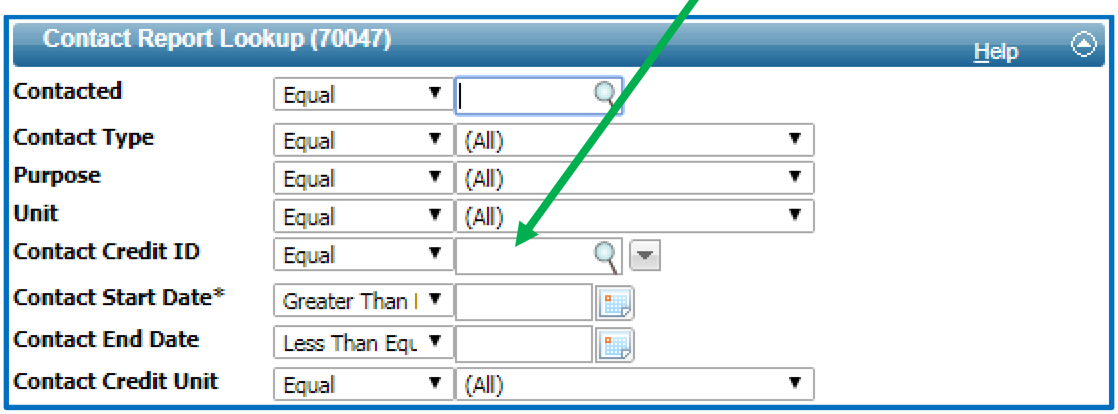


FINDING ALL CONTACT REPORTS FOR A SPECIFIC DOD

8. Click the Lookups icon from the Main Menu.
   9. Change "Choose a template (optional)" to Prospect - Contact Report.



10. Enter DOD Entity ID Number or name in the "Contact Credit ID" block.



11. Change the "Contact Start Date*" to the date of the oldest report you want to see. THIS IS REQUIRED.

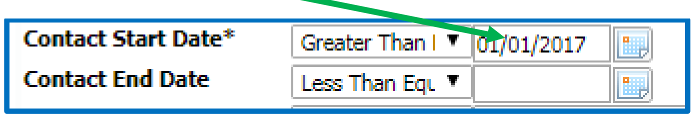
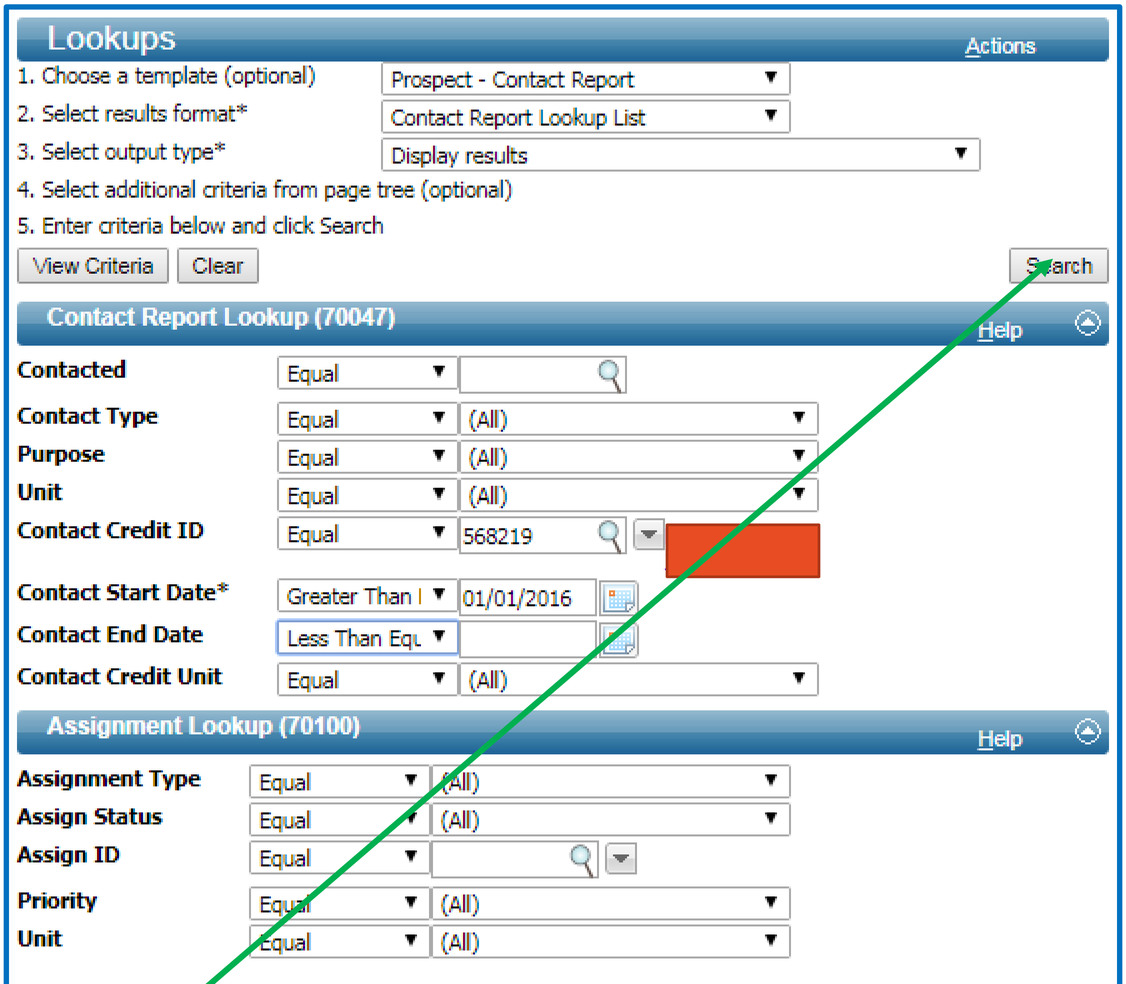


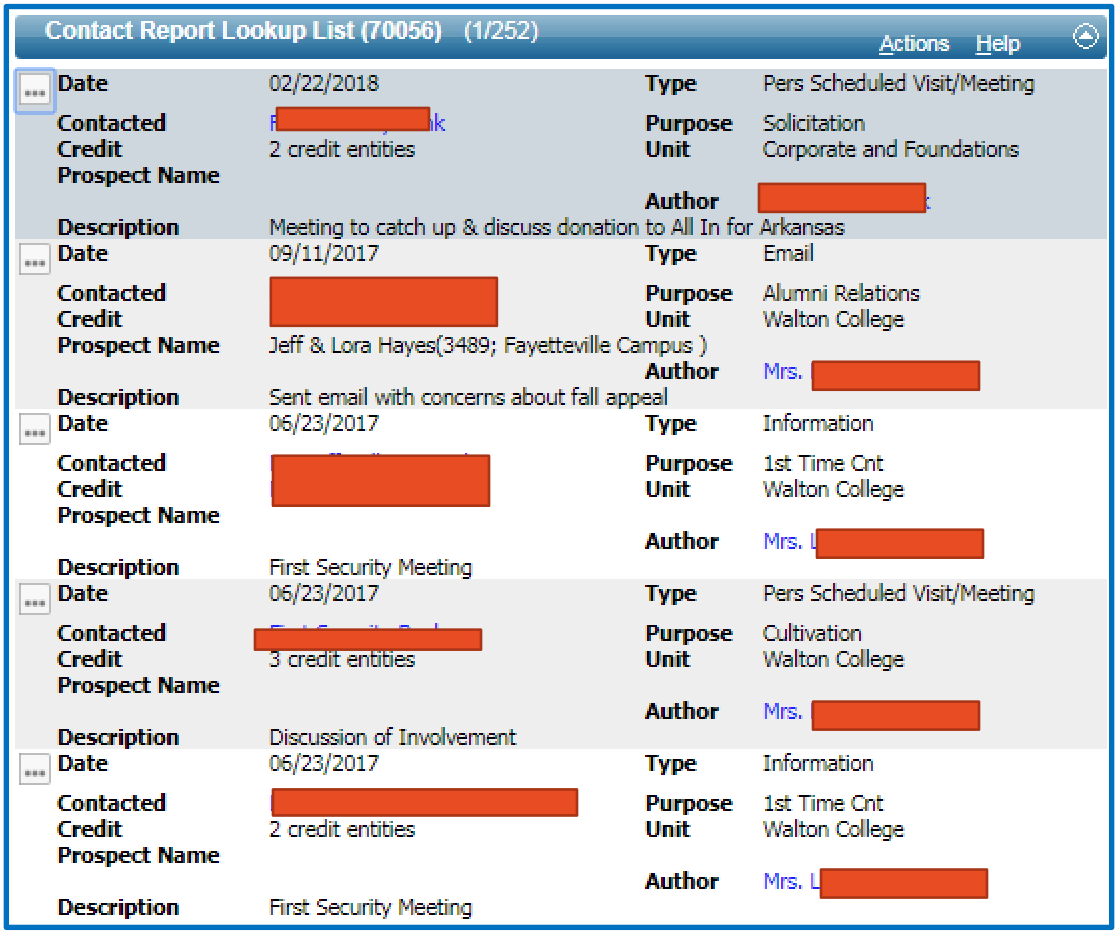
Table of Contents

12. Your screen should look like this:



13. Click "**Search**."

14. The above example **Lookup** will return all Contact Reports made by Lizzie Johnson after 01/01/2016.



Contact Report Lookup List (70056) (1/252) Actions Help

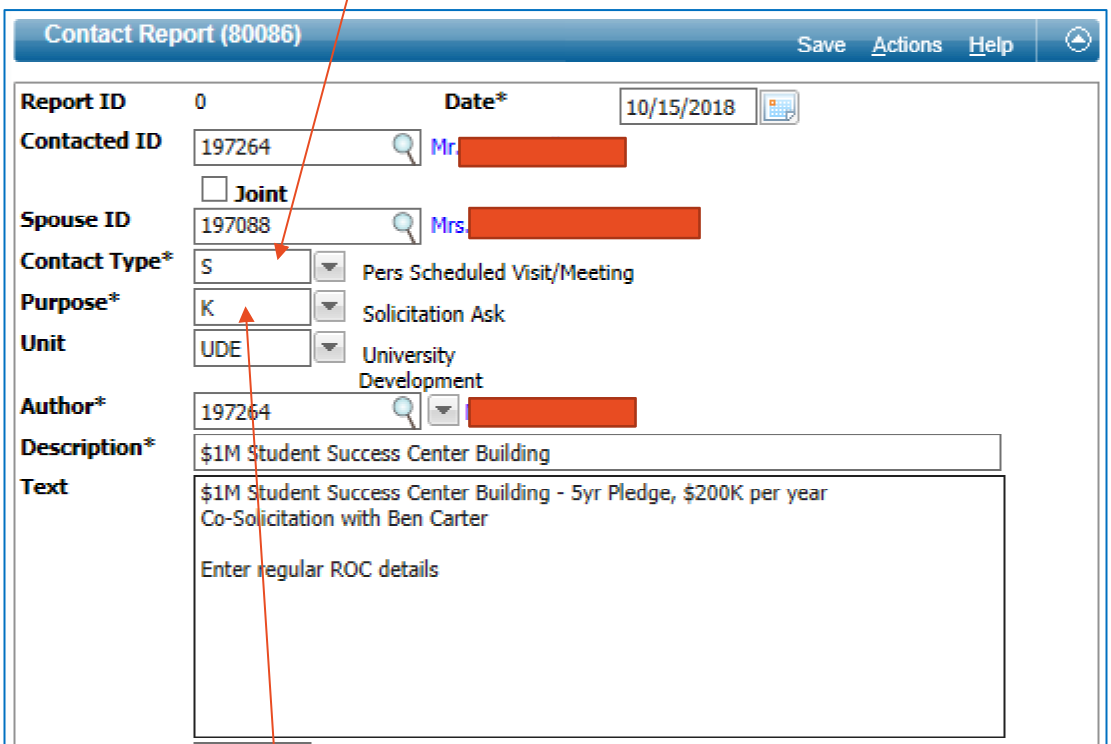
Date	02/22/2018	**Type**	Pers Scheduled Visit/Meeting
Contacted	[redacted]	**Purpose**	Solicitation
Credit	2 credit entities	**Unit**	Corporate and Foundations
Prospect Name		**Author**	[redacted]
Description	Meeting to catch up & discuss donation to All In for Arkansas		
Date	09/11/2017	**Type**	Email
Contacted	[redacted]	**Purpose**	Alumni Relations
Credit		**Unit**	Walton College
Prospect Name	Jeff & Lora Hayes(3489; Fayetteville Campus)	**Author**	Mrs. [redacted]
Description	Sent email with concerns about fall appeal		
Date	06/23/2017	**Type**	Information
Contacted	[redacted]	**Purpose**	1st Time Cnt
Credit		**Unit**	Walton College
Prospect Name		**Author**	Mrs. [redacted]
Description	First Security Meeting		
Date	06/23/2017	**Type**	Pers Scheduled Visit/Meeting
Contacted	[redacted]	**Purpose**	Cultivation
Credit	3 credit entities	**Unit**	Walton College
Prospect Name		**Author**	Mrs. [redacted]
Description	Discussion of Involvement		
Date	06/23/2017	**Type**	Information
Contacted	[redacted]	**Purpose**	1st Time Cnt
Credit	2 credit entities	**Unit**	Walton College
Prospect Name		**Author**	Mrs. [redacted]
Description	First Security Meeting		

Table of Contents

MAKE SURE YOU HAVE SAVED YOUR WORK!

Record a Proposal In Contact Reports

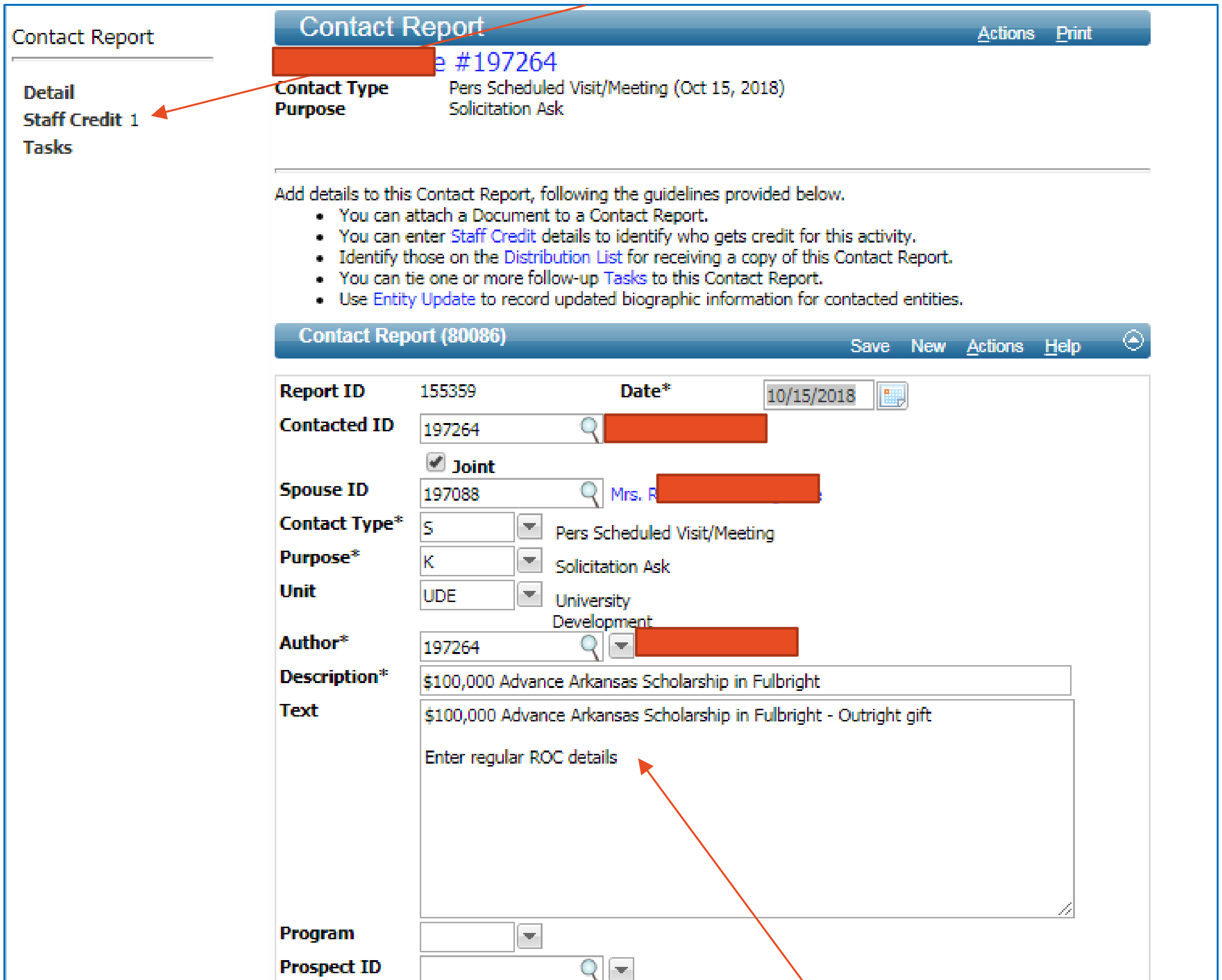
1. Select a Contact Type.



2. Select a Purpose.
   a. **Solicitation Ask:** Donor was asked to financially support the university
   b. **Solicitation Accepted:** Donor has agreed (verbally or in writing) to the ask and confirmed dollar amount
   c. **Solicitation Declined:** Donor said no/rejected the ask OR the ask was administratively closed
   d. **Solicitation Funded**: Prospect Management and/or Gift Services will mark a solicitation as funded when the money is received, a gift agreement is fully executed, or when a pledge document is submitted (development officers do not have access to the "funded" code)

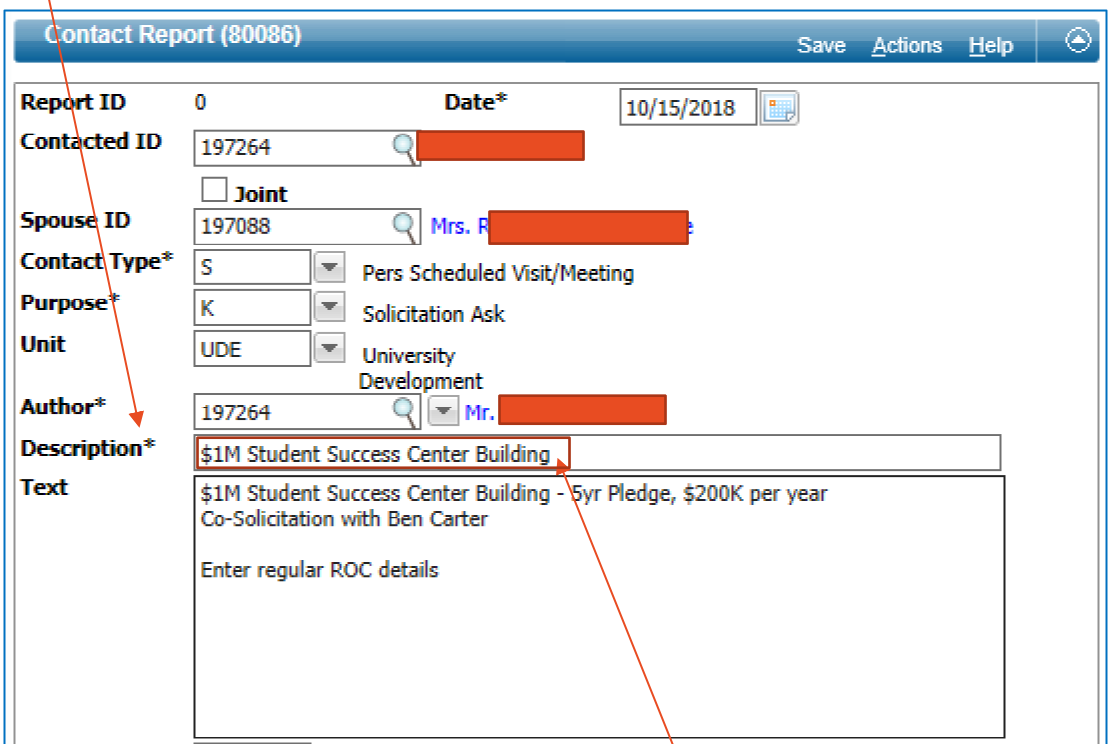
Table of Contents

3. Select an AUTHOR
   a. If there is a co-solicitor, select **Staff Credit**



   b. * please be sure to capture staff credit in the context as well *

4. Add a Description using the following guidelines:
    a. Ask amount should be stated first
    b. Purpose should be stated second
    c. Allocation should be stated third



IMPORTANT: Examples of Proposal ROC Descriptions

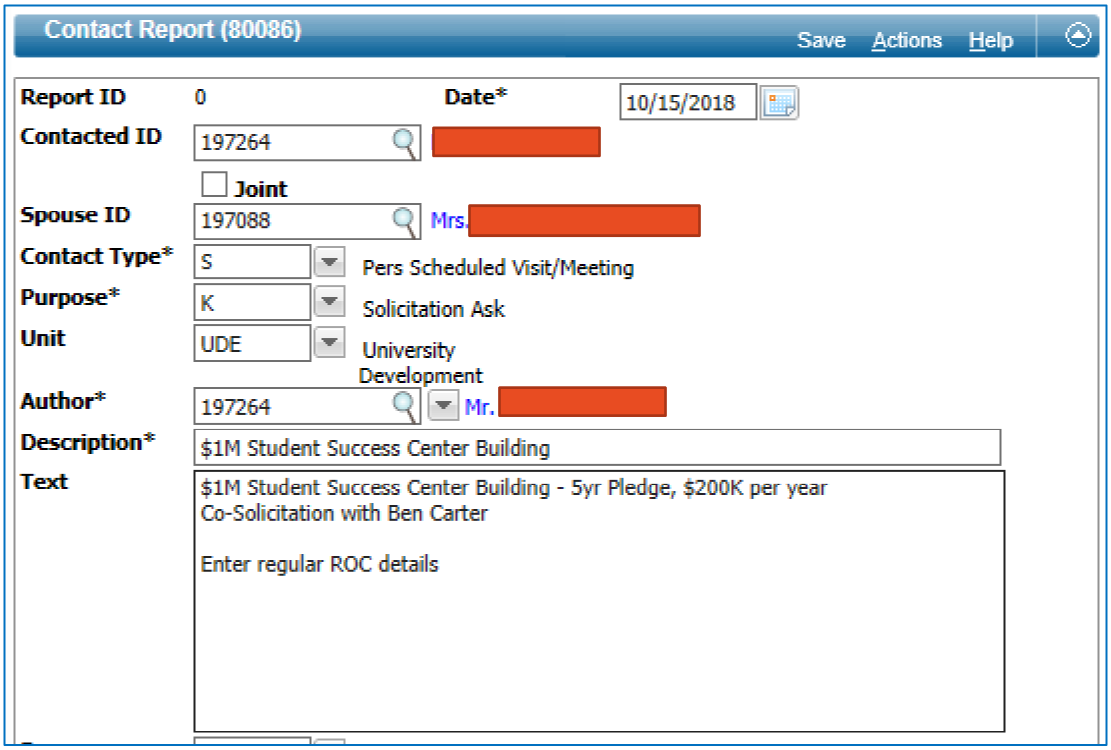
Solicitation Ask
$1M Student Success Center Building

Solicitation Accepted
Accepted $1M Student Success Center Building

Solicitation Declined
Declined $1M Student Success Center Building

Examples of Completed Proposal ROCs

Solicitation Ask - Example with a Co-Solicitation Manager


Contact Report (80086)   Save   Actions   Help

Report ID 0   Date* 10/15/2018

Contacted ID 197264 [redacted]

Joint

Spouse ID 197088 Mrs.[redacted]

Contact Type* S Pers Scheduled Visit/Meeting

Purpose* K Solicitation Ask

Unit UDE University Development

Author* 197264 Mr.[redacted]

Description* $1M Student Success Center Building

Text
$1M Student Success Center Building - 5yr Pledge, $200K per year
Co-Solicitation with Ben Carter

Enter regular ROC details

Solicitation Accepted Example

Contact Report (80086) — Save | New | Actions | Help

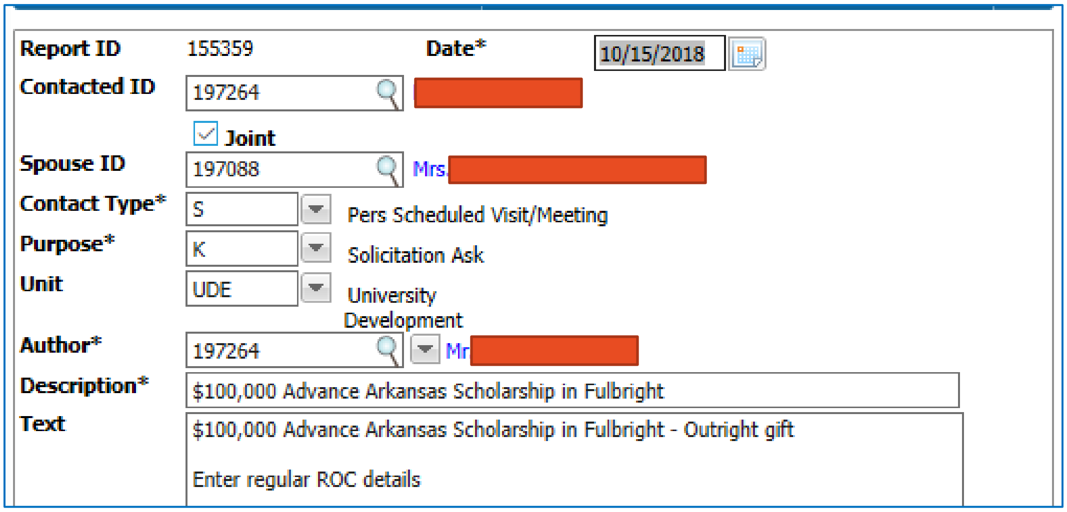
Report ID	155357	**Date***	10/22/2018
Contacted ID	197264	[redacted]	
	☑ **Joint**		
Spouse ID	197088	Mrs. [redacted]	
Contact Type*	T	Phone Call	
Purpose*	N	Solicitation Accepted	
Unit	UDE	University Development	
Author*	197264	M [redacted]	
Description*	Accepted $1M Student Success Center Building		
Text	Accepted $1M Student Success Center Building - 5yr Pledge, $200K per year Phone call to answer questions and get thoughts on the proposal. Confirmed they would like to fulfill the gift.		

Solicitation Declined Example

Contact Report (80086) — Save | Actions | Help

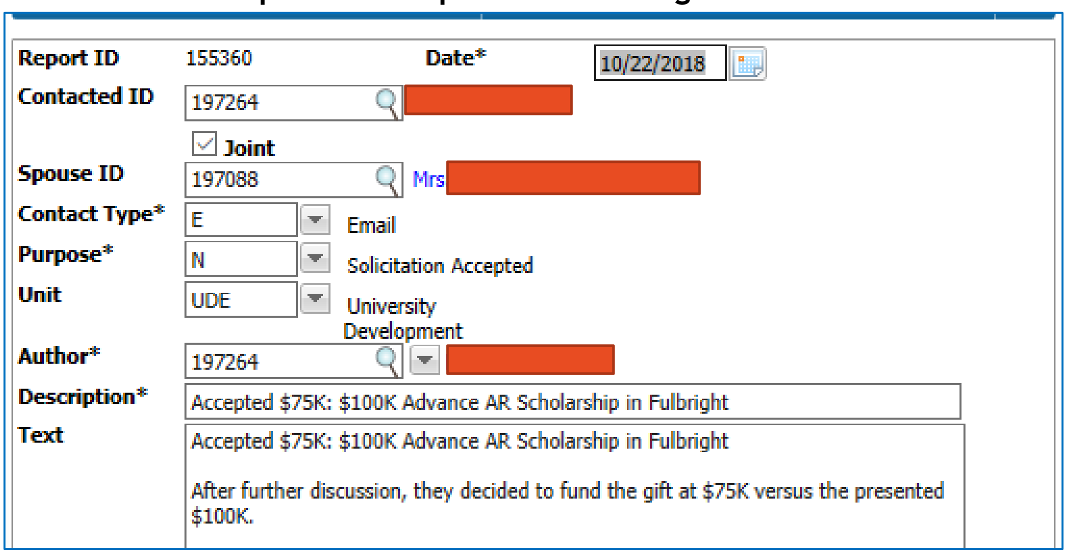
Report ID	0	**Date***	11/29/2018
Contacted ID	197264	M [redacted]	
	☑ **Joint**		
Spouse ID	197088	Mrs. [redacted]	
Contact Type*	T	Phone Call	
Purpose*	Q	Solicitation Declined	
Unit	UDE	University Development	
Author*	197264	M [redacted]	
Description*	Declined $1M Student Success Center Building		
Text	Declined $1M Student Success Center Building Enter regular ROC details		

Solicitation Ask Example



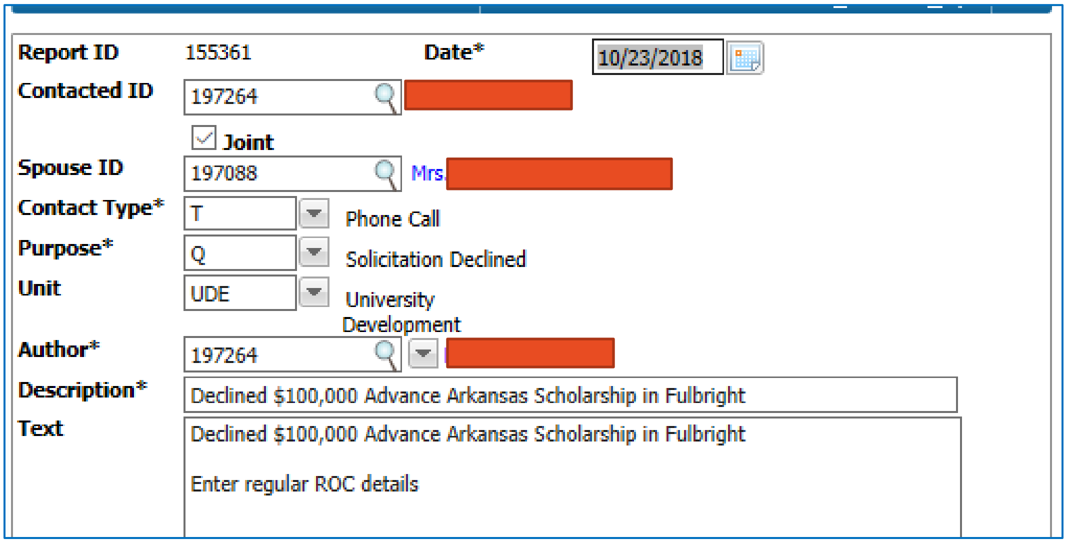
Report ID	155359	**Date***	10/15/2018
Contacted ID	197264 [redacted]		
	Joint		
Spouse ID	197088 Mrs. [redacted]		
Contact Type*	S	Pers Scheduled Visit/Meeting	
Purpose*	K	Solicitation Ask	
Unit	UDE	University Development	
Author*	197264 Mr [redacted]		
Description*	$100,000 Advance Arkansas Scholarship in Fulbright		
Text	$100,000 Advance Arkansas Scholarship in Fulbright - Outright gift Enter regular ROC details		

Solicitation Accepted - Example with Funding Lower than Ask Amount



Report ID	155360	**Date***	10/22/2018
Contacted ID	197264 [redacted]		
	Joint		
Spouse ID	197088 Mrs [redacted]		
Contact Type*	E	Email	
Purpose*	N	Solicitation Accepted	
Unit	UDE	University Development	
Author*	197264 [redacted]		
Description*	Accepted $75K: $100K Advance AR Scholarship in Fulbright		
Text	Accepted $75K: $100K Advance AR Scholarship in Fulbright After further discussion, they decided to fund the gift at $75K versus the presented $100K.		

Solicitation Declined Example



Report ID	155361	**Date***	10/23/2018
Contacted ID	197264 [redacted]		
	☑ **Joint**		
Spouse ID	197088 Mrs. [redacted]		
Contact Type*	T	Phone Call	
Purpose*	Q	Solicitation Declined	
Unit	UDE	University Development	
Author*	197264 [redacted]		
Description*	Declined $100,000 Advance Arkansas Scholarship in Fulbright		
Text	Declined $100,000 Advance Arkansas Scholarship in Fulbright Enter regular ROC details		

MAKE SURE YOU HAVE SAVED YOUR WORK!

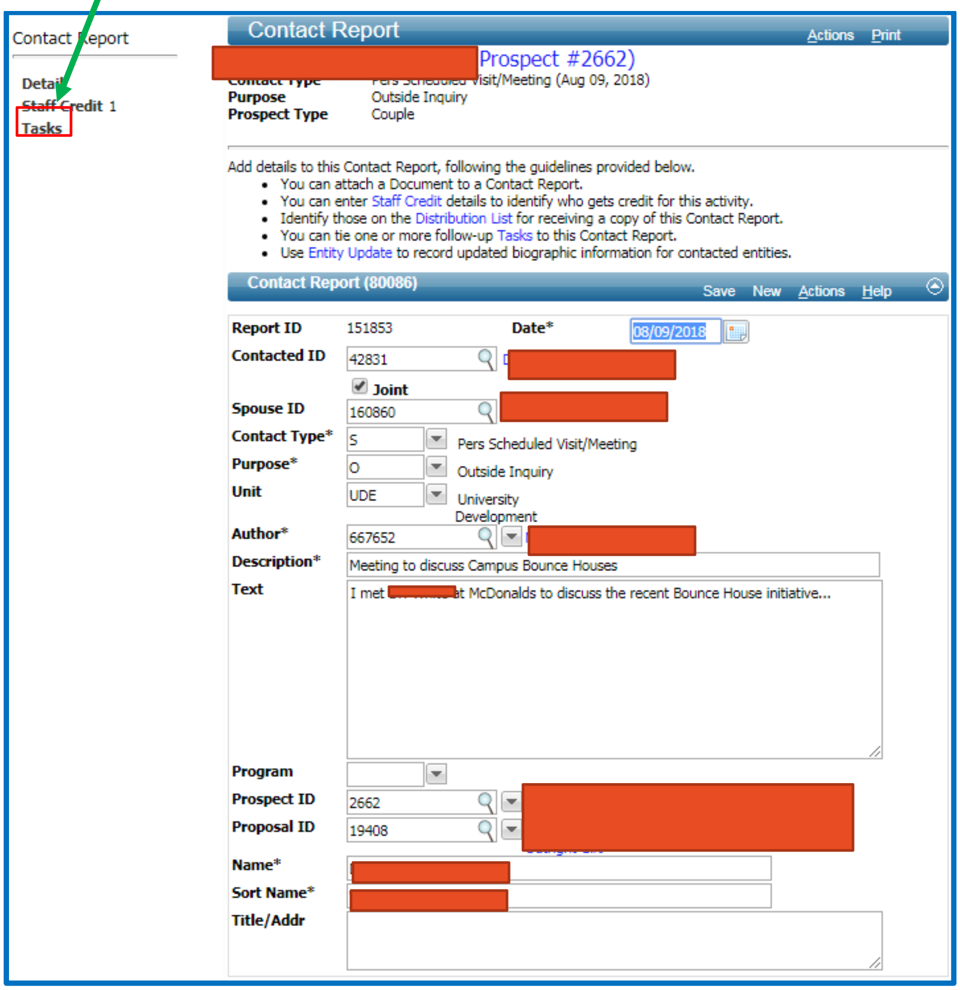
Tasks

This instruction is for adding Tasks that pertain to Non-Transformational List prospects only.

Method 1: Enter Task from your Contact Report

From the Contact Reports Screen.

1. Select Tasks from the Nav Tree on the left.



Skip to page 24 of this Manual

Method 2: Use the Lookup Tool

Use the Advance **Lookup** tool to find the Prospect in question.

1. Search for the Entity first.

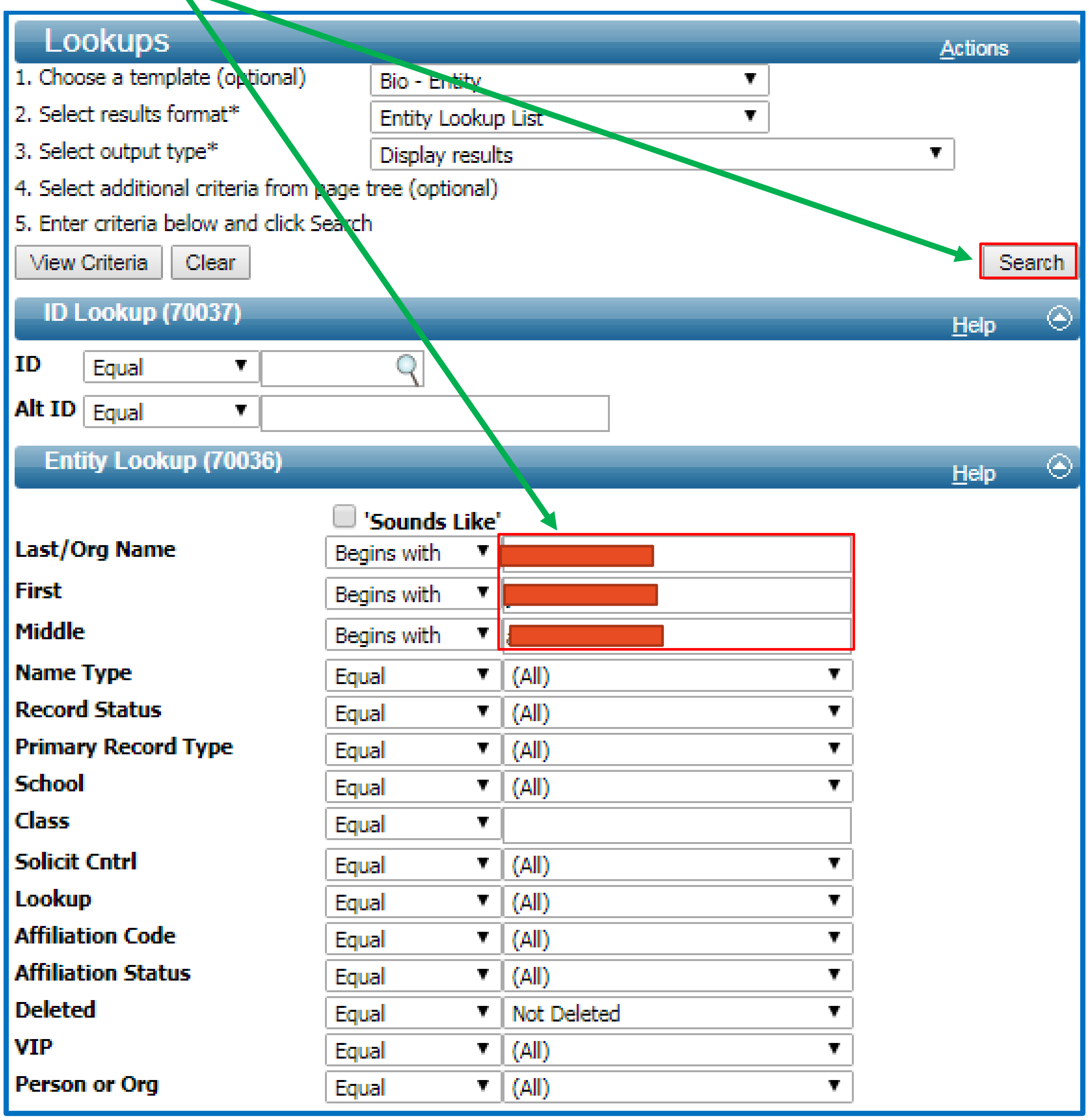
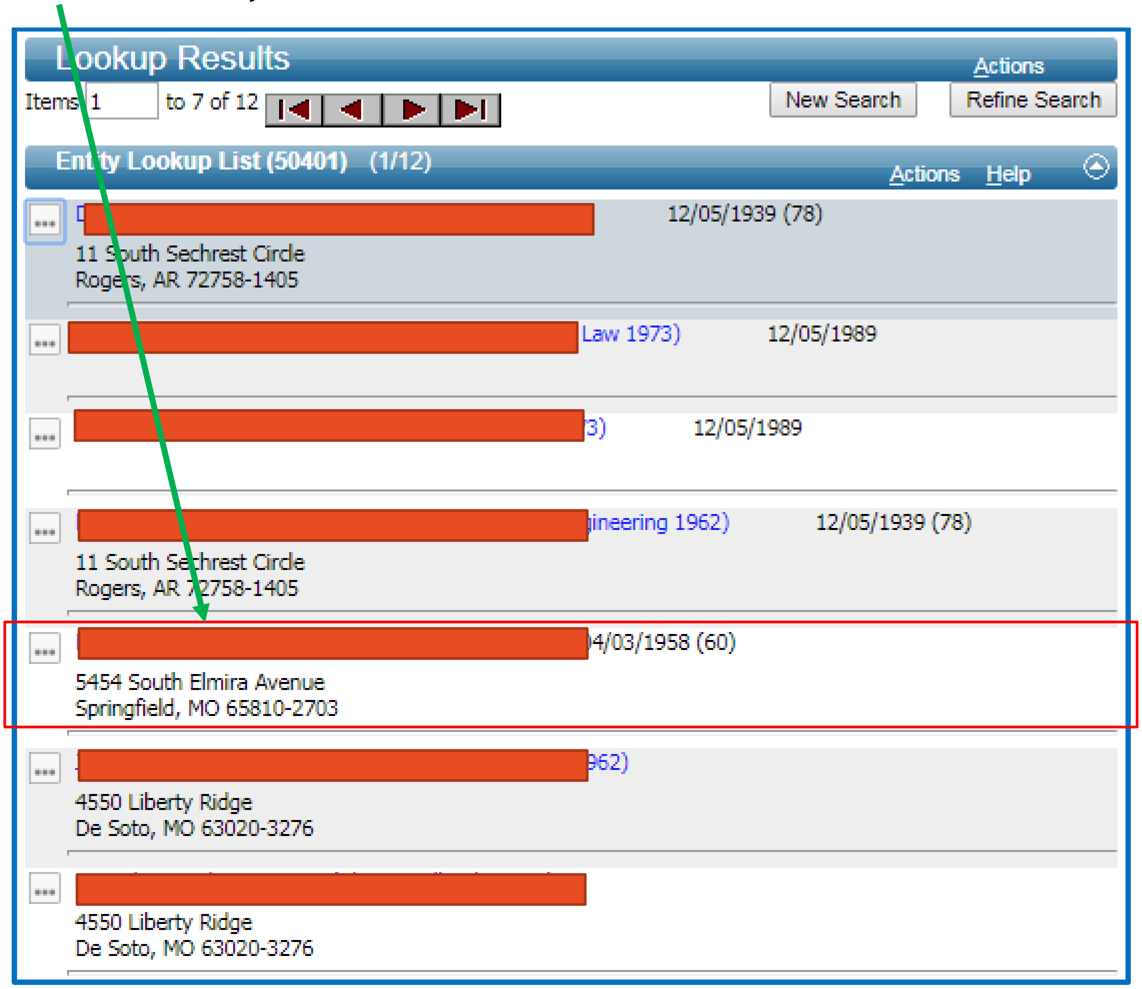
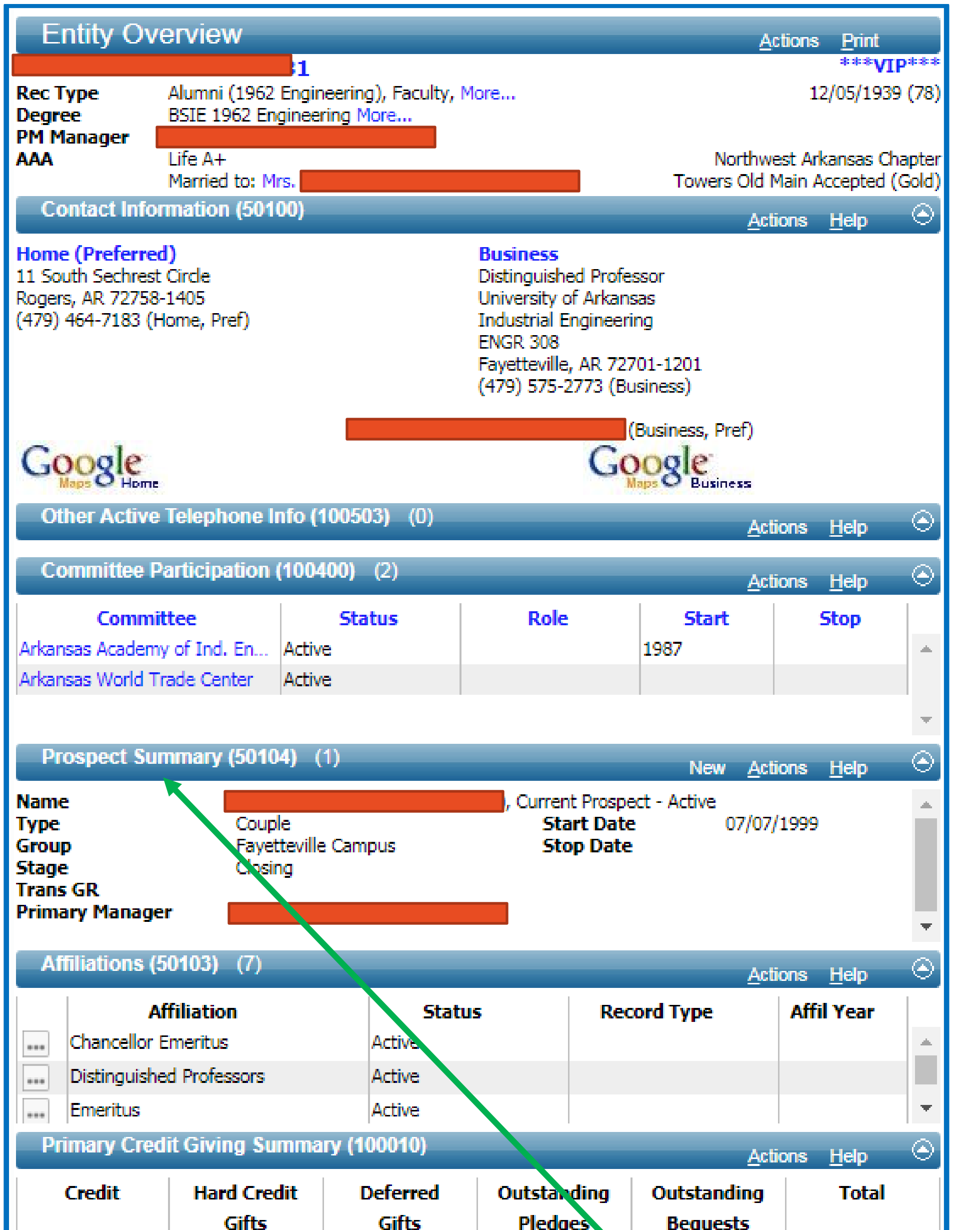


Table of Contents

2. Click on the Entity's link.

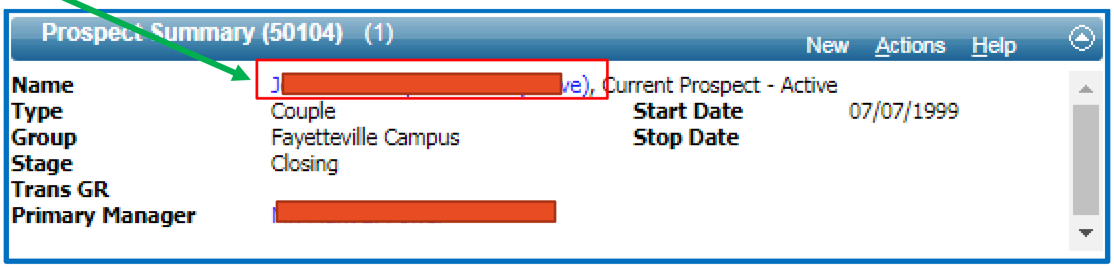


3. From the **Entity Overview**.

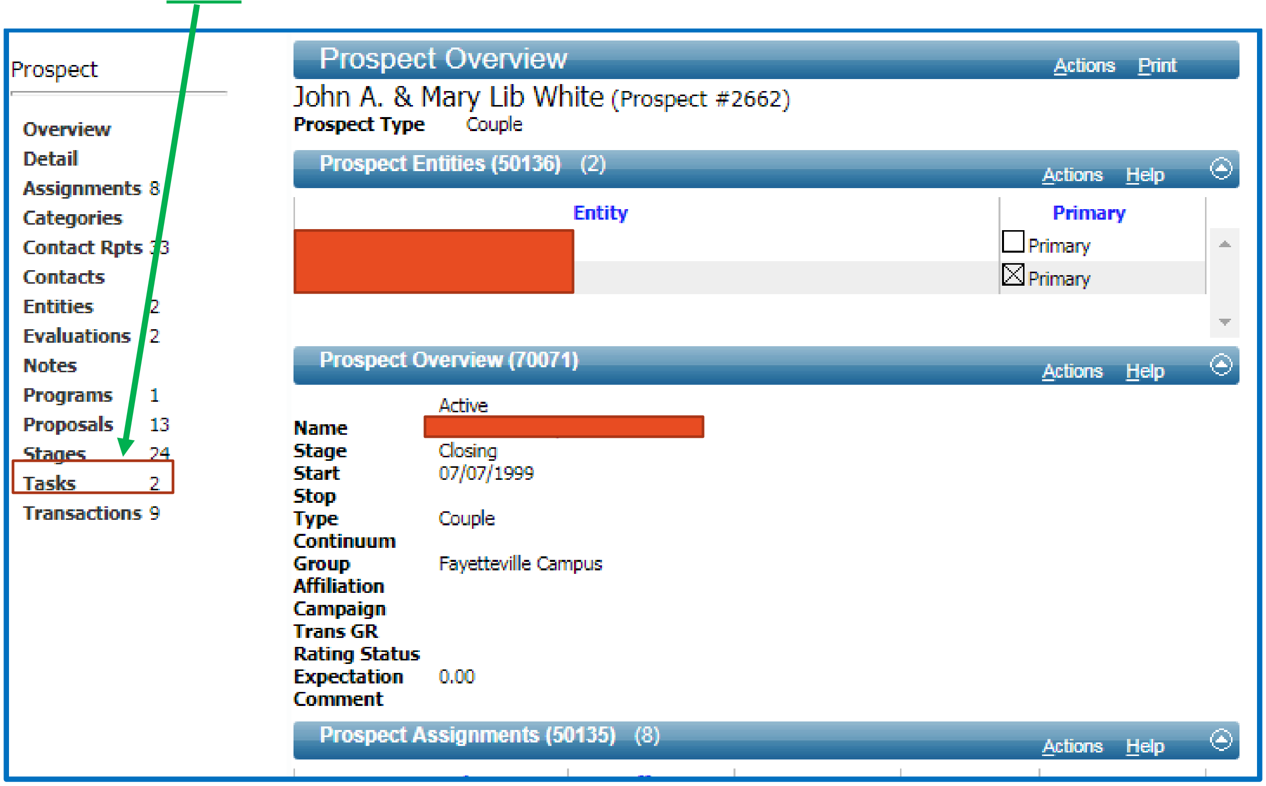


4. Look for the blue bar that says **Prospect Summary**.

5. Click on the Prospect identified under the blue bar.



6. Once you have found the Prospect Overview…
7. Click on Tasks from the Nav Tree.



Important Task Notes

- There are 2 types of tasks:

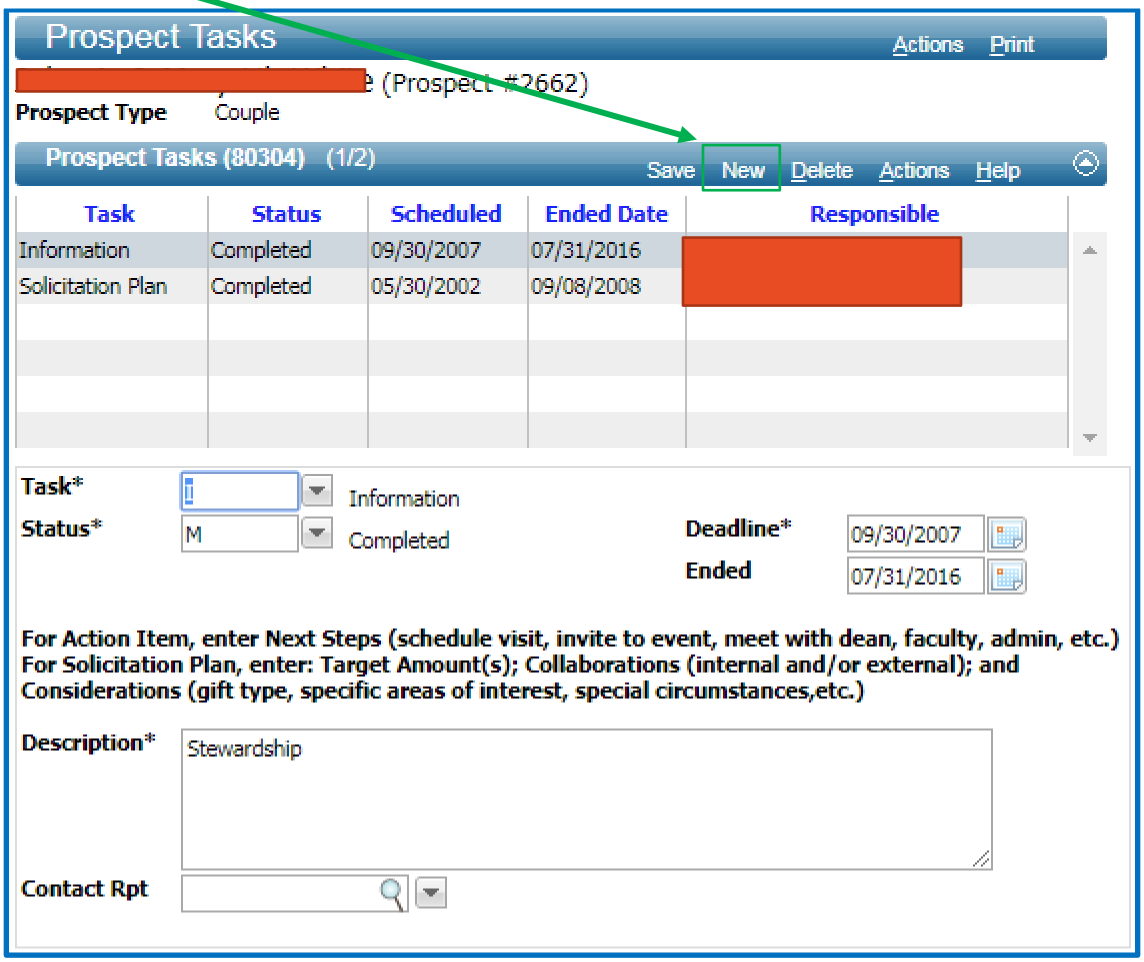
1. Solicitation Plan – Created as an overall strategic plan for soliciting a gift from a donor
2. Action Item – Created to keep track of individual actions that need to be completed to support the Solicitation Plan

- VERY IMPORTANT!!! THERE SHOULD BE A SOLICITATION PLAN BEFORE THERE IS AN ACTION ITEM. ACTION ITEMS ARE INTENDED TO SUPPORT THE SOLICITATION PLAN.
- Reports are available to review your Solicitation Plans and Action items for PM Assignments

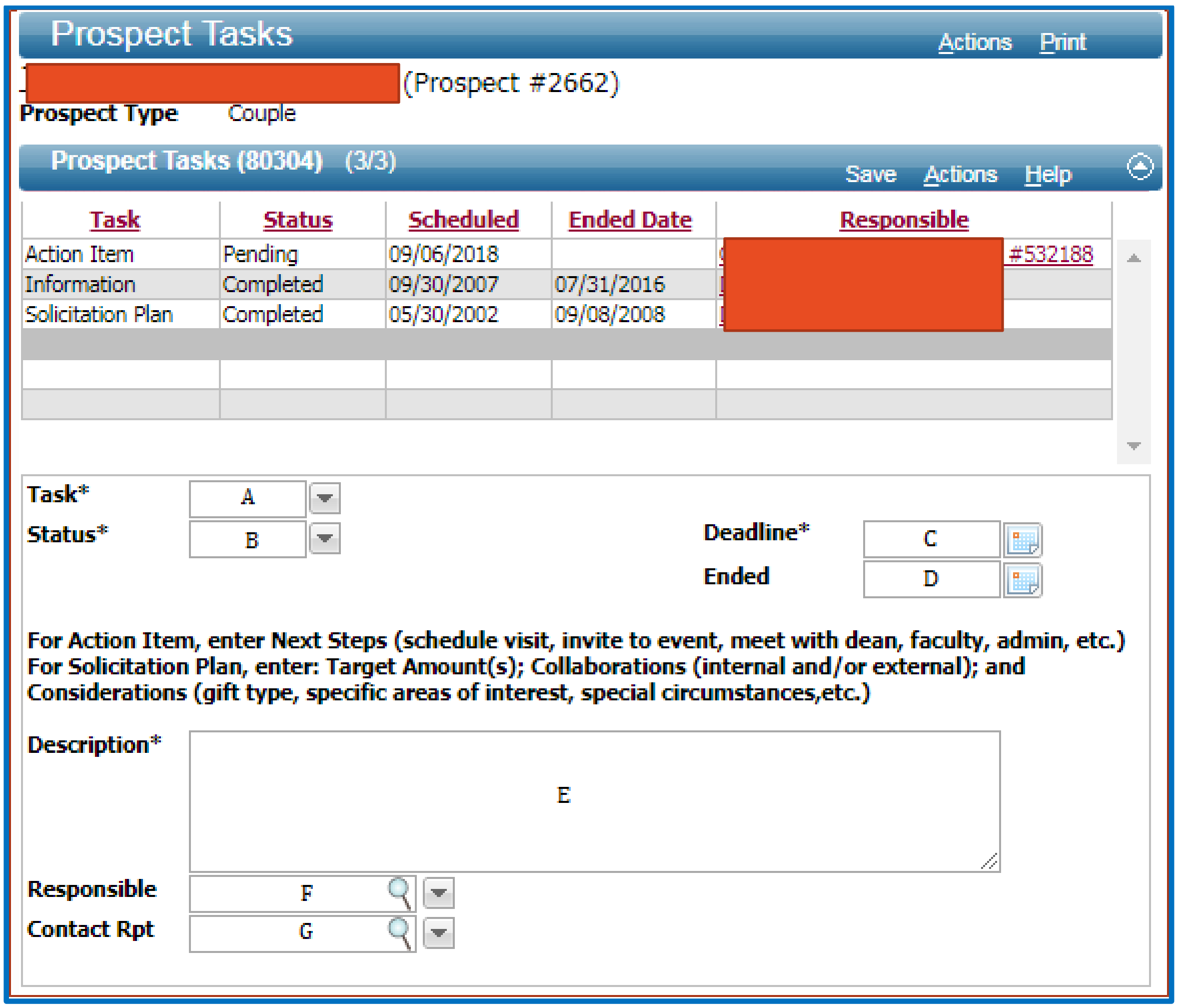
Table of Contents

Create a Task

1. Select New from the Prospect Tasks blue bar.



2. Fill out the relevant fields (If the field has a * it is required):



A. Task*

- Choose Solicitation Plan if this is the task that represents the overall plan of approach. ALL PROSPECTS MUST HAVE A SOLICITATION PLAN TASK.
- Choose Action Item if this task supports the overall Solicitation Plan. ACTION ITEMS REQUIRE AN EXISTING SOLICITATION PLAN TASK.

B. **Status** (Set to one of the following:)
   - **Pending** – If this is a new task that is not yet completed.
   - **Cancelled** – If this task has not been completed and is no longer needed.
   - **Complete** – If this task has been completed. (MAKE SURE YOU SET ENDED DATE AS WELL.)
   - **Past Due** – Advance AUTOMATICALLY marks overdue if task remains in Pending state after the Deadline date set upon task creation.

C. **Deadline***. This is the date by which the task must be completed.

D. **Ended**. Enter this date when the task has been completed. (MAKE SURE YOU CHANGE THE STATUS TO COMPLETE.)

E. **Description***. There are rules for what you enter into the two types of Task:

IF YOU ARE ENTERING A SOLICITATION PLAN

Description*

Notes:

Collaborations (Internal and/or External)

Considerations (Gift Type, Areas of Interest, Special Circumstances, etc.)

IF YOU ARE ENTERING AN ACTION ITEM

Description*

Action Item:

* Schedule Visit *Invite to Event

* Meet with Dean *Etc.

F. **Responsible**. Enter the Advance ID of the person responsible for the task. THIS MAY BE YOU. If you do not know the Advance ID you can use the magnifying glass to look the responsible person up.

G. **Contact Report**. If a Contact Report exists for this task, insure that you link to it in this field. You may use the drop-down box to choose the Contact Report or you can use the magnifying glass to look it up. If you created the task from a Contact Report this will already be identified.

3. Once you have completed filling out the Task form:
4. Click Save from the blue bar.
5. Advance should look something like this:

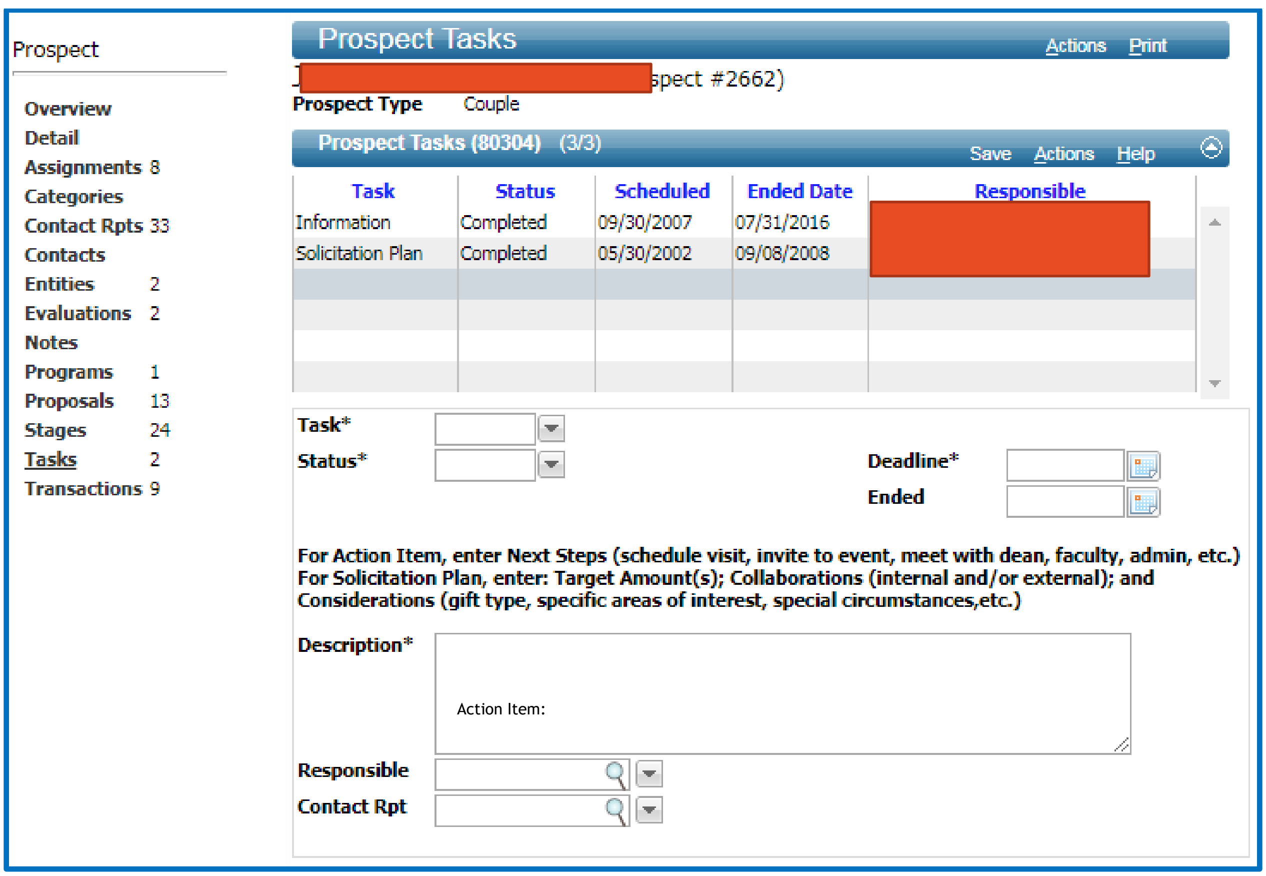


Table of Contents

IF MULTIPLE PEOPLE (i.e. DEAN, FACULTY, etc.) ARE RESPONSIBLE FOR A TASK THEY MUST ALSO BE ASSIGNED TO THE TASK

6. From the Prospect Task screen.
7. Click New in the Tasks Responsible blue bar.

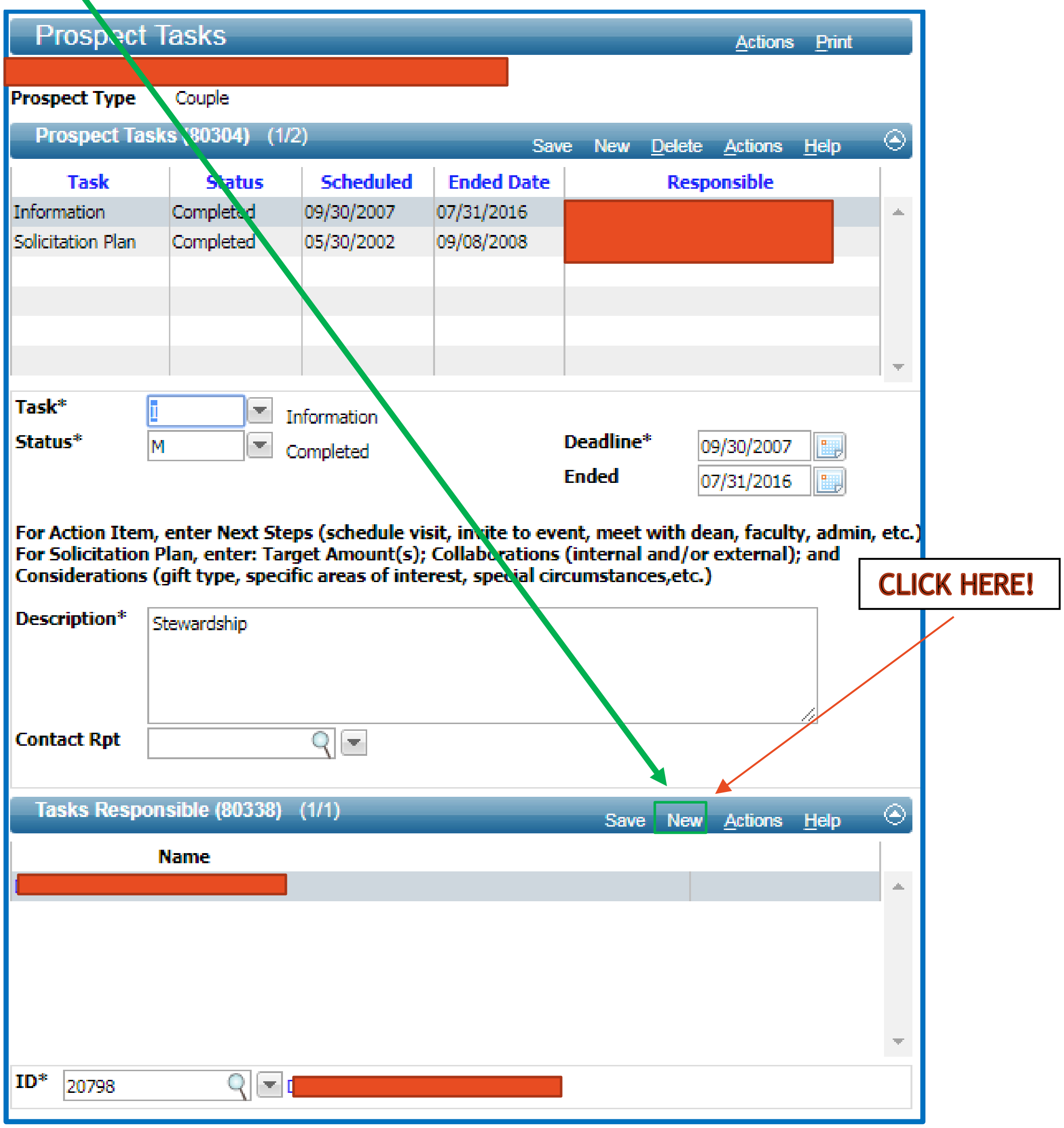
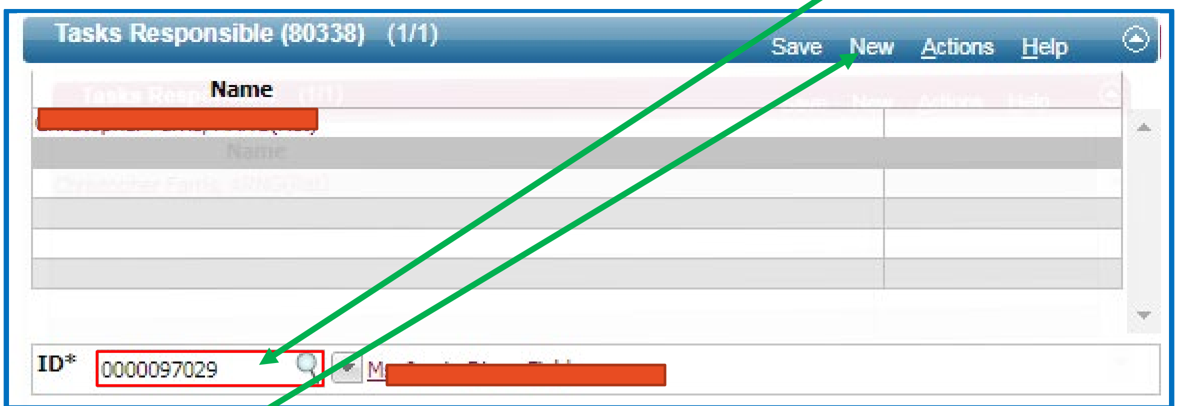


Table of Contents

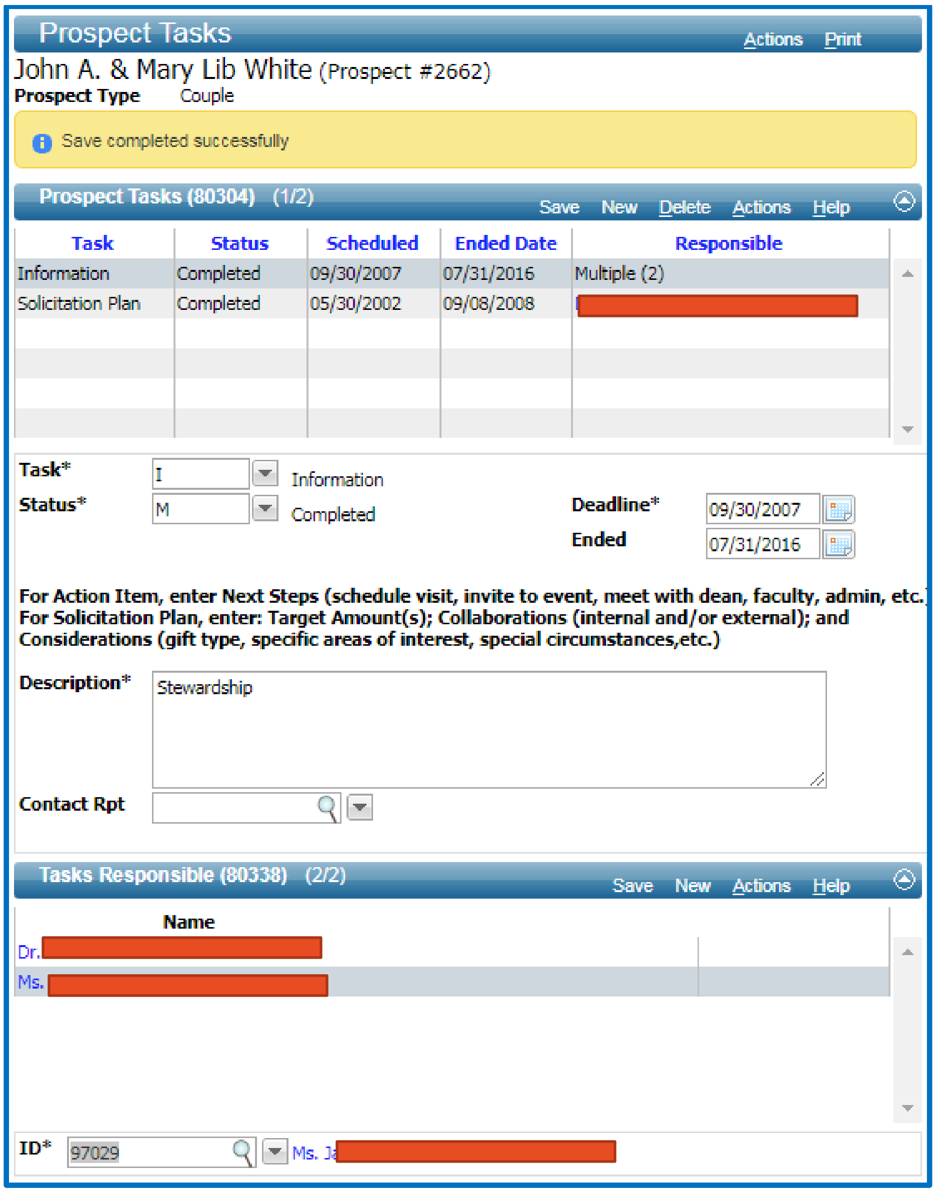
8. Enter additional responsible person's Entity (Advance) ID in the ID* block or use the magnifying glass to look the responsible person up.



9. Click Save in the Tasks Responsible blue bar.

Table of Contents

10. Your **Prospect Tasks** screen should now look something like this:

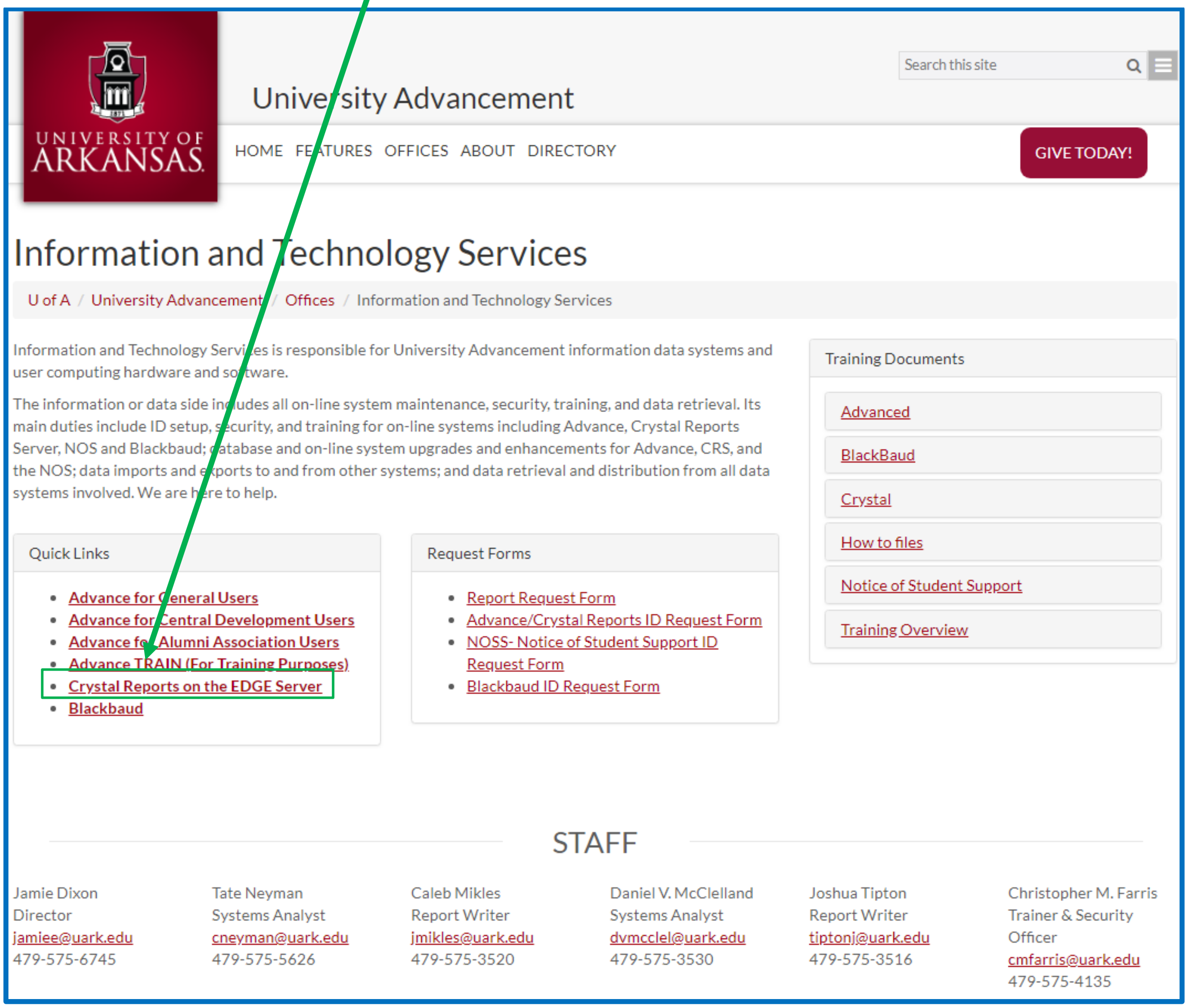


MAKE SURE YOU HAVE SAVED YOUR WORK!

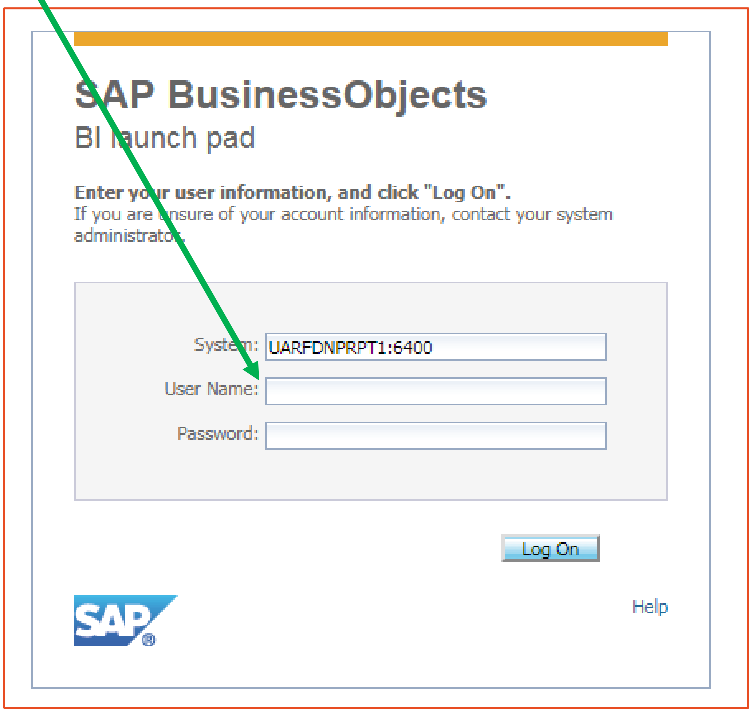
How to Use Crystal Reports

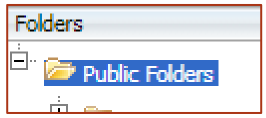
This instruction is for using Crystal reports to: 1. View Existing Reports 2. Run Reports with or without Prompts

1. Open Crystal Reports on the Edge Server from the aits.uark.edu Sharepoint page.



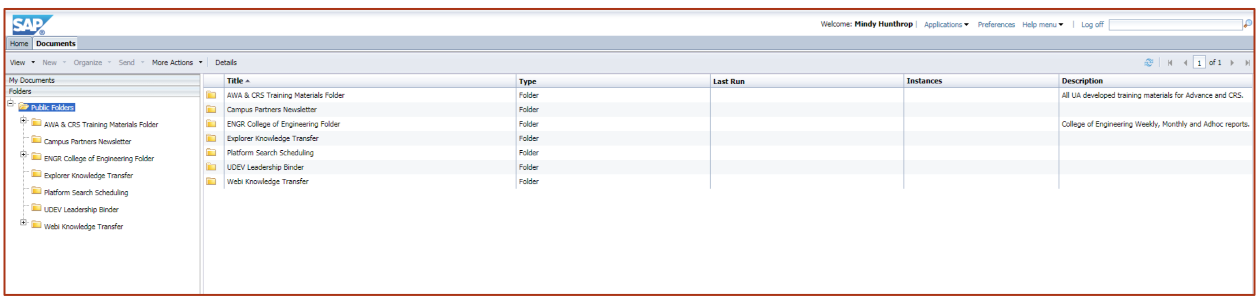
2. Enter your User Name and Password.
   a. User Name = Your email prefix (e.g. cmfarris)
   b. Password = Whatever you have set it to





3. Double-click on **Public Folders**.
4. Your screen should now look “something” like this.

IMPORTANT! EACH USER HAS A DIFFERENT VIEW. NOT ALL USERS CAN VIEW ALL FILES OR FOLDERS. YOUR FOLDER AND THE REPORTS IN IT MAY DIFFER FROM WHAT IS SHOWN IN THIS HOW-TO. THE PROCEDURES, HOWEVER, ARE THE SAME FOR EVERY REPORT.

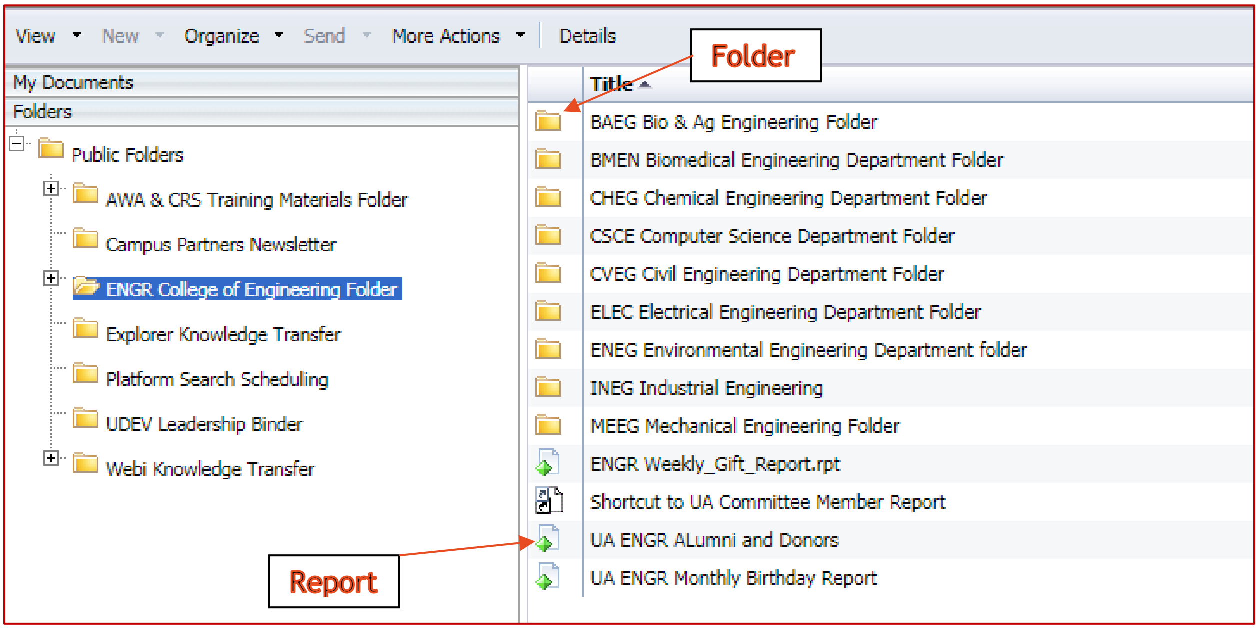


TIP

These are the folders that are available to you as a user. Inside of these folders you will find reports custom-designed for your department.

- Reports are placed in these folders by the AITS team.
- You can request custom reports at aits.uark.edu.
- **Always** request a report if you are going to be contacting entities in Advance! Never create your own reports out of Advance, it’s DANGEROUS.
- Reports that are used repeatedly are candidates for permanent residency in Crystal.

5. Select your unit folder. In this example ENGR College of Engineering.



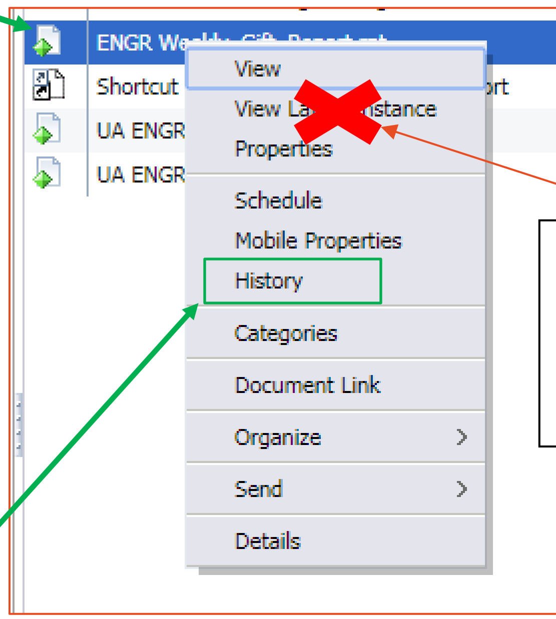
The folder icons mean that there are more folders or reports inside. 

The small paper icon with a green diamond is a report. 

FOR THIS HOW-TO WE WILL USE THE ENGR Weekly_Gift_Report.rpt as an example.

TO VIEW AN EXISTING REPORT

1. Right-click on the report name. A list of options will appear.

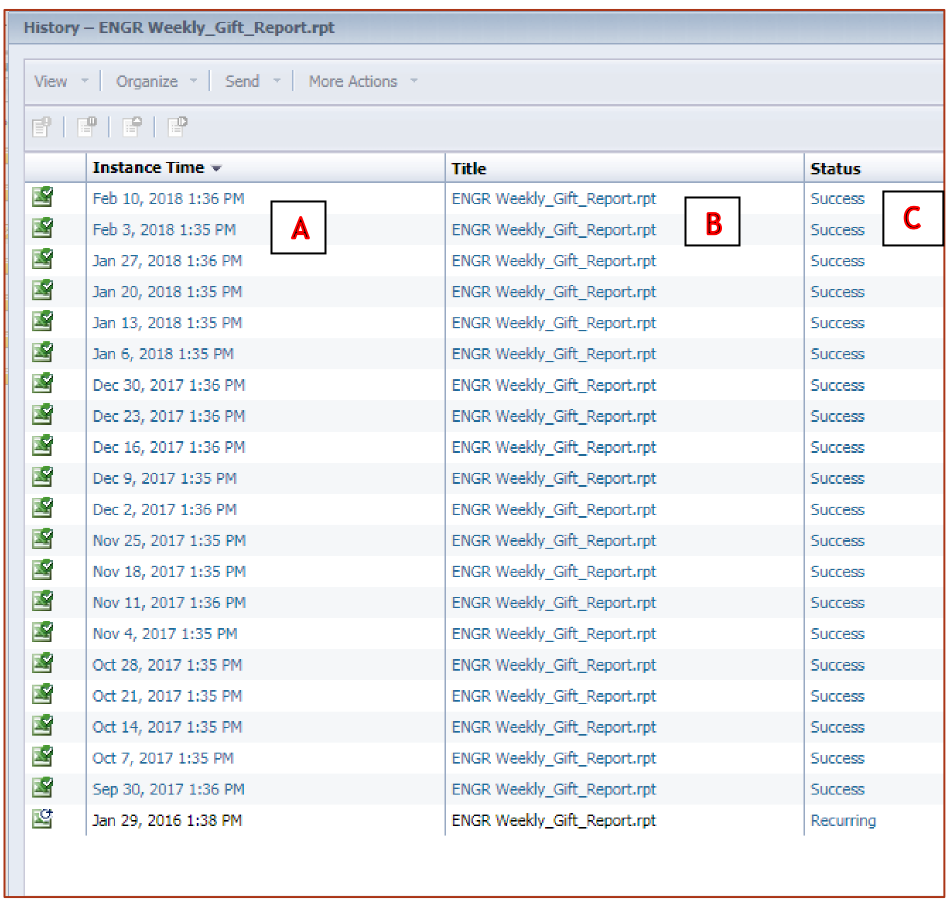


View Latest Instance is NOT a good idea. If your last report failed to run you will just get a copy of an older inaccurate report.

2. Select History as you see in the above illustration.

3. This will show you a list of the previous times that this report has been run.
4. History contains (see graphics below):
    A. **Instance Time** - Date that the report was last run.
    B. **Title** – Name of the report.
    C. **Status** – Look for Success or Failure. If you see **Recurring** this is a report that is set to run on a pre-set schedule. Always look at **Success** reports for valid information.
    D. **Created by** – The person that ran the report.
    E. **Type** – Type of report (i.e. Microsoft Excel or PDF)
    F. **Parameters** – These are the settings that can be changed to make a report show different information. This field shows you which settings were in place when the report was run.

All reports are stack-ranked by date. Newest to oldest.


History – ENGR Weekly_Gift_Report.rpt

View | Organize | Send | More Actions

Instance Time	Title	Status
Feb 10, 2018 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
Feb 3, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Jan 27, 2018 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
Jan 20, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Jan 13, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Jan 6, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Dec 30, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
Dec 23, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
Dec 16, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
Dec 9, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Dec 2, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
Nov 25, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Nov 18, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Nov 11, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
Nov 4, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Oct 28, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Oct 21, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Oct 14, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Oct 7, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
Sep 30, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
Jan 29, 2016 1:38 PM	ENGR Weekly_Gift_Report.rpt	Recurring

Table of Contents

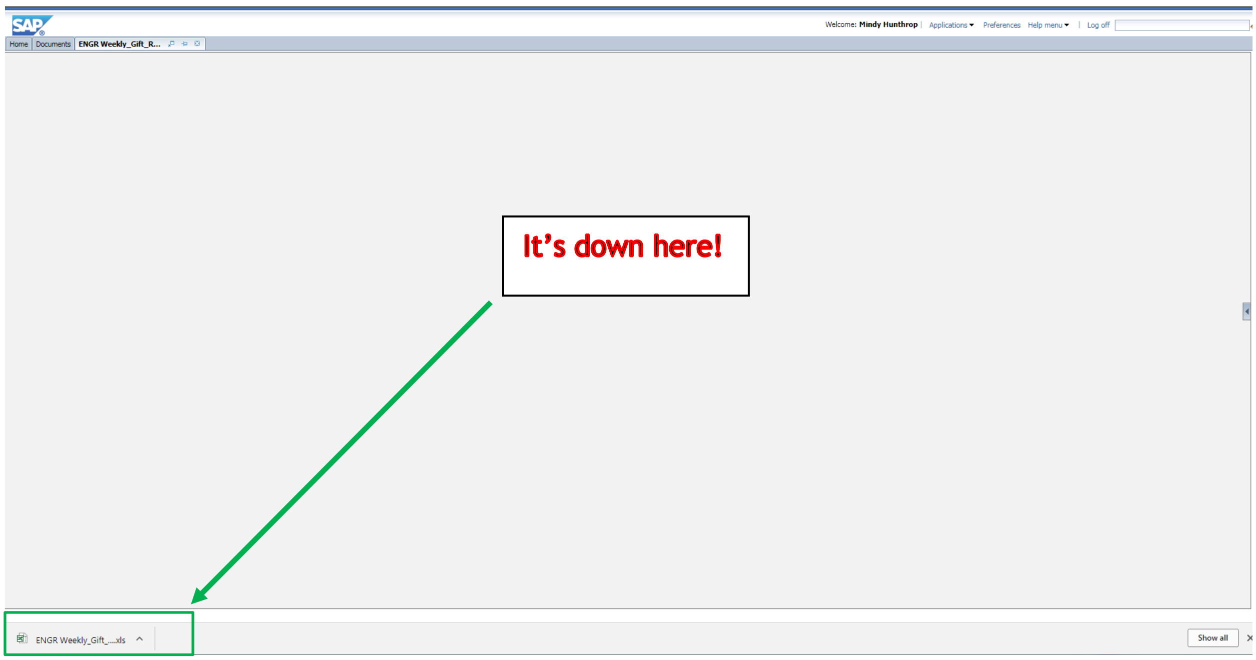
Created By	Type	Locale	Parameters
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 21; null; null;
Administrator D	Microsoft Excel E		null; null; 2 F ; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;

5. Choose the report you wish to view and left-click on its title.

Title
ENGR Weekly_Gift_Report.rpt
ENGR Weekly_Gift_Report.rpt
ENGR Weekly_Gift_Report.rpt
ENGR Weekly_Gift_Report.rpt
ENGR Weekly_Gift_Report.rpt

Click Here!

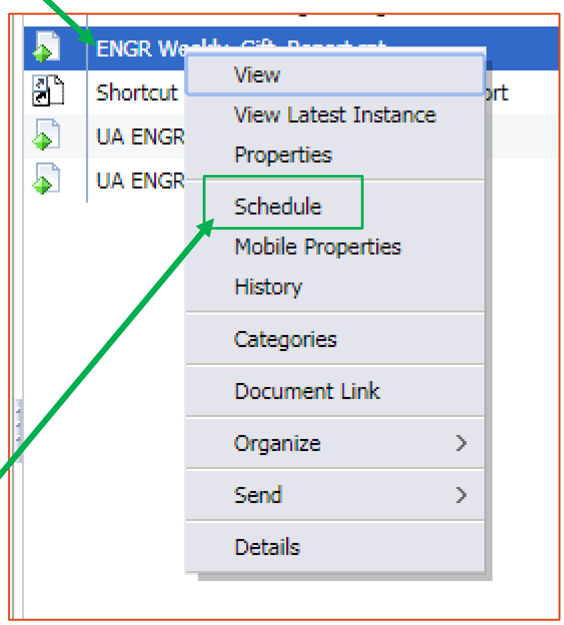
6. Your file has now been opened on the bottom-left corner of your screen. You may open it by clicking on it. (See below)



How to Run an Existing Report with (or without) Changed Parameters

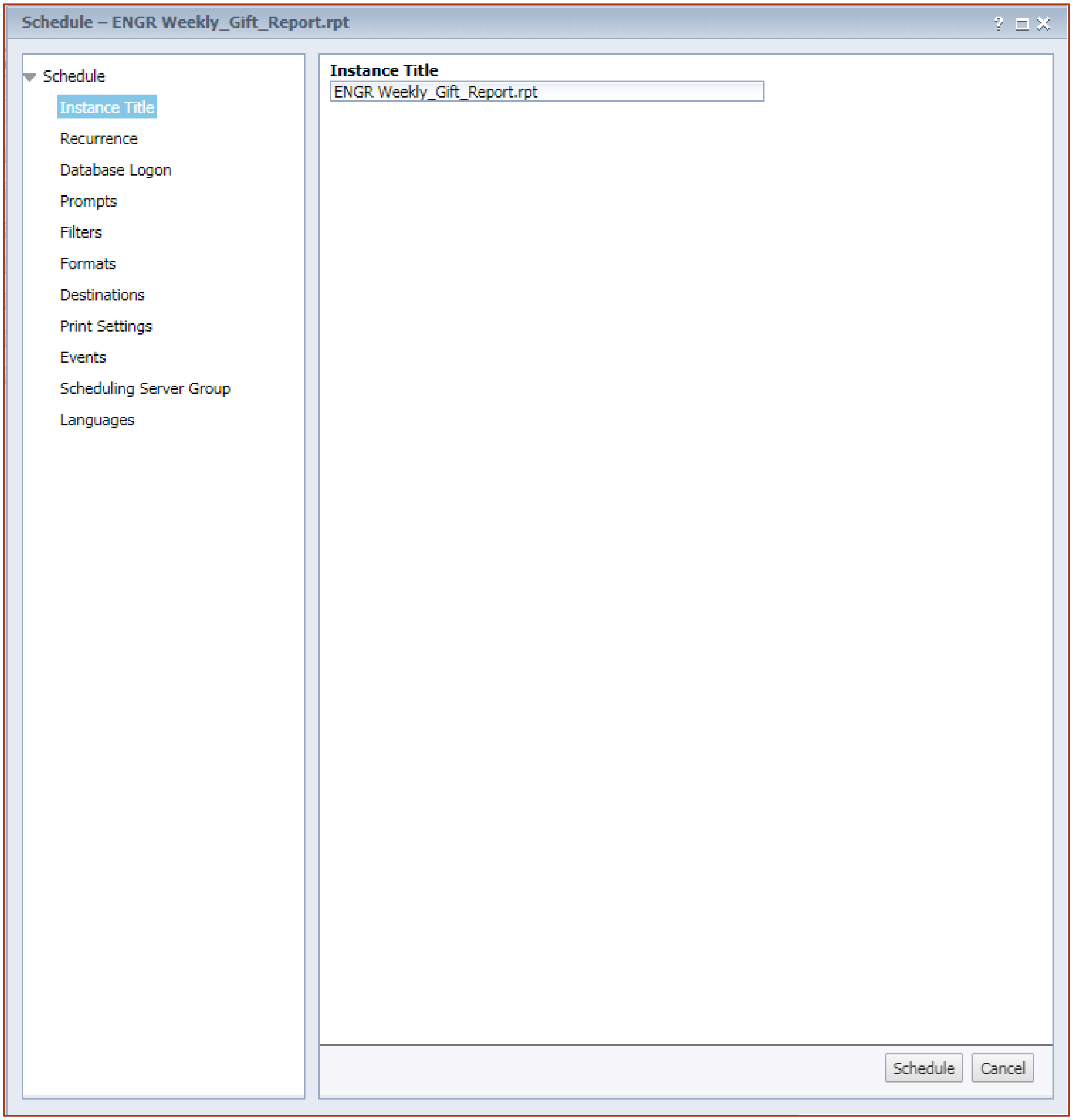
1. Right-click on the report name. A list of options will appear.

ONLY RUN A NEW REPORT IF YOU NEED CURRENT DATA OR YOU NEED TO CHANGE HOW A REPORT IS RUN (ITS PARAMETERS)



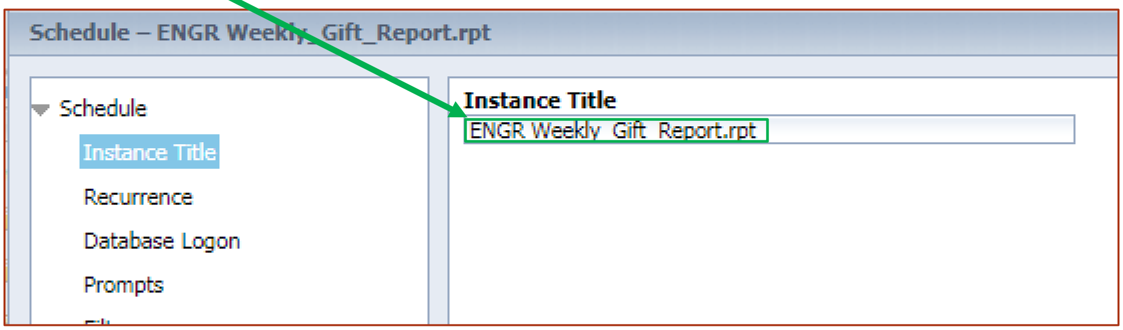
2. Left-click on Schedule.

3. This will open your Schedule screen. It will look like this:

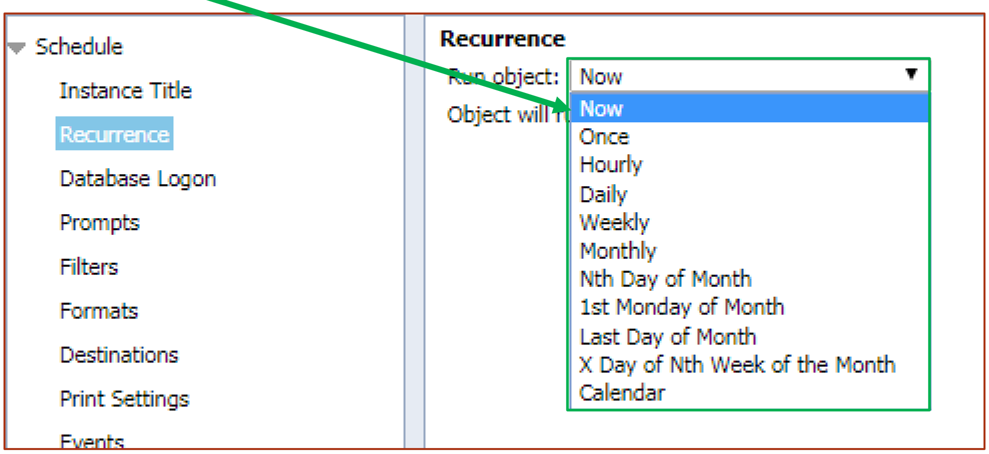


4. **Instance Title** - You may change the Title of the Report for this run only.

THIS IS NOT A REQUIRED STEP. IT IS OPTIONAL.



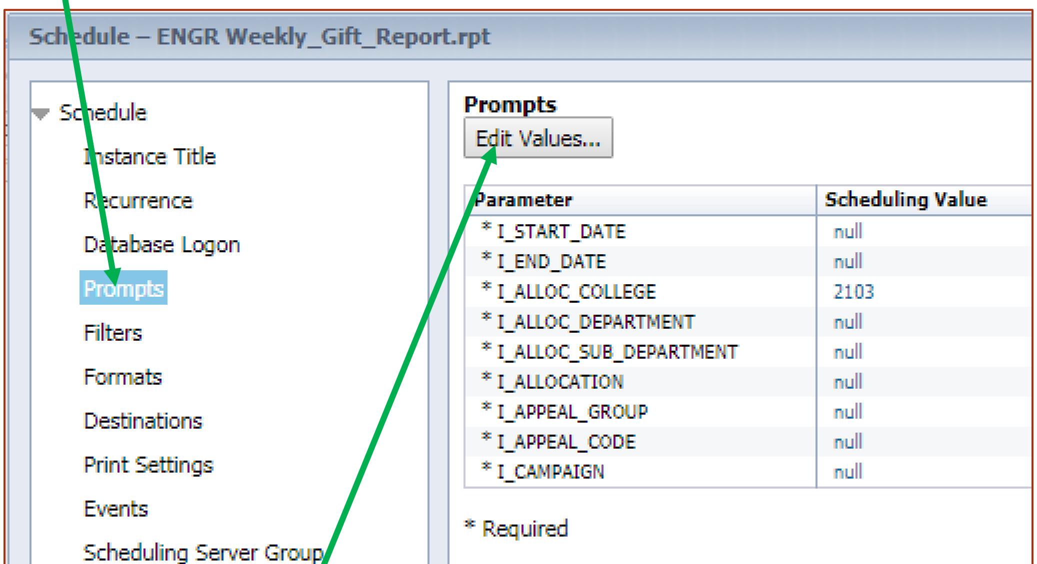
5. **Recurrence** - This will let you set up the report to run multiple times. You have multiple options as you can see below:



IF YOU ONLY NEED THE REPORT TO RUN ONCE AND RIGHT NOW SELECT NOW!

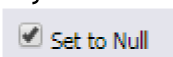
6. **Prompts** - Allows you to change the parameters of the report. This is how you change what information the report will display.

THIS IS NOT A REQUIRED STEP. IT IS OPTIONAL.

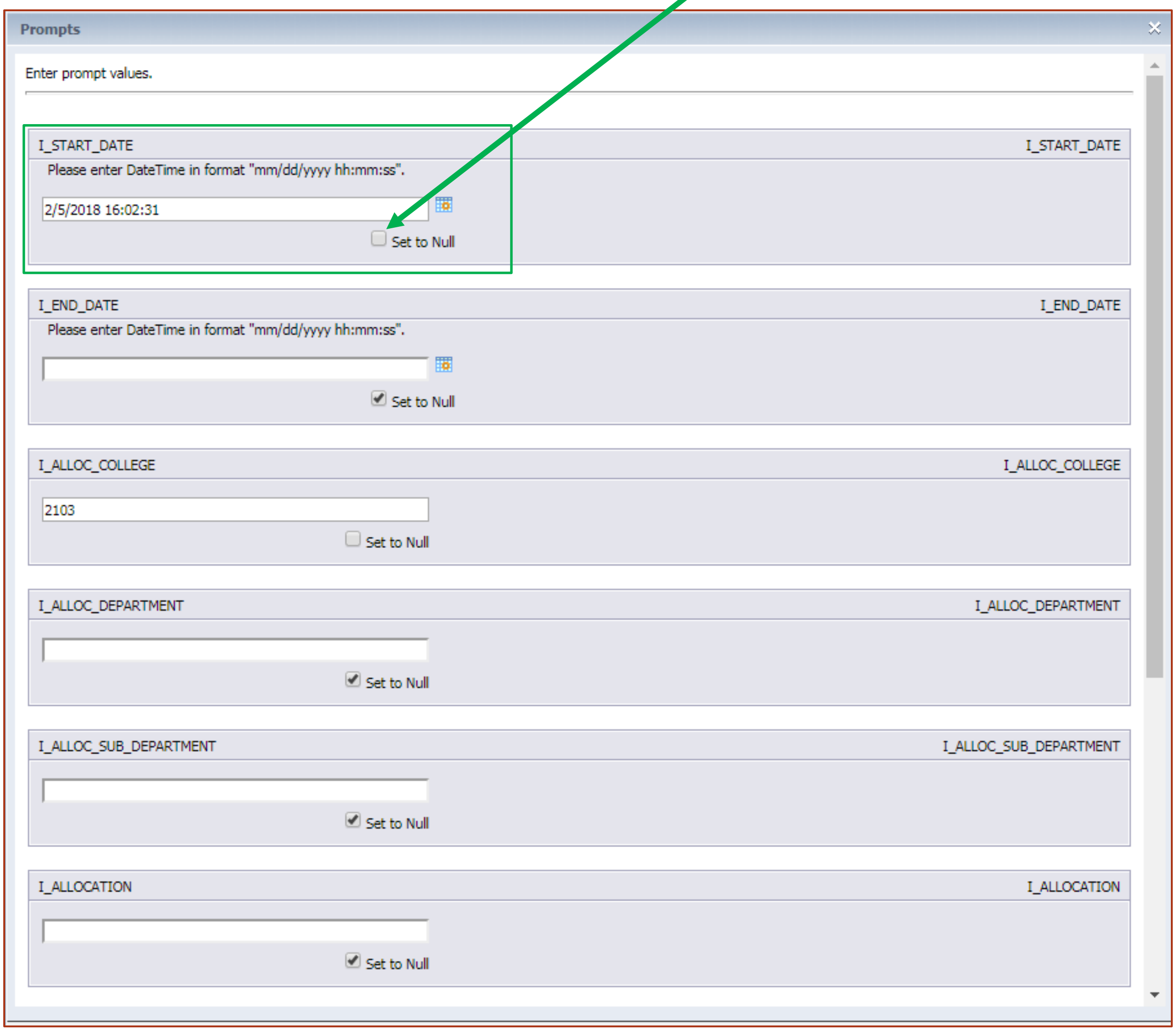


*THIS REPORT HAS MULTIPLE PARAMETERS THAT CAN BE CHANGED. NOT ALL REPORTS HAVE THIS MANY PARAMETERS. SOME HAVE **NO** PARAMETERS AT ALL!*

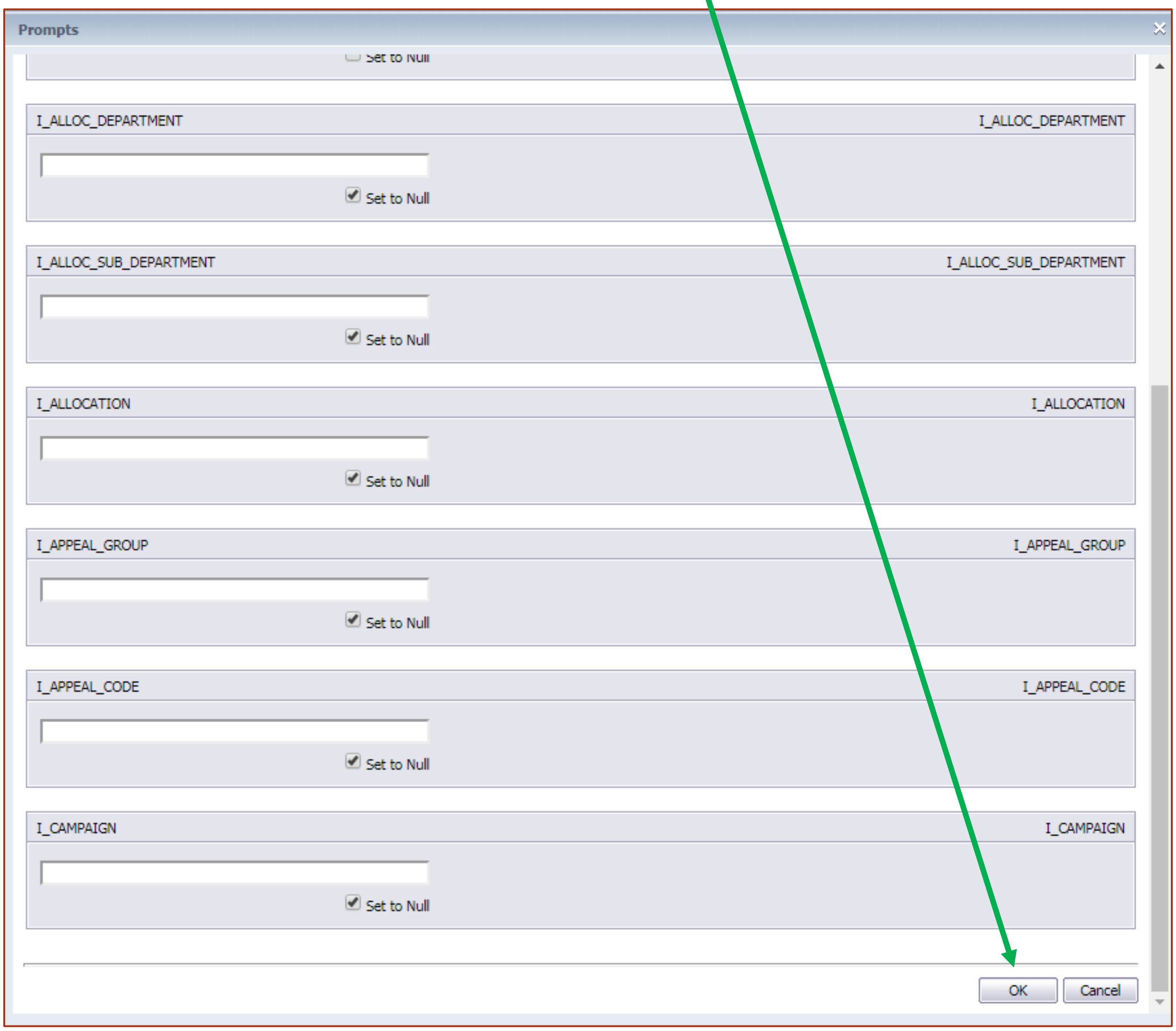
7. Click **Edit Values...** button to make changes to the report parameters.

8. If you want to change a parameter remove the check mark by Set to Null 

and change the information in the text box. Sometimes these have drop down boxes or calendar tools, sometimes they require the user to enter text directly into the box. (In the below example I have set a start date of February 5 and 4:02:31 PM.)

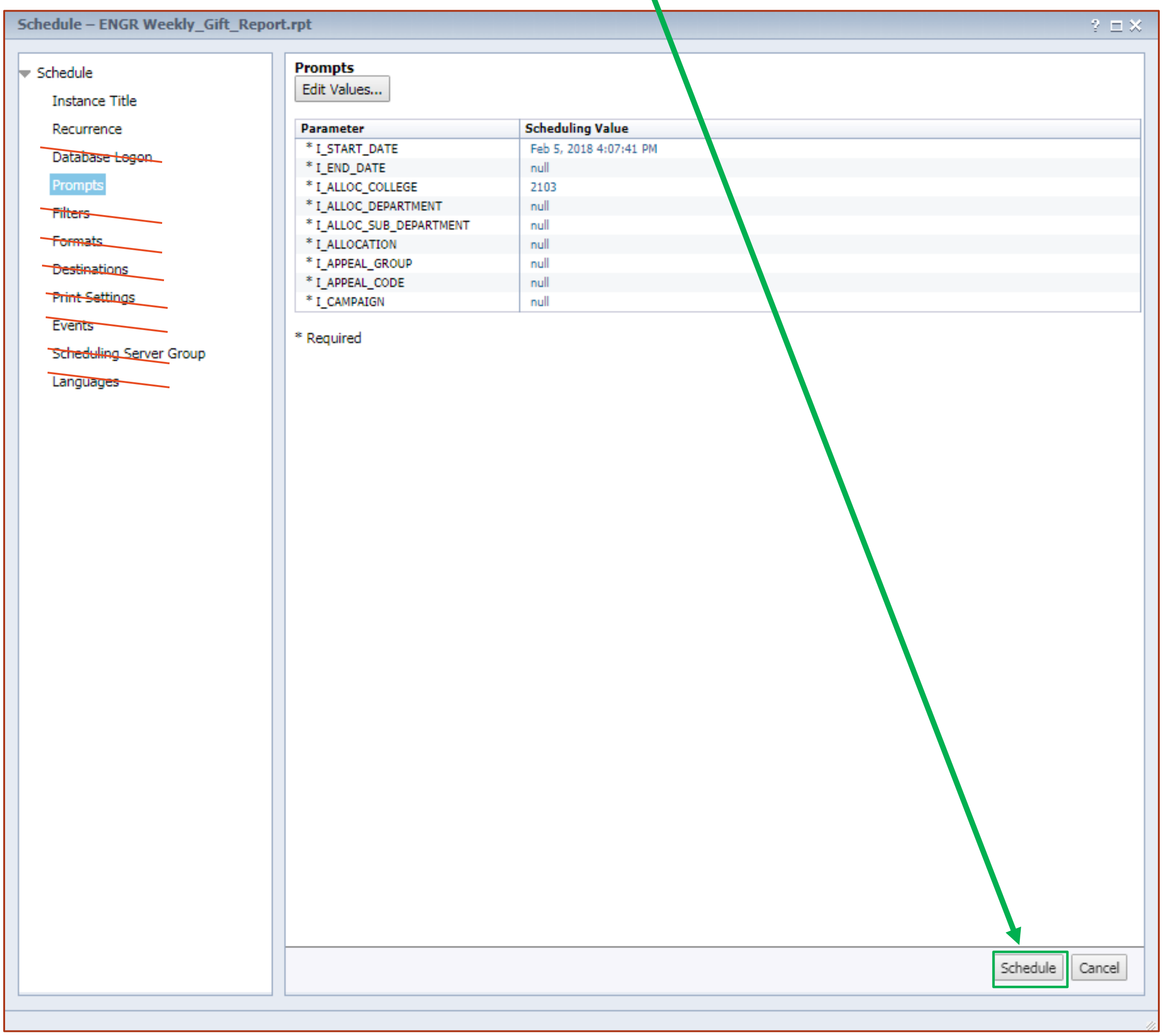


9. When your parameters are all set the way you like (YOU CAN SET MORE THAN ONE ON THE SAME PAGE!)…
10. Scroll to the bottom of the box and choose the OK button. 

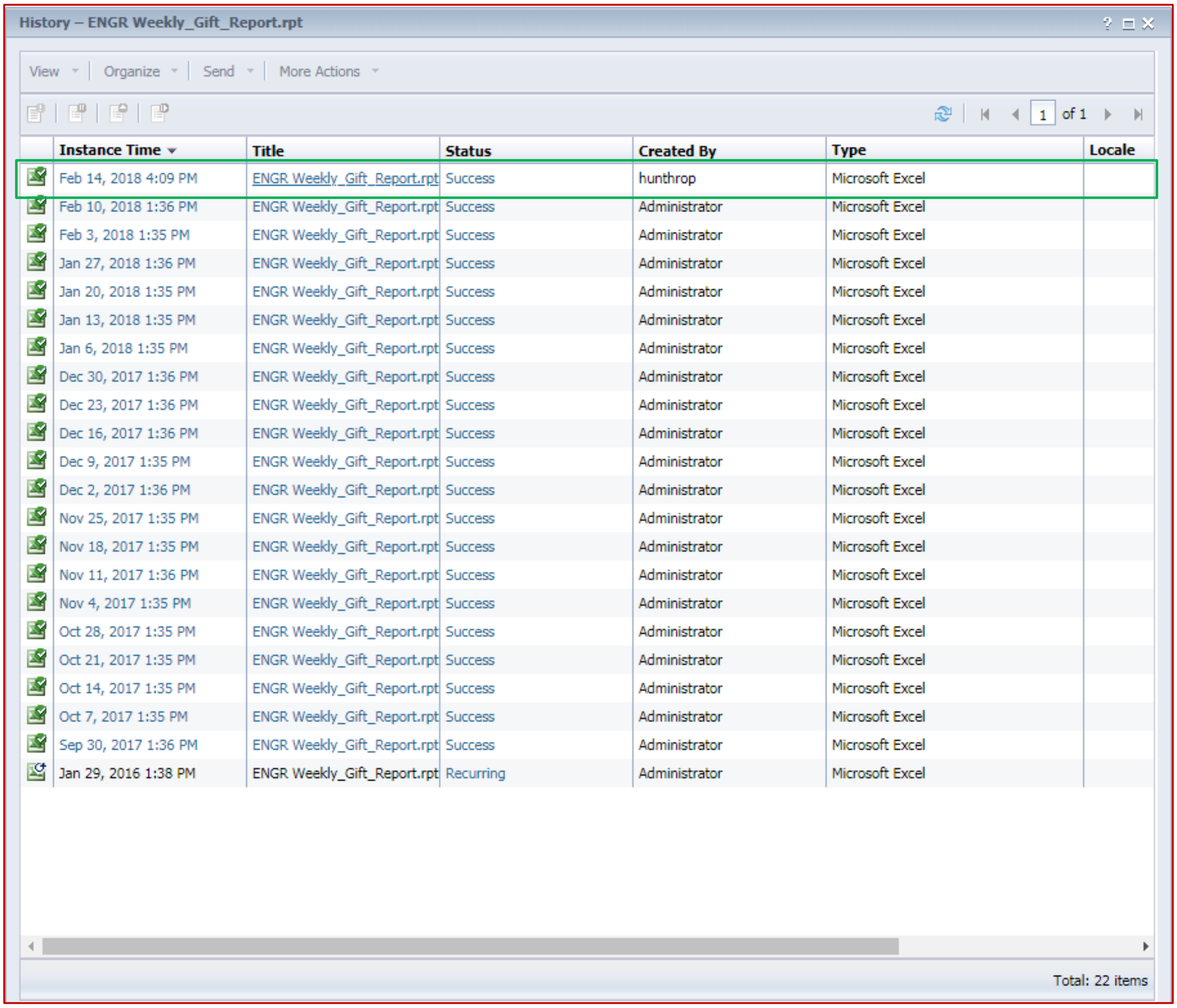


11. Start the report by left-clicking the **Schedule** button in the bottom right-hand corner of the screen.

IGNORE ALL OTHER OPTIONS!

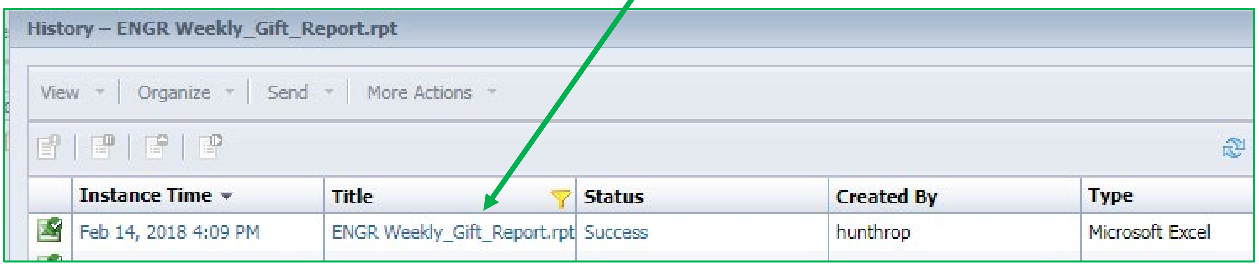


12. This will cause your **History** page to open again.
13. You will see your report running at the top of the screen.
14. This is what it will look like when it is finished:

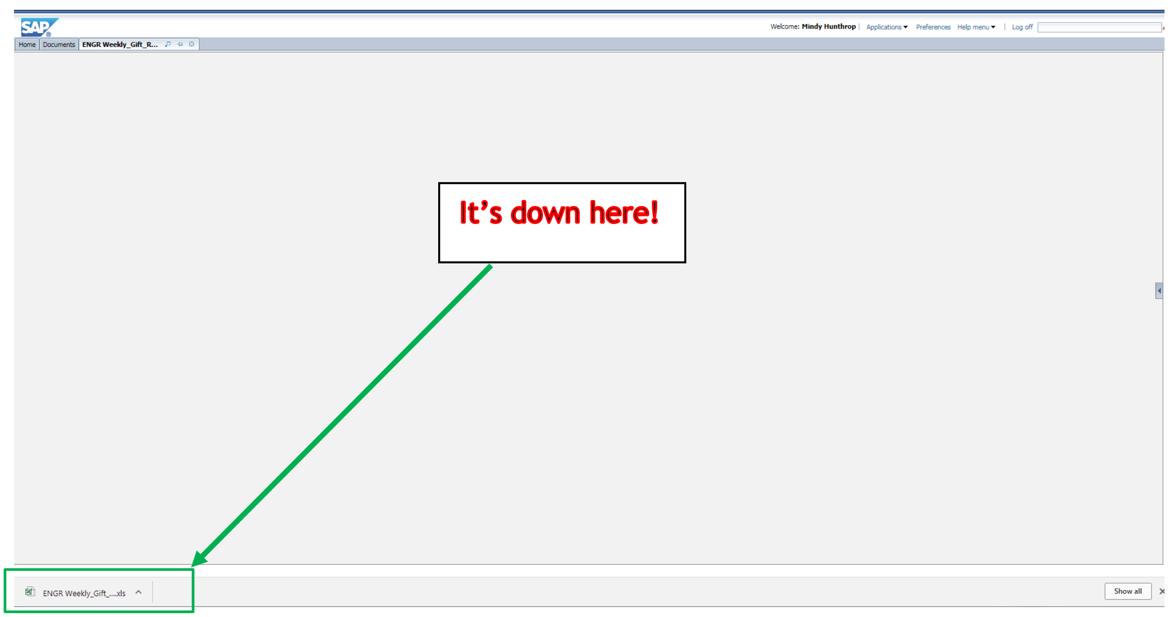


Instance Time	Title	Status	Created By	Type	Locale
Feb 14, 2018 4:09 PM	ENGR Weekly_Gift_Report.rpt	Success	hunthrop	Microsoft Excel	
Feb 10, 2018 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Feb 3, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 27, 2018 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 20, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 13, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 6, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Dec 30, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Dec 23, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Dec 16, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Dec 9, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Dec 2, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Nov 25, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Nov 18, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Nov 11, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Nov 4, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Oct 28, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Oct 21, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Oct 14, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Oct 7, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Sep 30, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 29, 2016 1:38 PM	ENGR Weekly_Gift_Report.rpt	Recurring	Administrator	Microsoft Excel	

15. Choose the report you JUST RAN and left-click on its title.



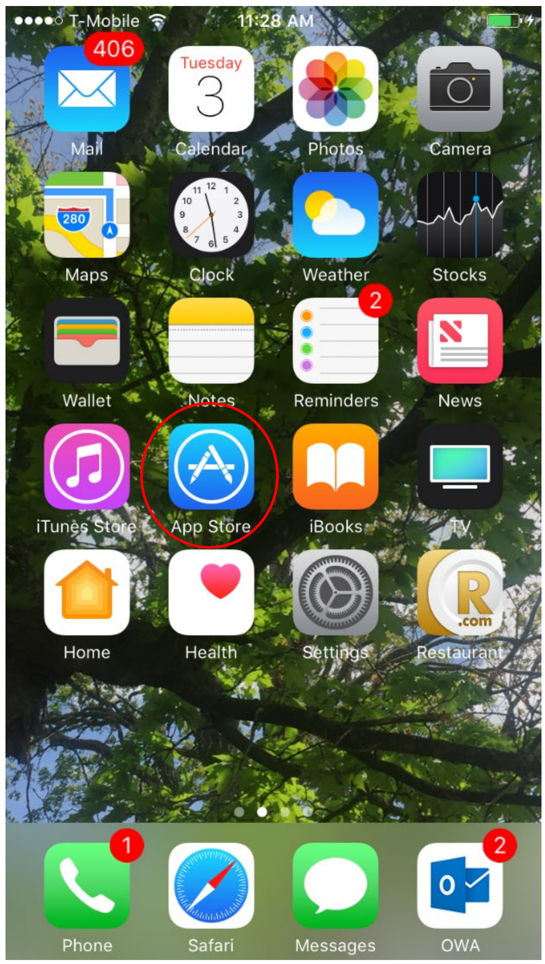
1. Your file has now been opened on the bottom-left corner of your screen. You may open it by clicking on it. (See below)



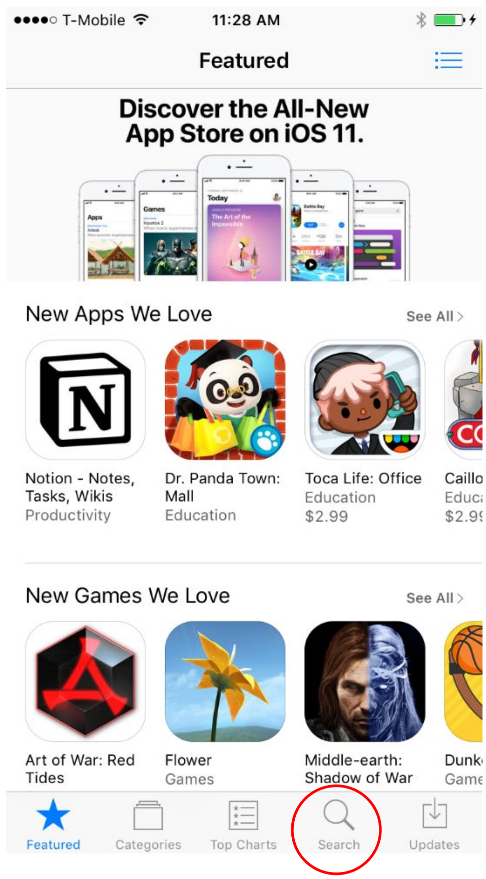
How to One-Drive from Handheld

University of Arkansas IT Department instructions for installing support software for iOS and Android can be found at: https://its.uark.edu/help/ta/371.php

1. Choose **App Store**.

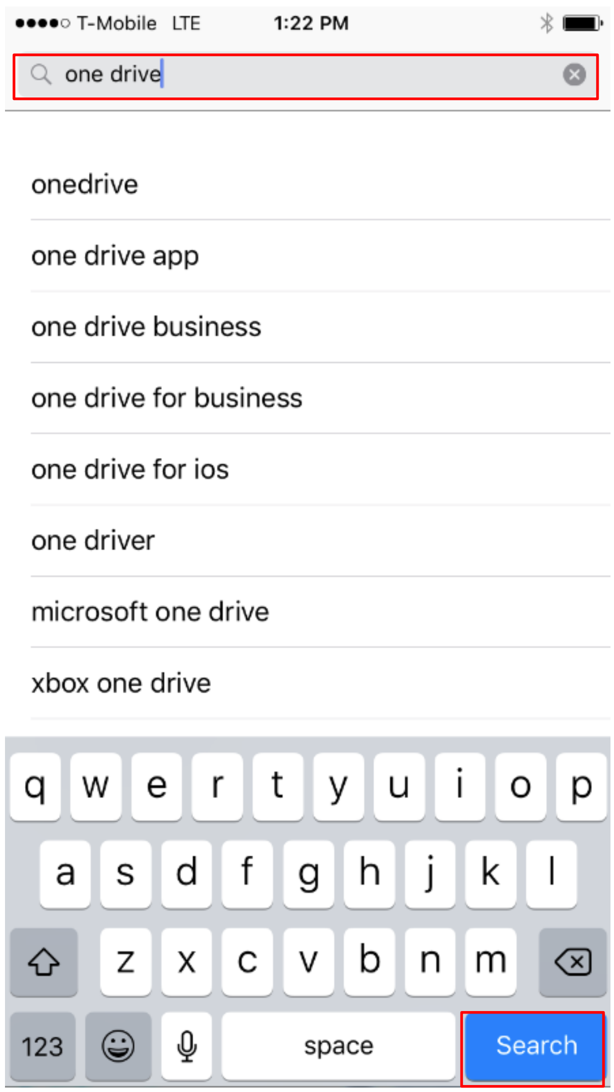


2. Choose the Magnifying Glass for **Search**.

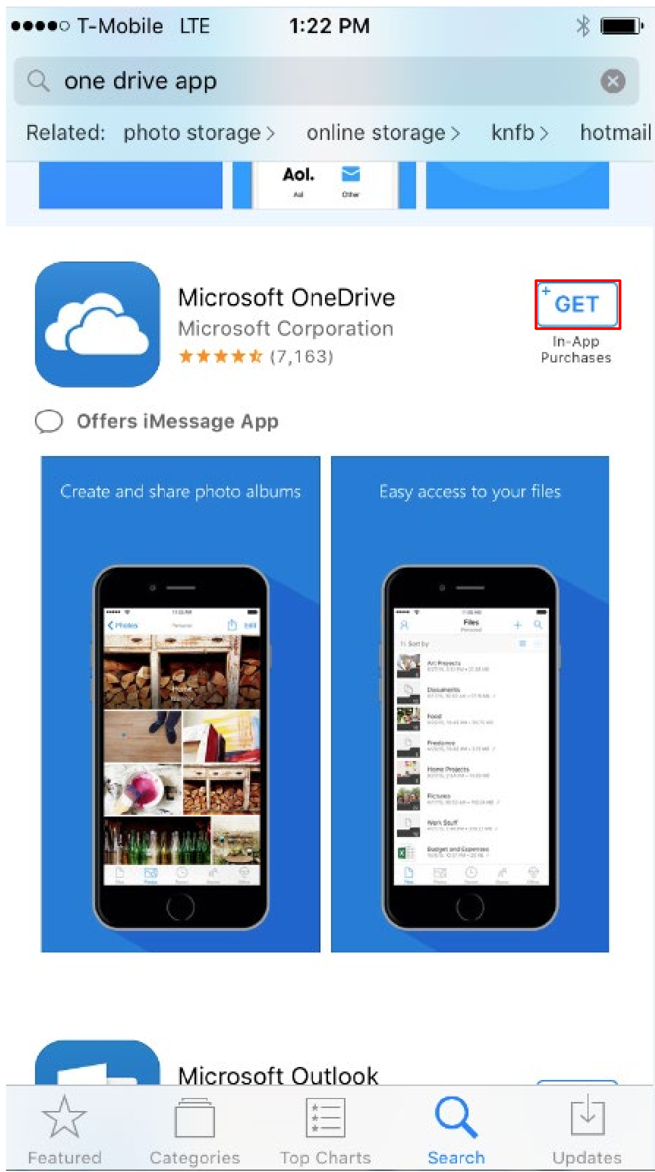


3. Type one drive in the Search bar and press 

.

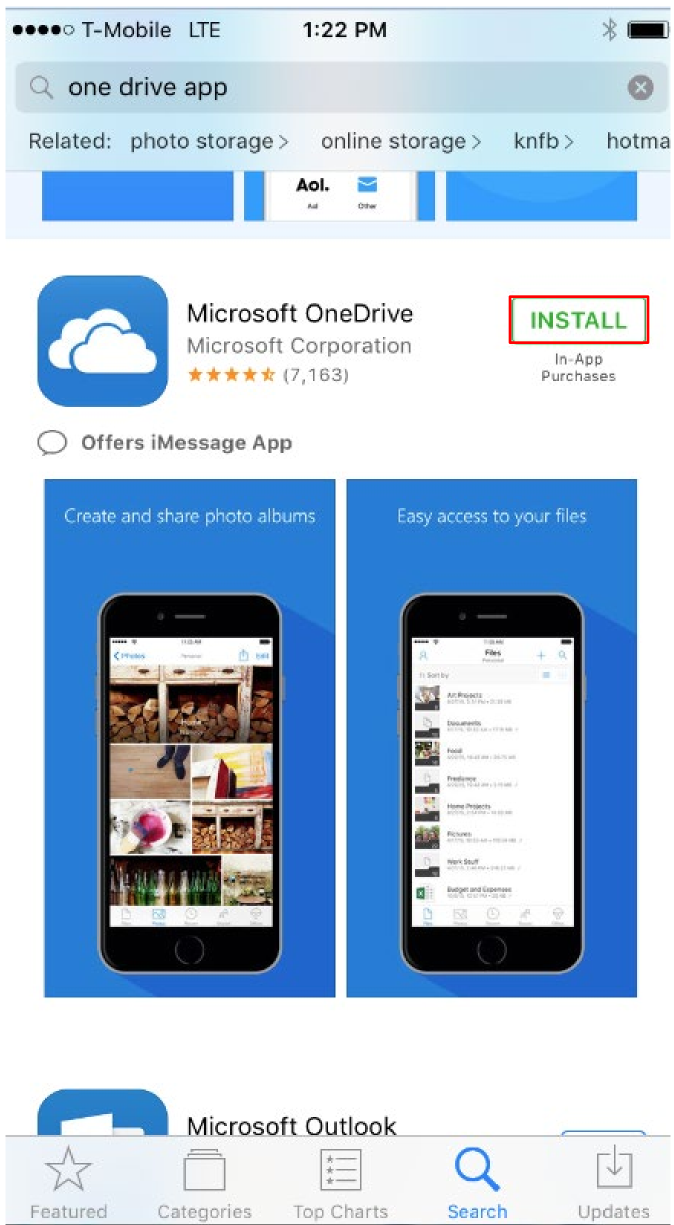


4. Find the Microsoft OneDrive app.
5. Press .



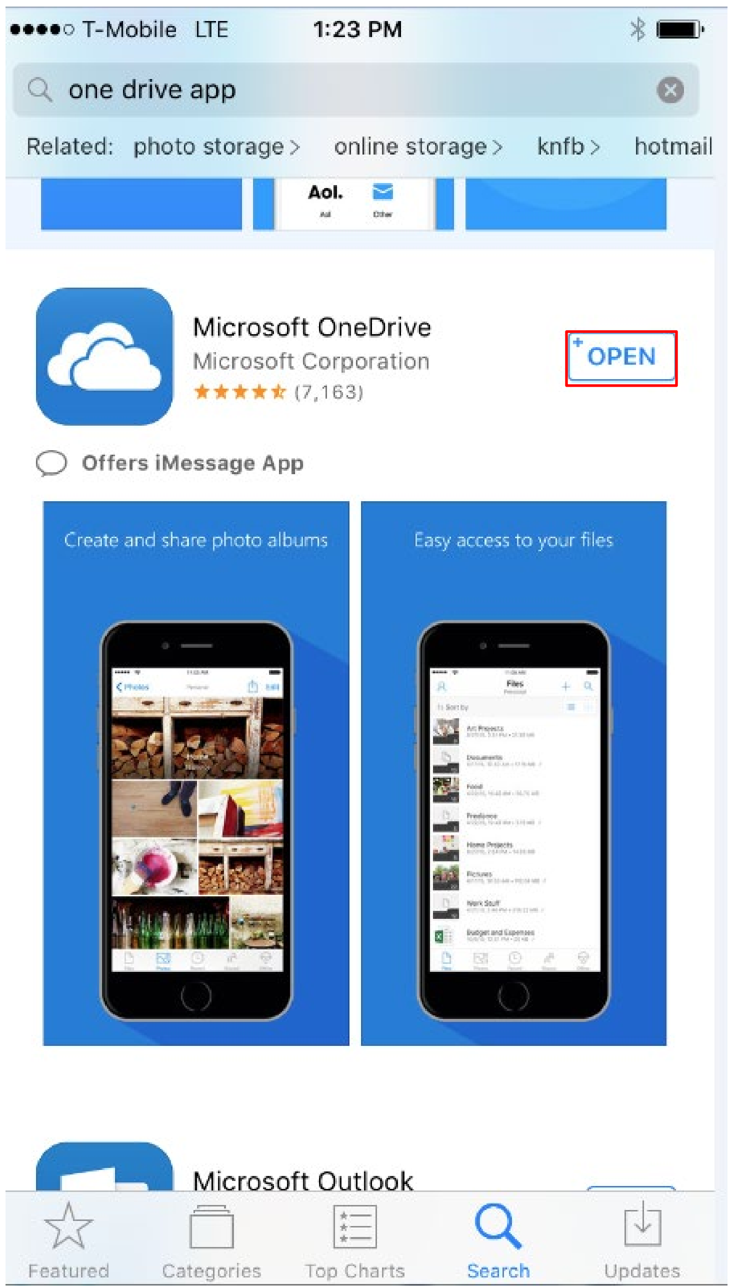
6. Wait for download.
7. Press 

.



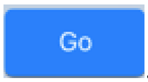
8. Press 

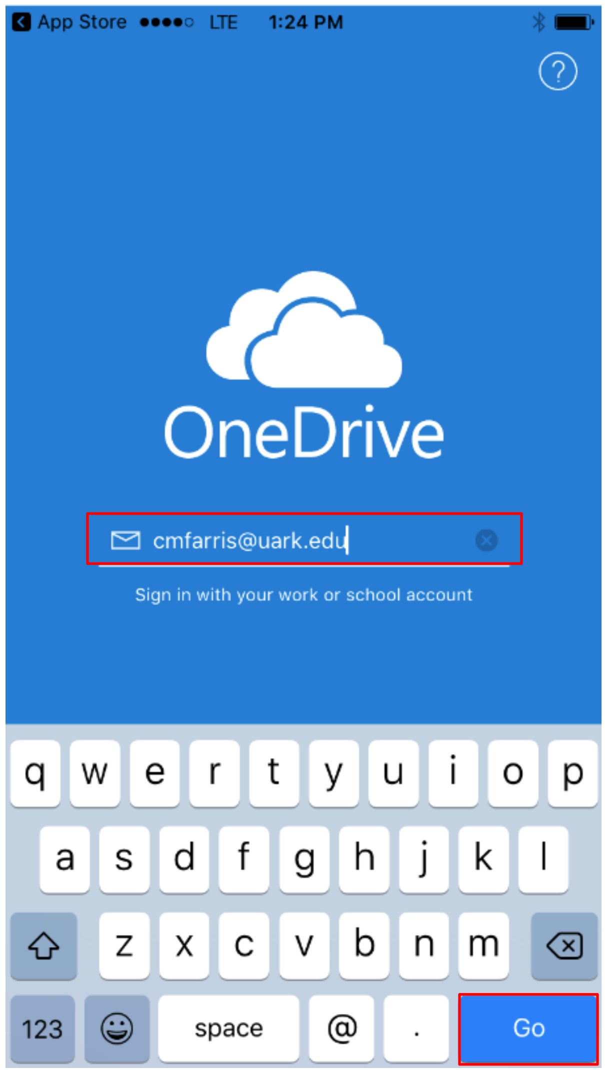
.



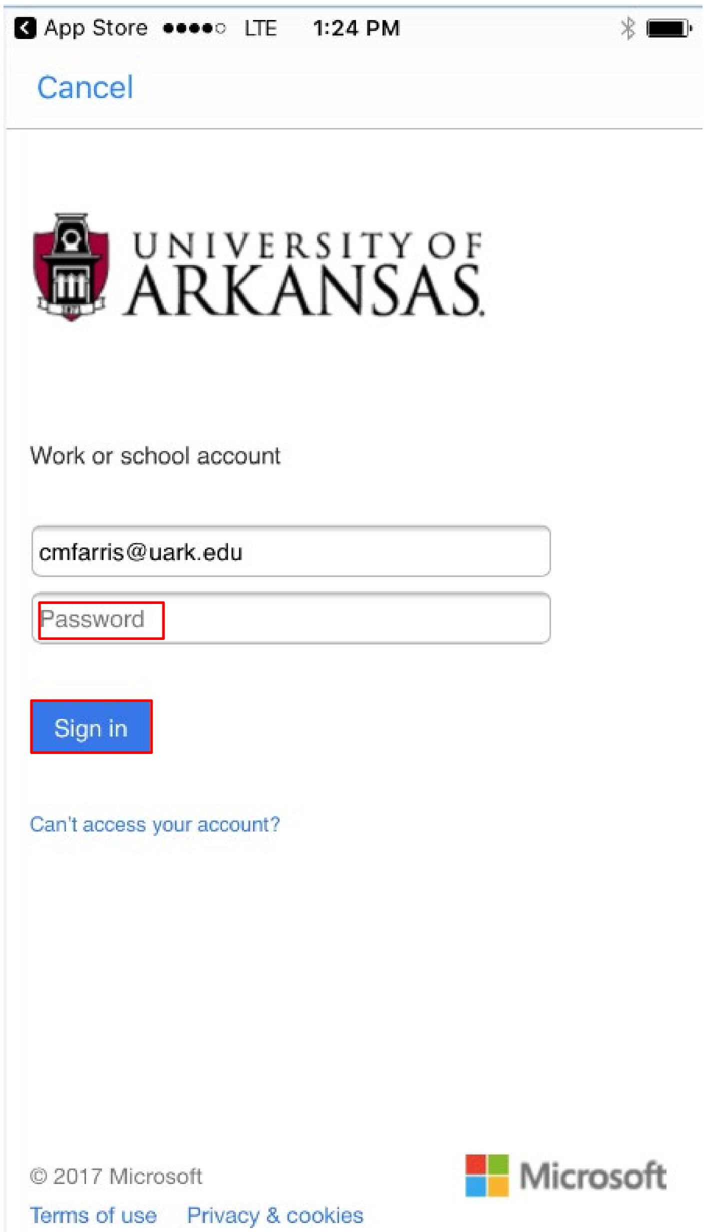
9. OneDrive will begin to load.

10. Enter your UARK email address.

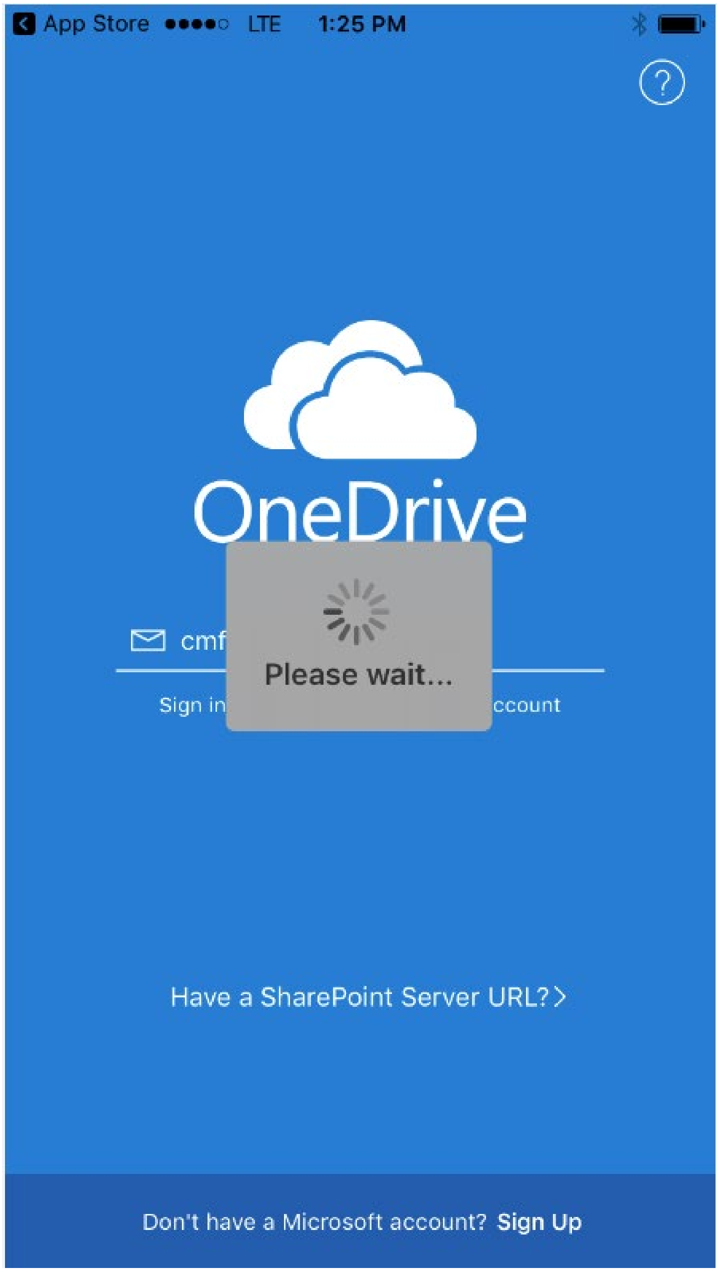
11. Press 
Go
.


App Store
LTE
1:24 PM
OneDrive
cmfarris@uark.edu
Sign in with your work or school account
q w e r t y u i o p
a s d f g h j k l
z x c v b n m
123
space
@
.
Go

12. Enter your UARK password.
13. Press .



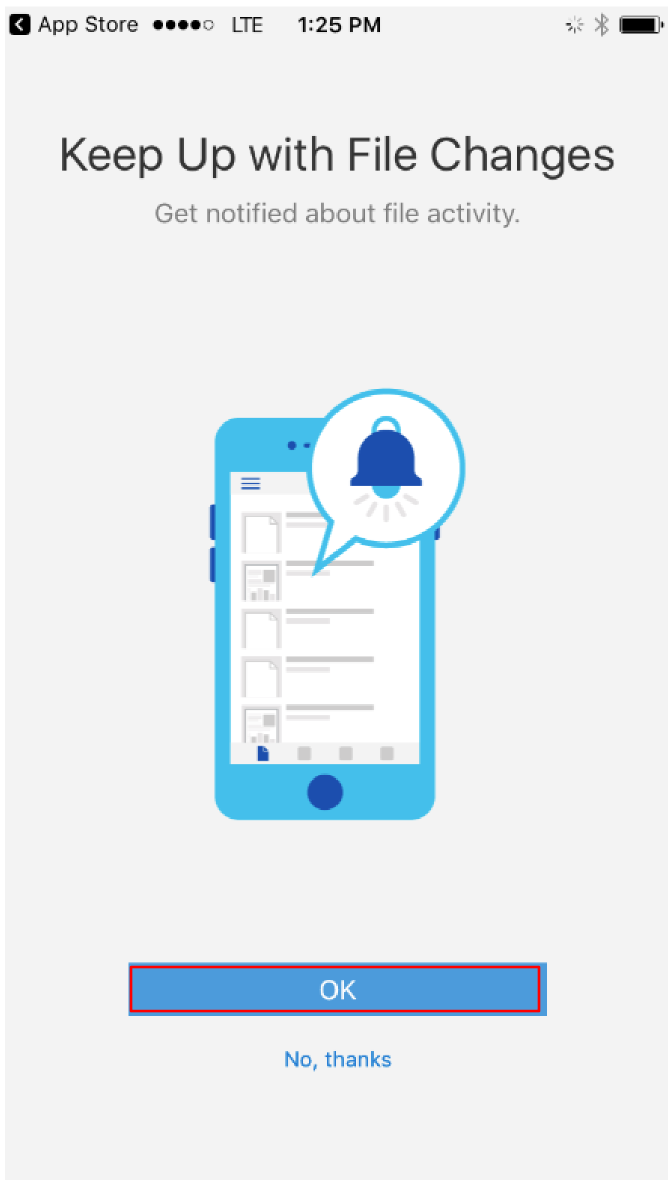
14. OneDrive will contact the University's Server.


App Store
LTE
1:25 PM
OneDrive
cmf
Please wait...
Sign in
ccount
Have a SharePoint Server URL?
Don't have a Microsoft account? Sign Up

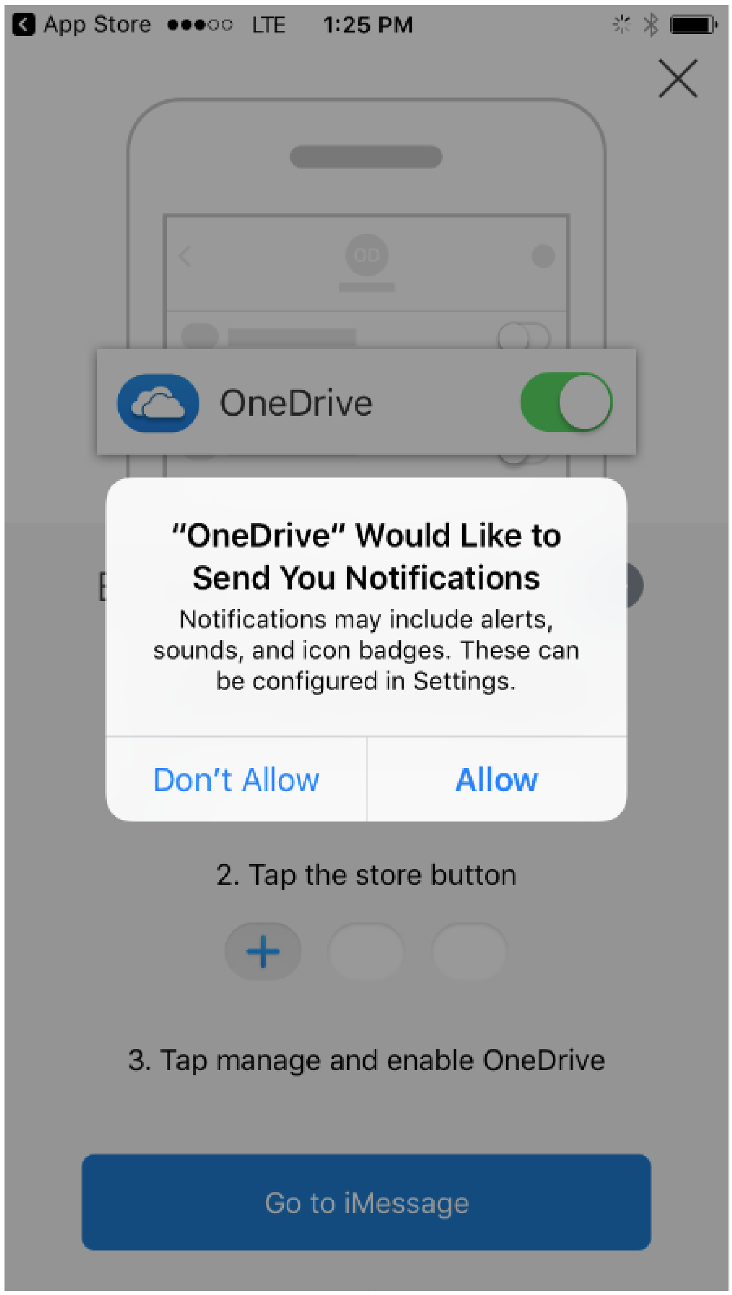
15. OneDrive will ask to notify you of File Changes.

16. Select 

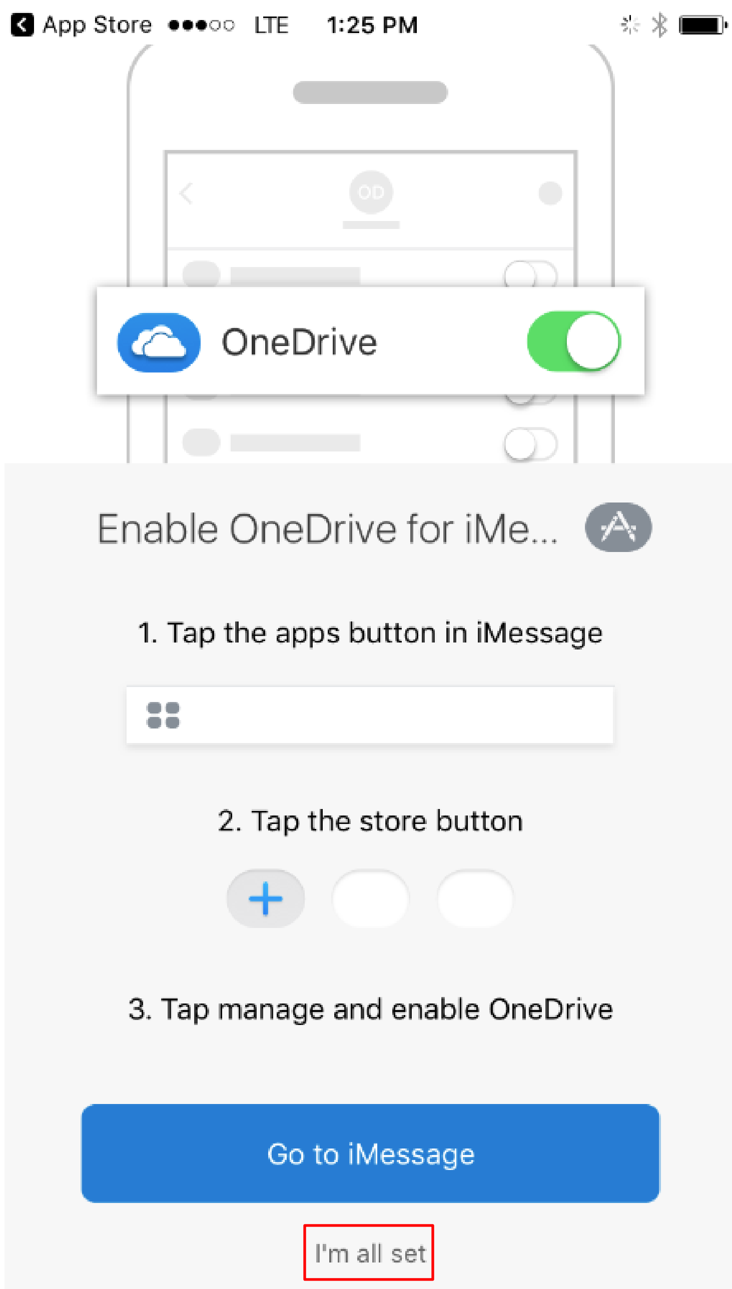
.



17. OneDrive will ask to send you notifications. This is up to the individual.



18. OneDrive will ask to Enable OneDrive for iMessage. I chose "I'm all Set." This is up to the individual.



19. All OneDrive files are now available on your mobile device.

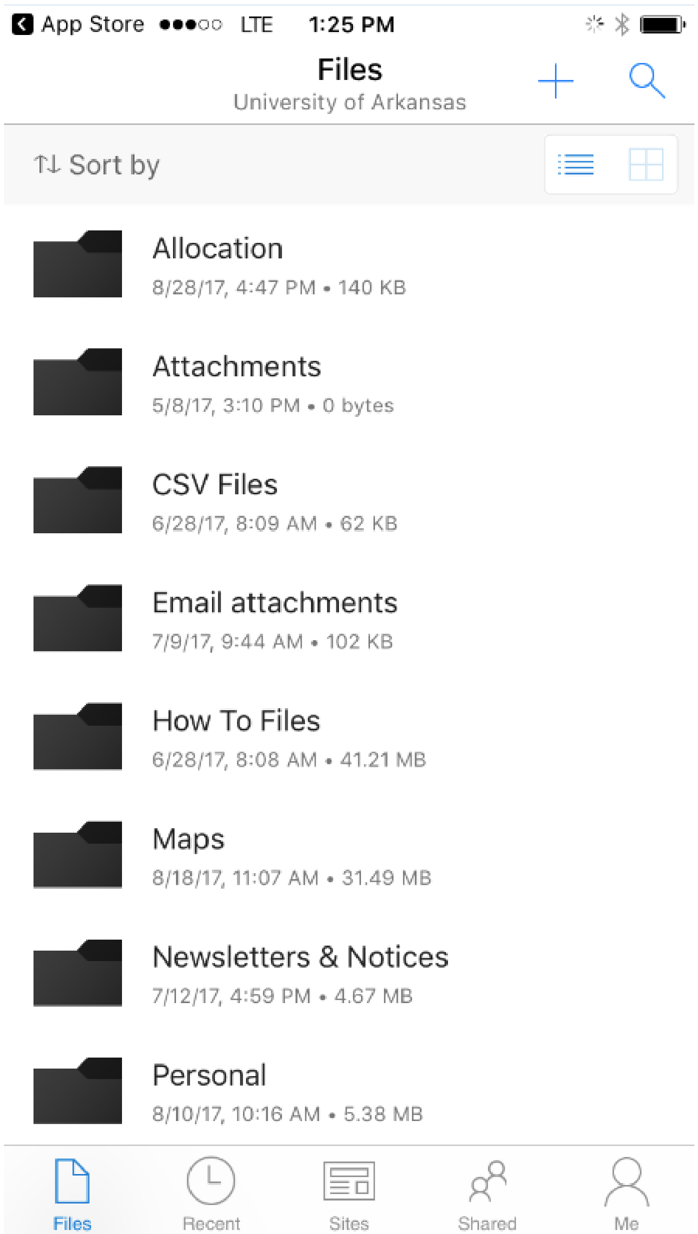
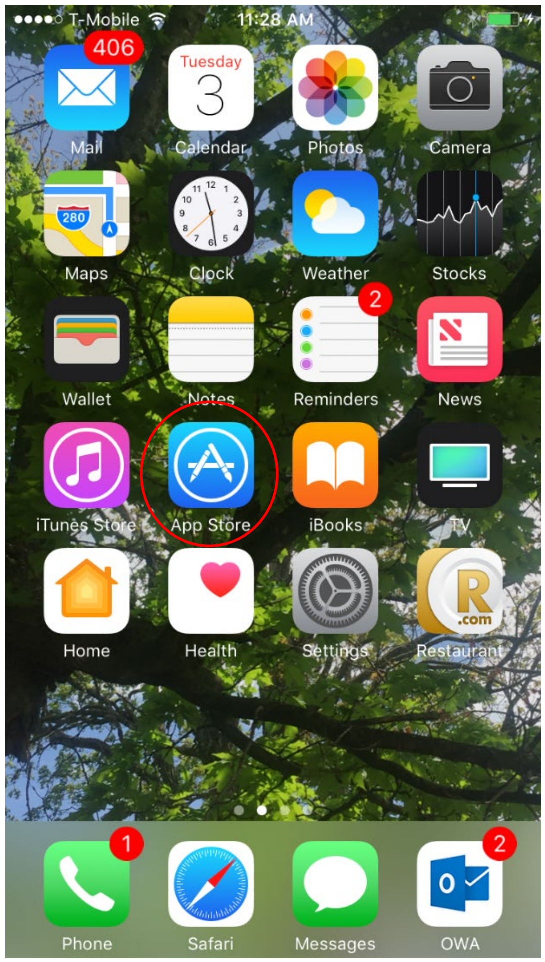


Table of Contents

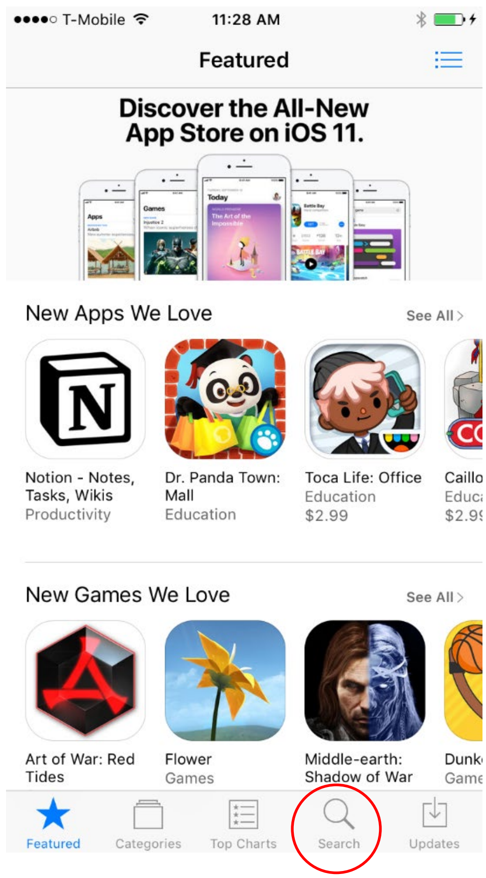
How to WinZip from Handheld

University of Arkansas IT Department instructions for installing support software for iOS and Android can be found at:
https://its.uark.edu/help/ta/371.php

1. Choose App Store.

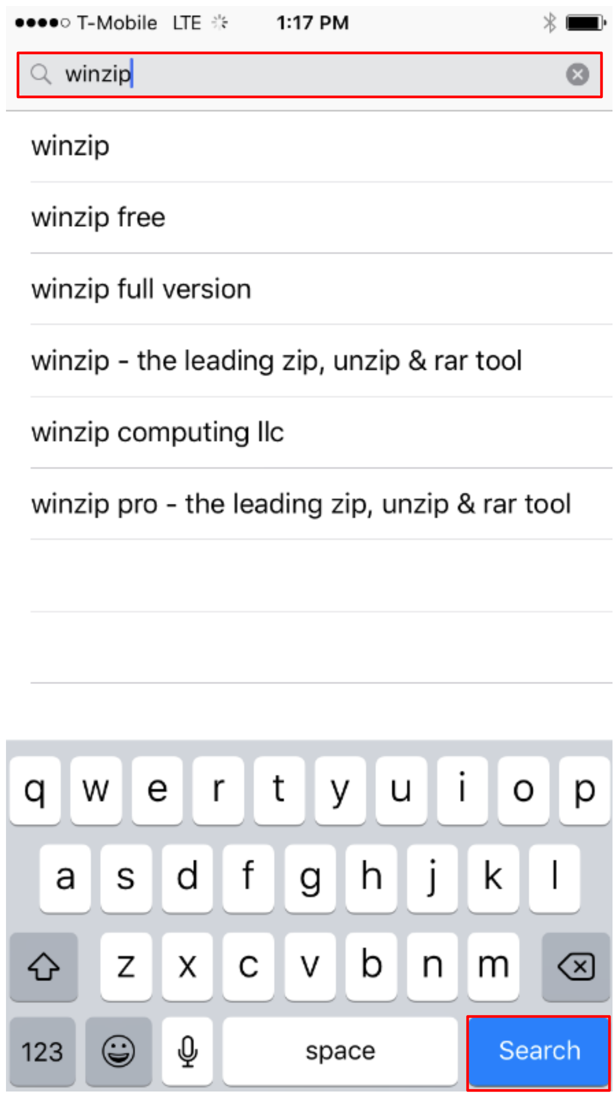


2. Choose the Magnifying Glass for **Search**.

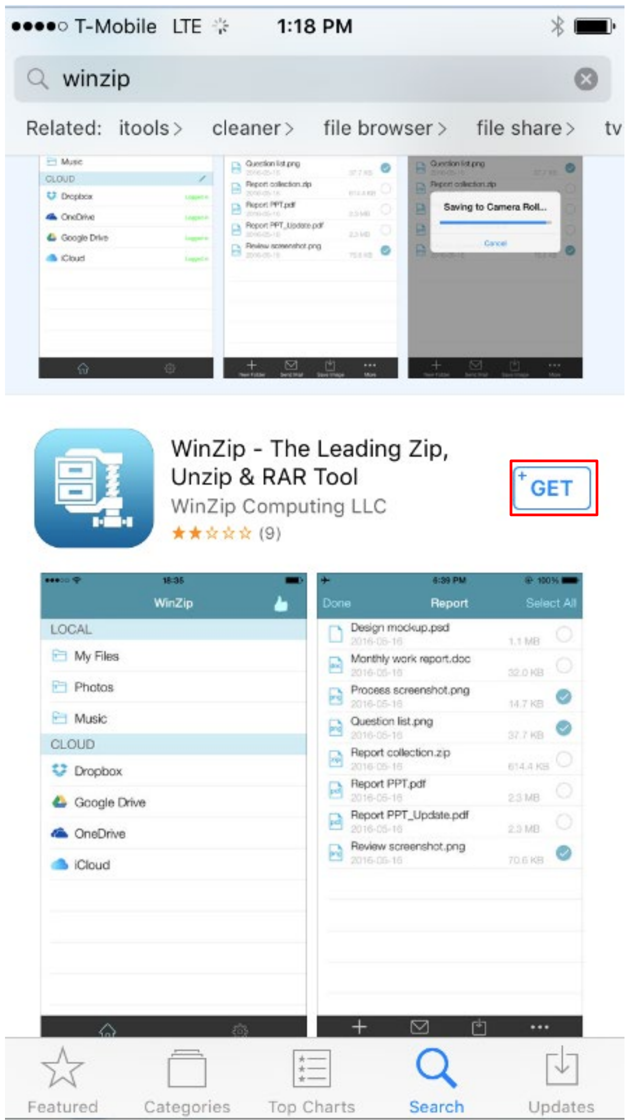


3. Type **WinZip** in the Search bar and press 

.

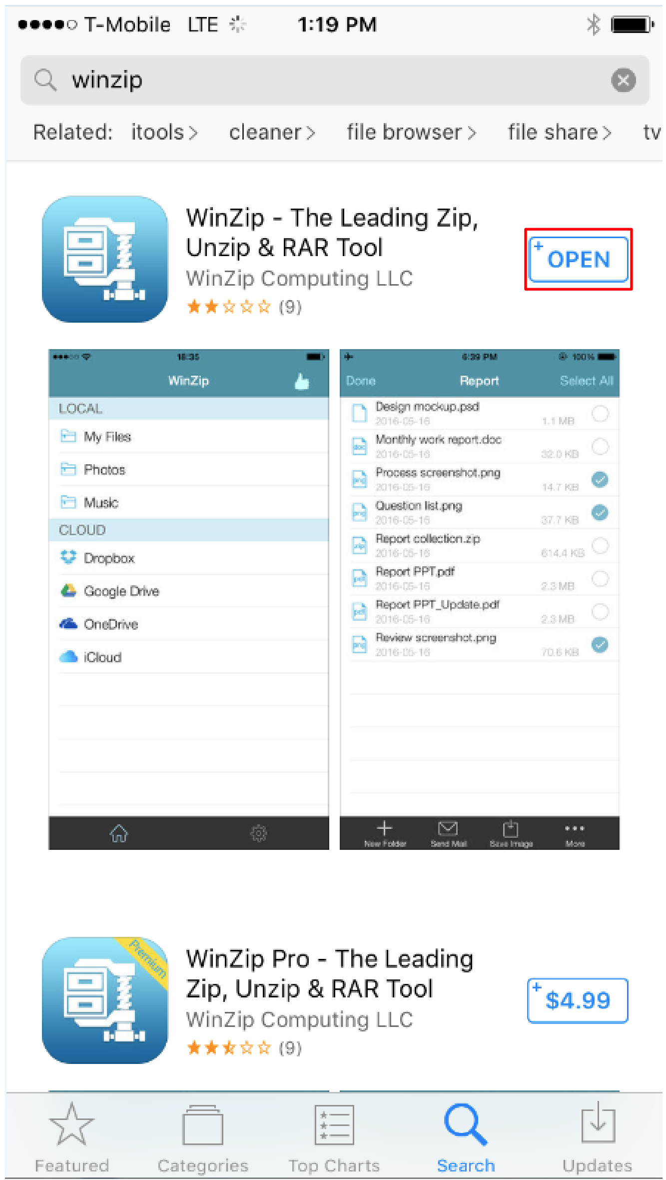


4. Scroll down till you find the FREE version of WinZip (unless you want to be able to access your OneDrive through WinZip…you'll need to purchase the full version for that functionality.)
5. Press  .

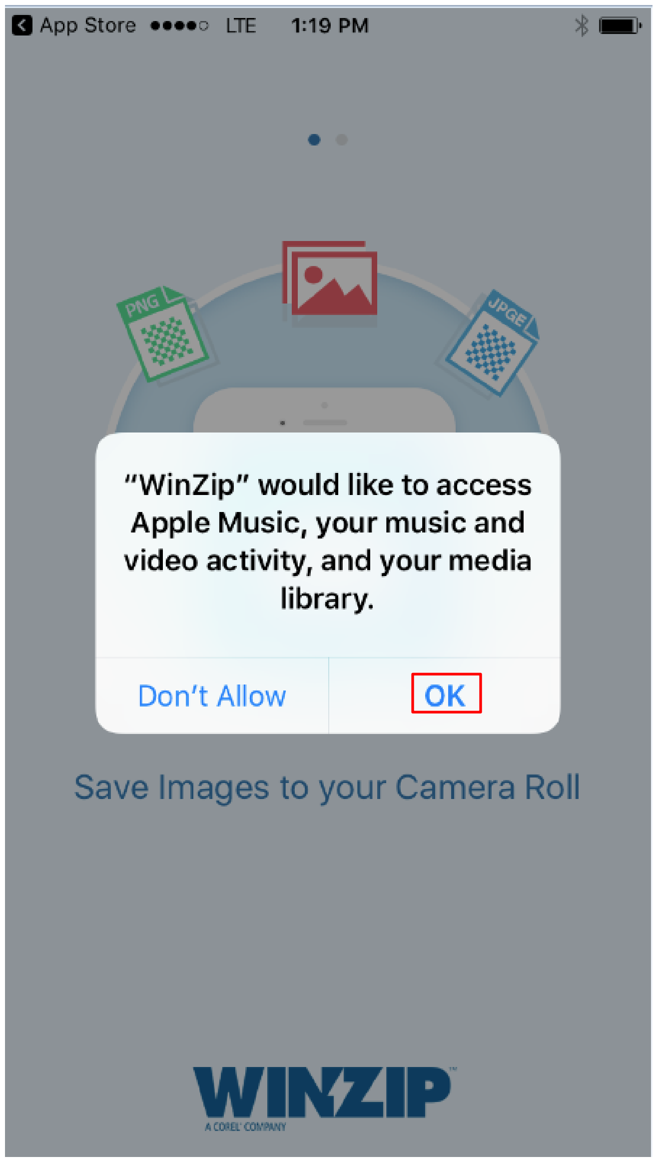


6. Wait for download.
7. Press 

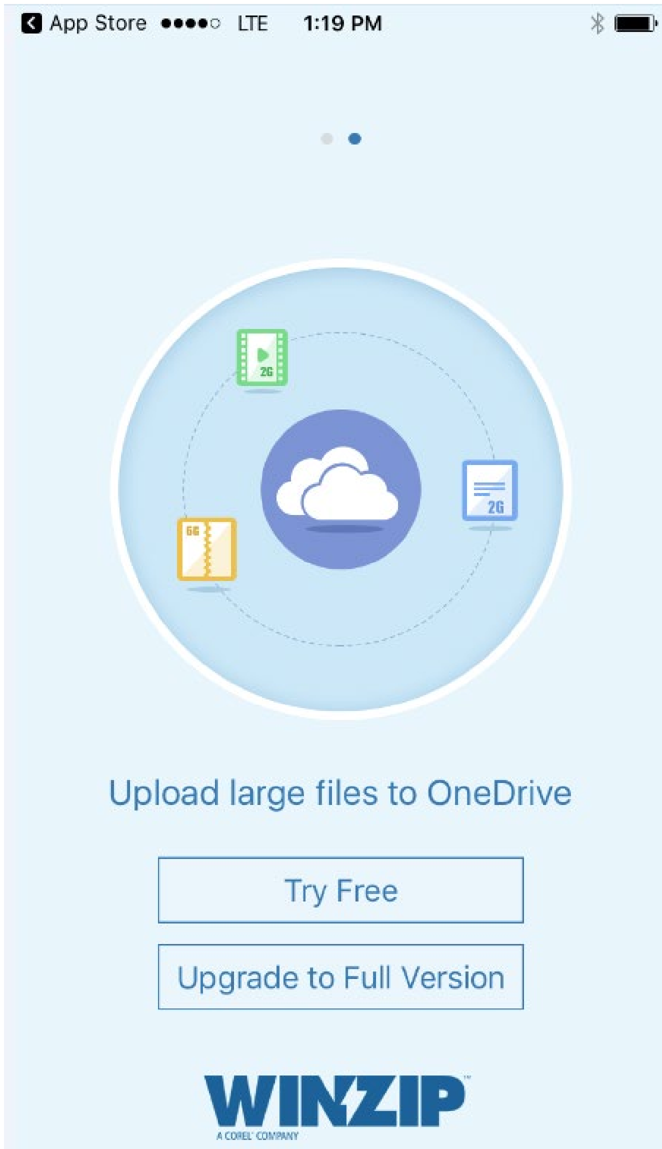
.



8. WinZip will ask for access to your Music, Pictures, etc. OK is a safe option.



9. Either choose the Free Version of WinZip or Upgrade to Full Version:



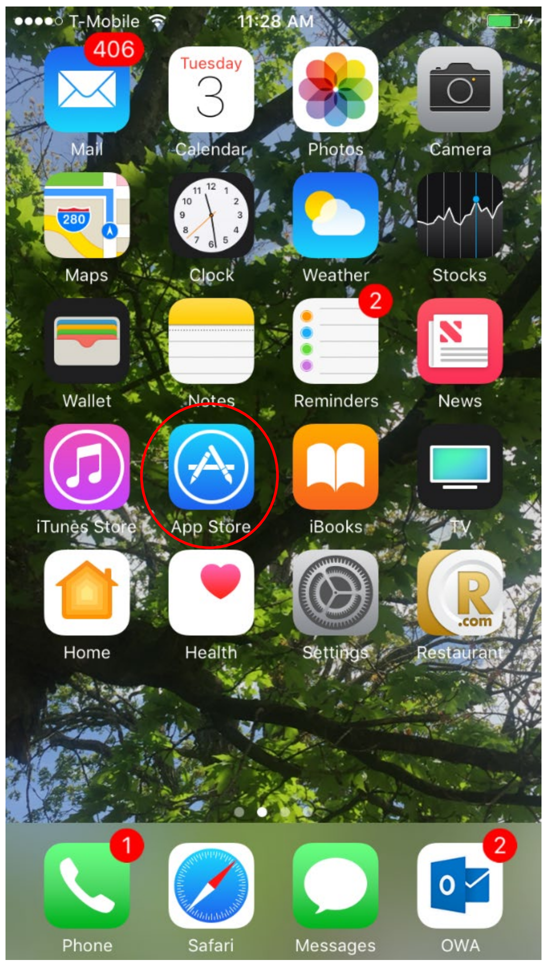
10. WinZip is installed.

How to VPN from Handheld

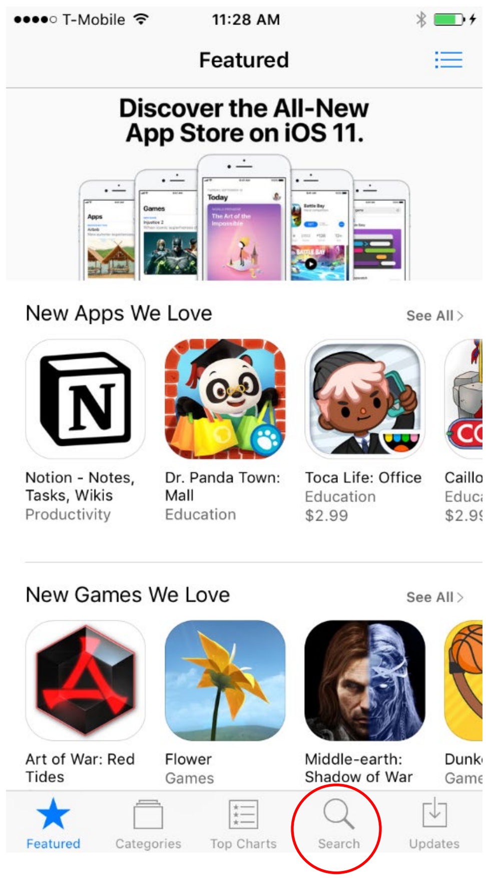
University of Arkansas IT Department instructions for installing support software for iOS and Android can be found at:
https://its.uark.edu/help/ta/371.php

This document captures the steps to install Pulse Secure on an iPhone 6.

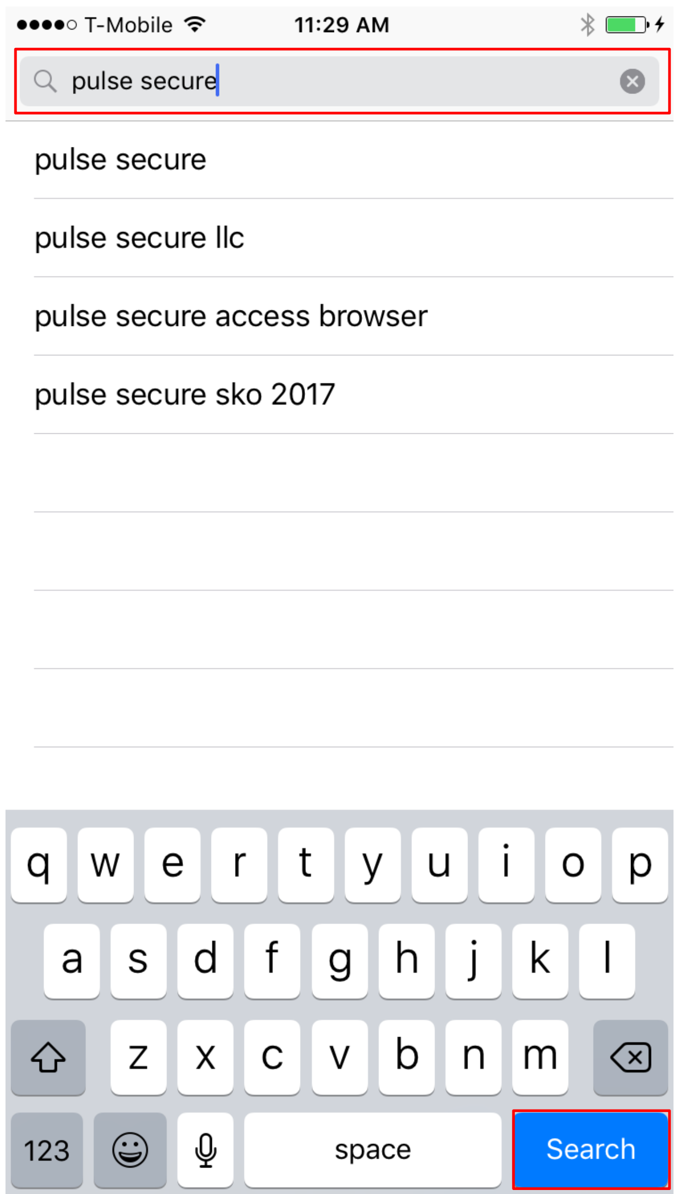
1. Choose App Store.



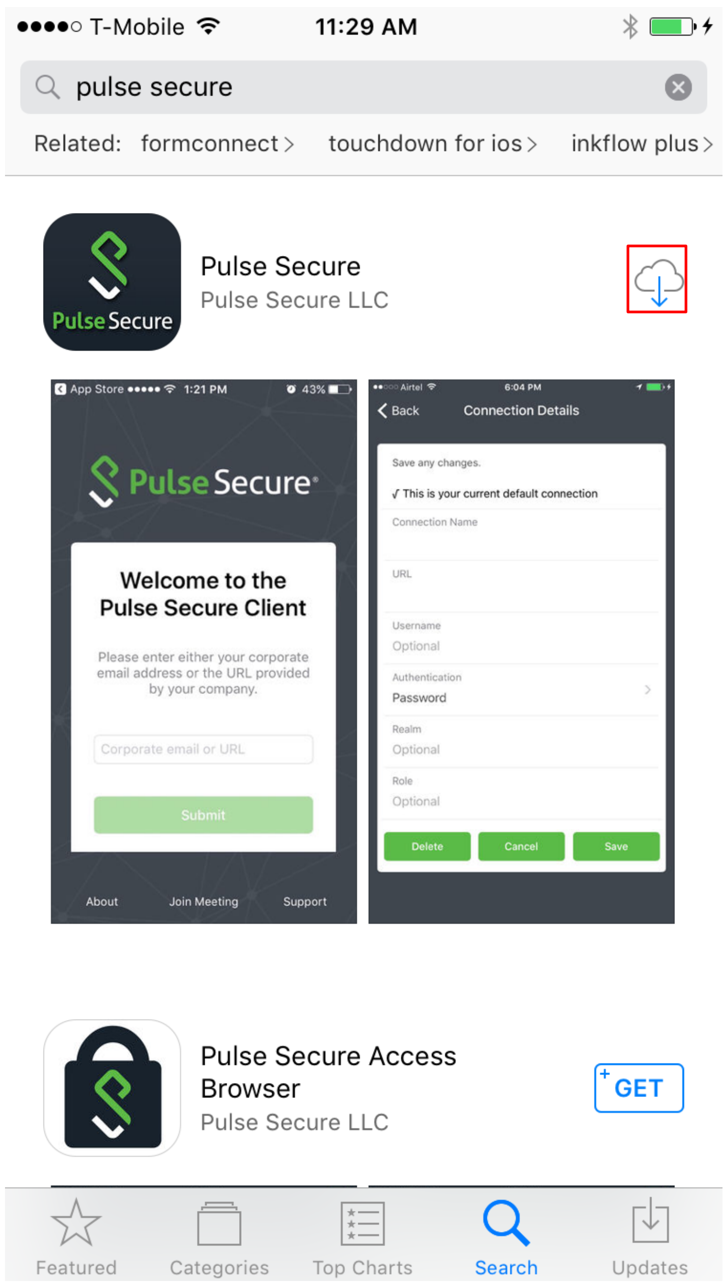
2. Choose the Magnifying Glass for **Search**.



3. Type pulse secure in the Search field and press .

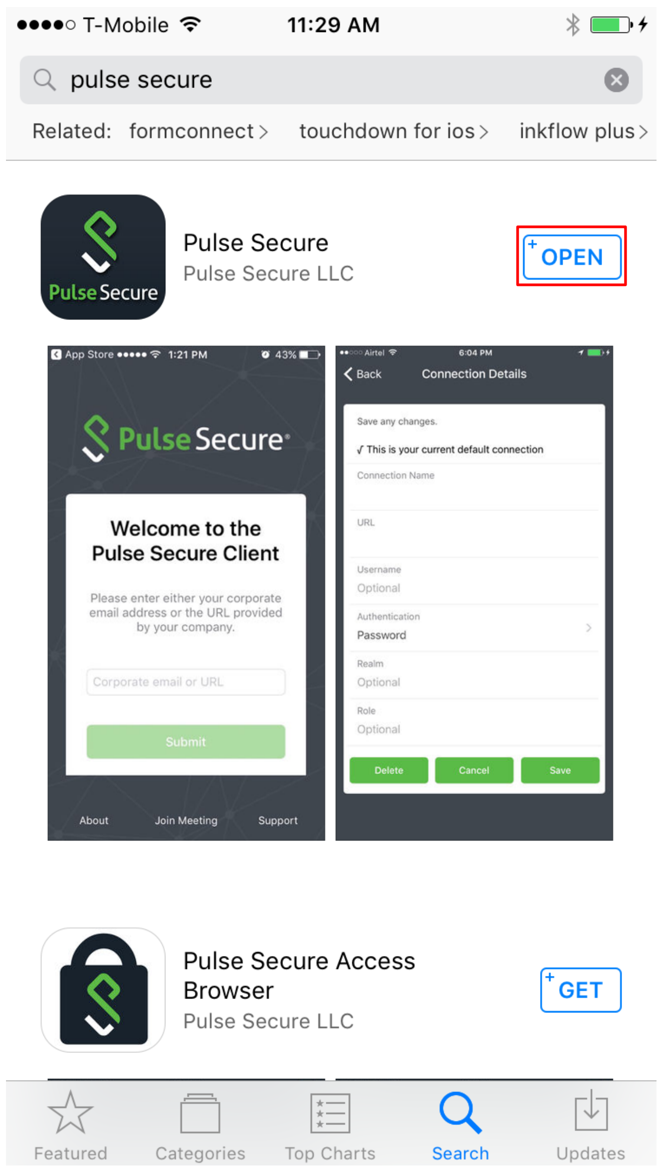


4. Find Pulse Secure in your Search results (mine came up first) and press the  .

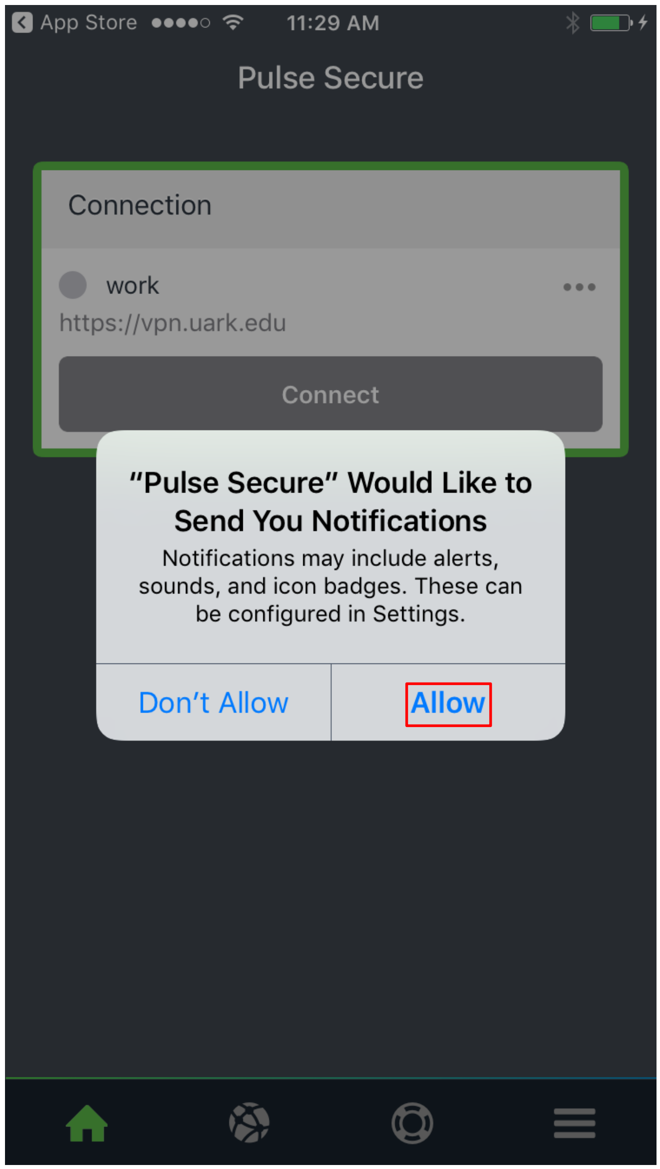


5. Wait for download.
6. Press 

.

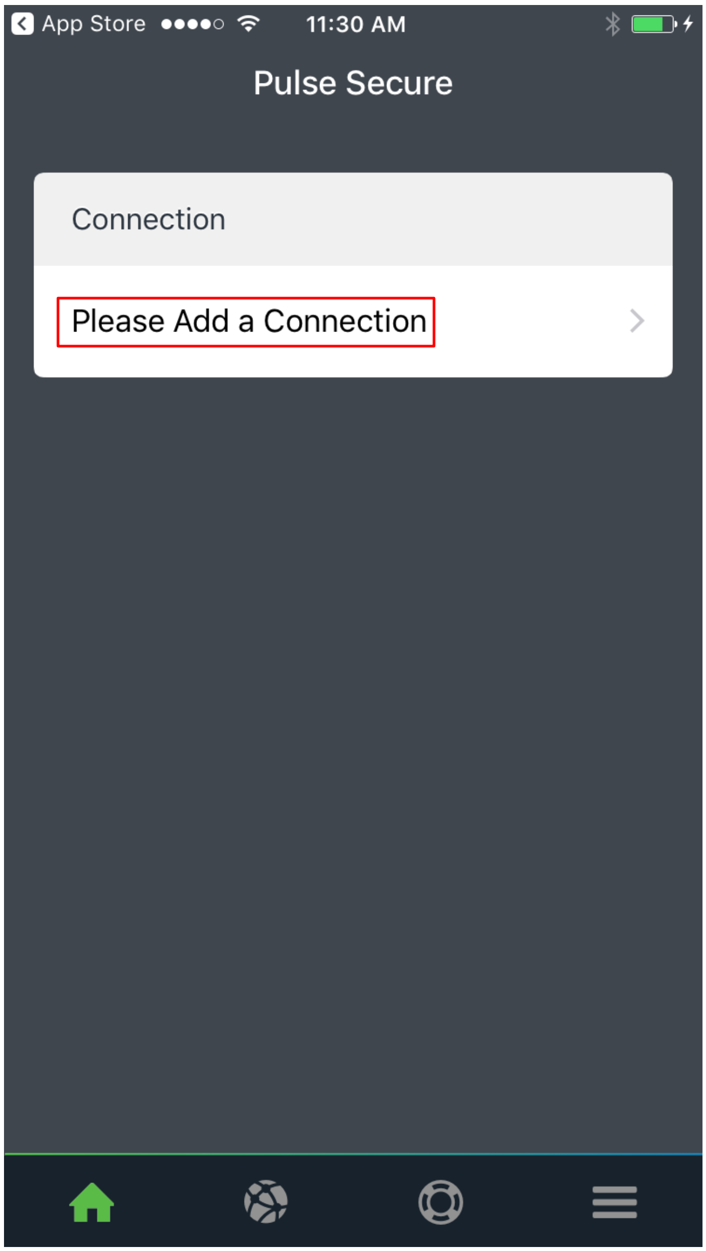


7. Pulse Secure will launch and it will ask you:

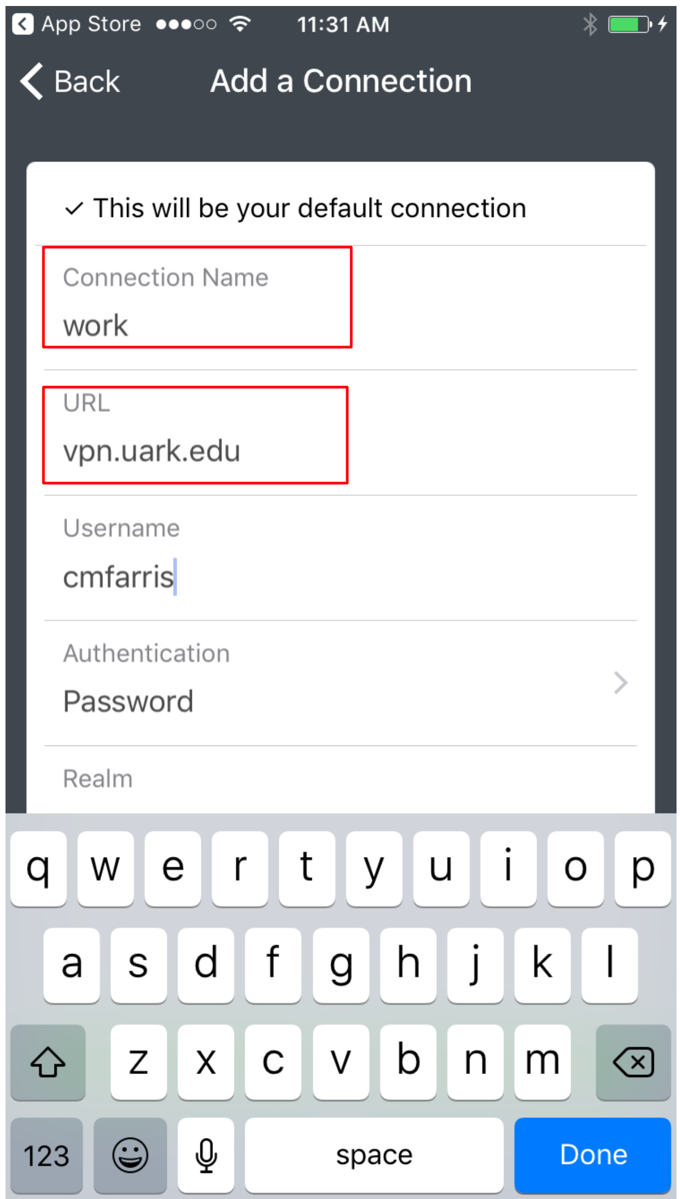


8. Click Allow.

9. Press **Please Add a Connection**.



10. Enter the following information and NOTHING more (**Leave Password alone**):



11. Scroll down.

12. Click 

.

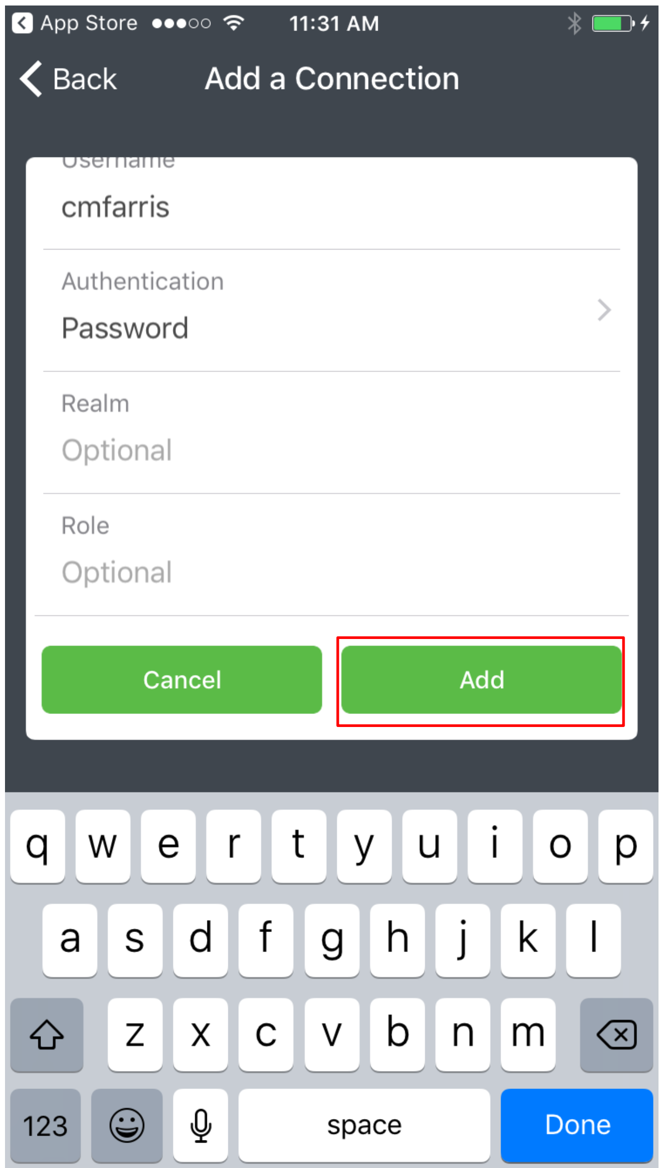
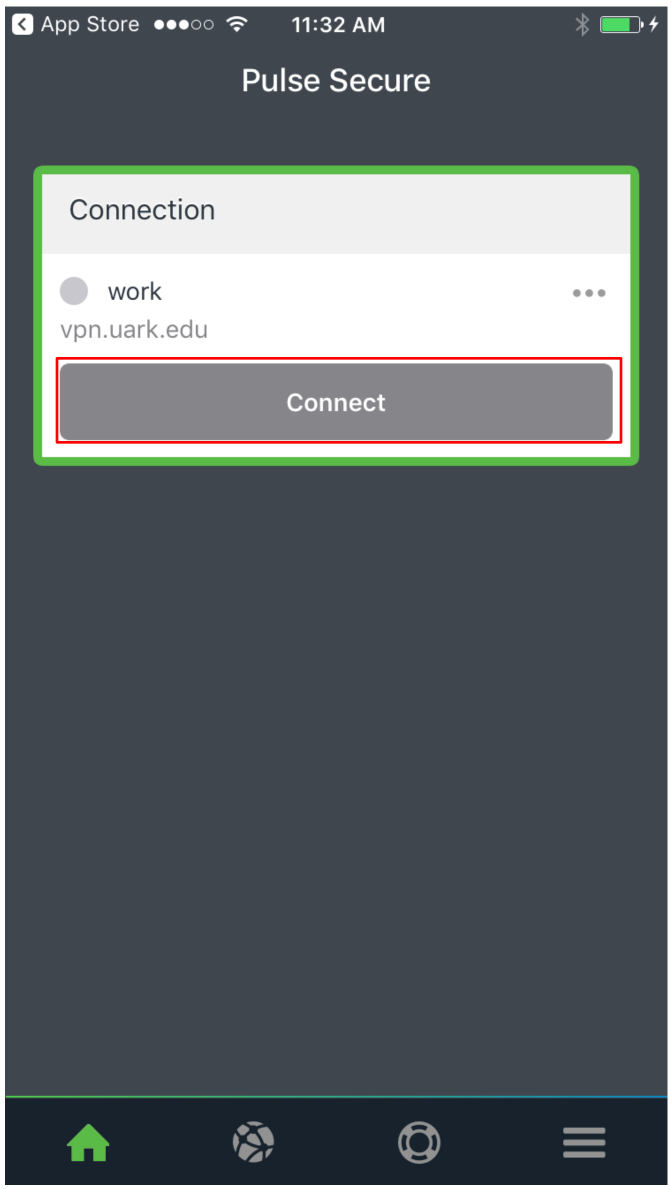


Table of Contents

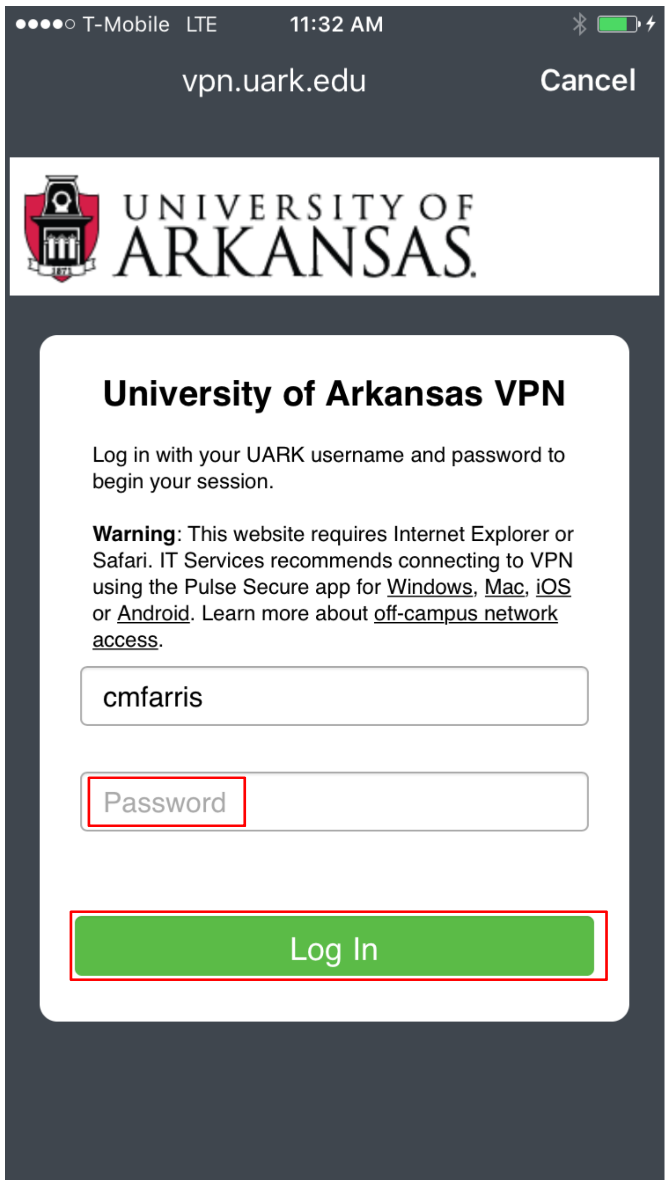
13. Your screen should now show the "work" VPN. It is NOT connected.

14. Click 

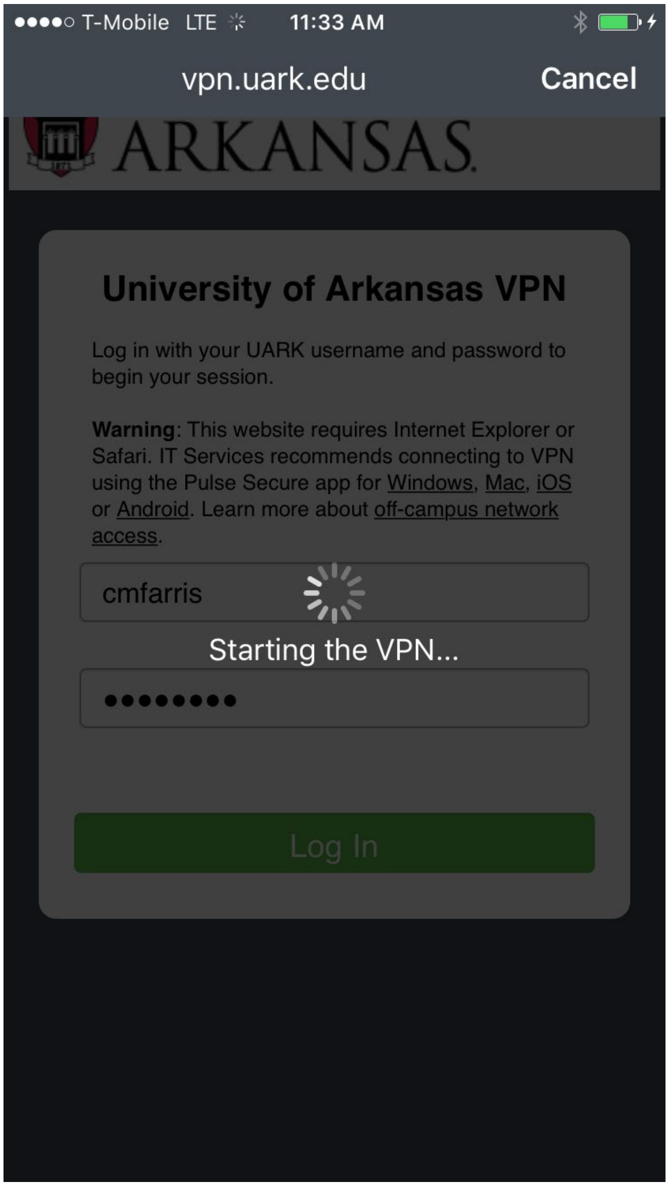
.



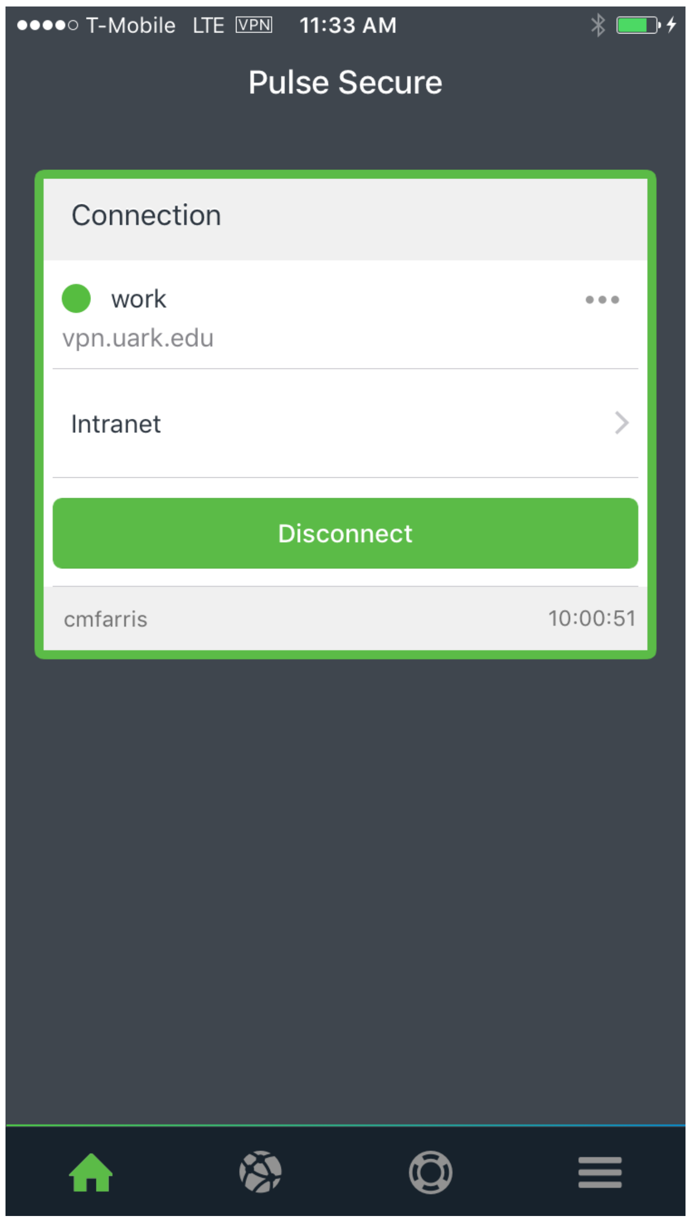
15. Enter your password.
16. Press .



17. Phone will connect to VPN. **(***NOTE***: MAKE SURE YOUR PHONE IS NOT CONNECTED TO THE U OF A GUEST WIRELESS NETWORK. ***NOTE***)**



18. The VPN should now be connected. Press the  button to disconnect.

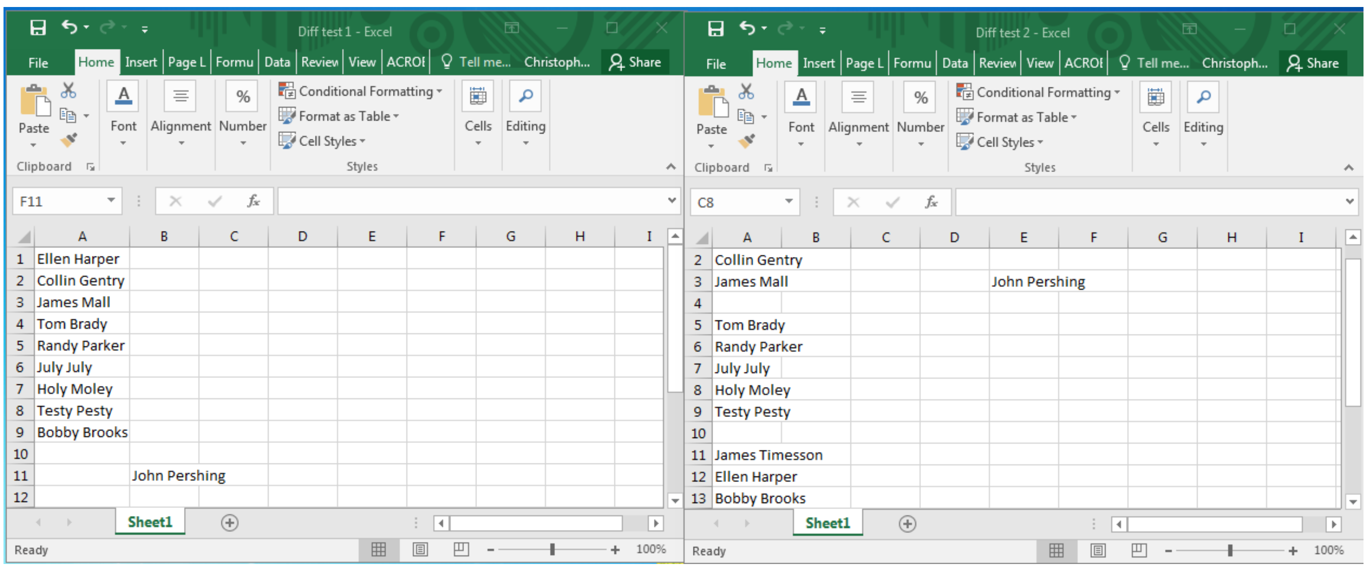


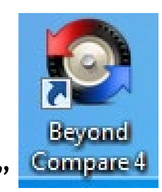
How to Find Differences in Excel Files

For this example I have created two Excel Files with a list of names in each. Most of the names match but:

- They are not all in the same row.
- They are not all in the same column.
- Some names do not match at all.

Here is a screen capture of the two Excel files that I am using:



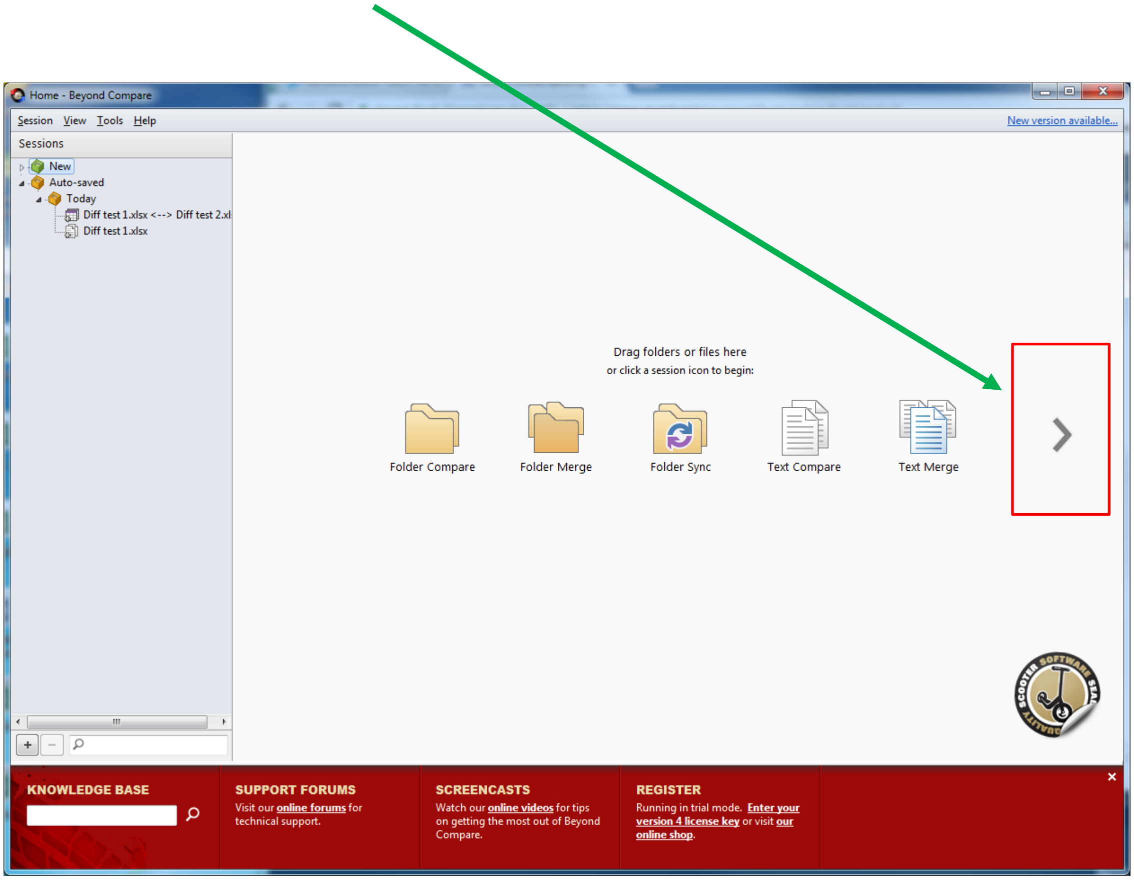
I am using a tool on my Windows Desktop called “Beyond Compare 4.” 

Here is how you use it:

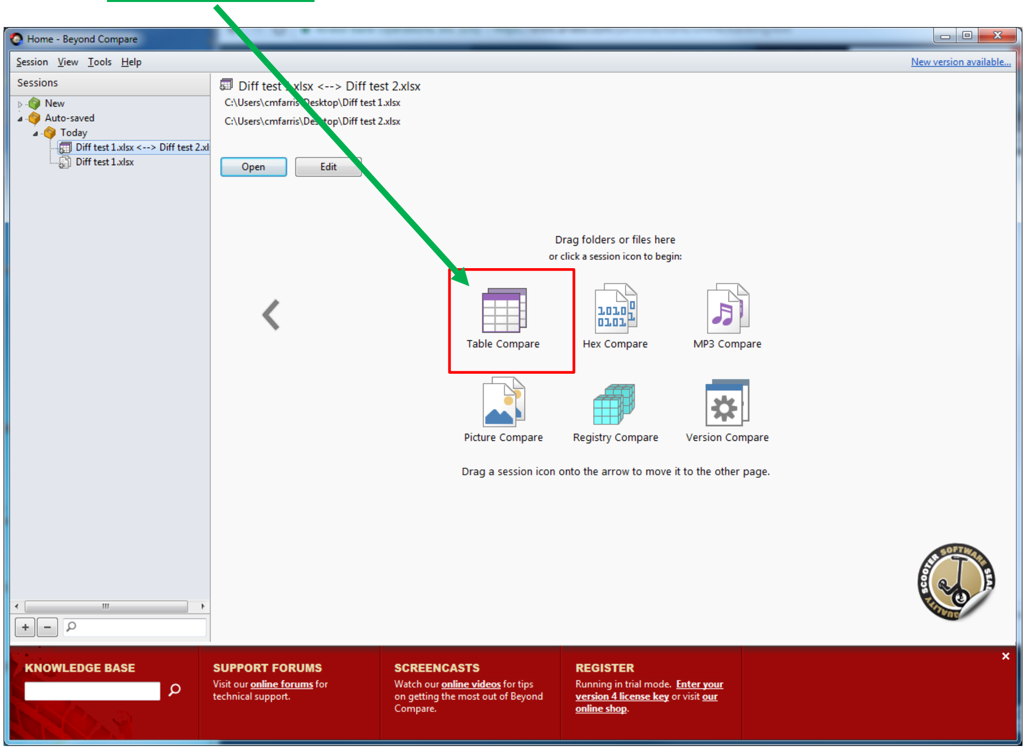
1. Double click the desktop icon.
2. It may ask some licensing questions. If so, continue with free unless/until you can get the full rights to the package. Better to stay free until you see if this is helpful.

Table of Contents

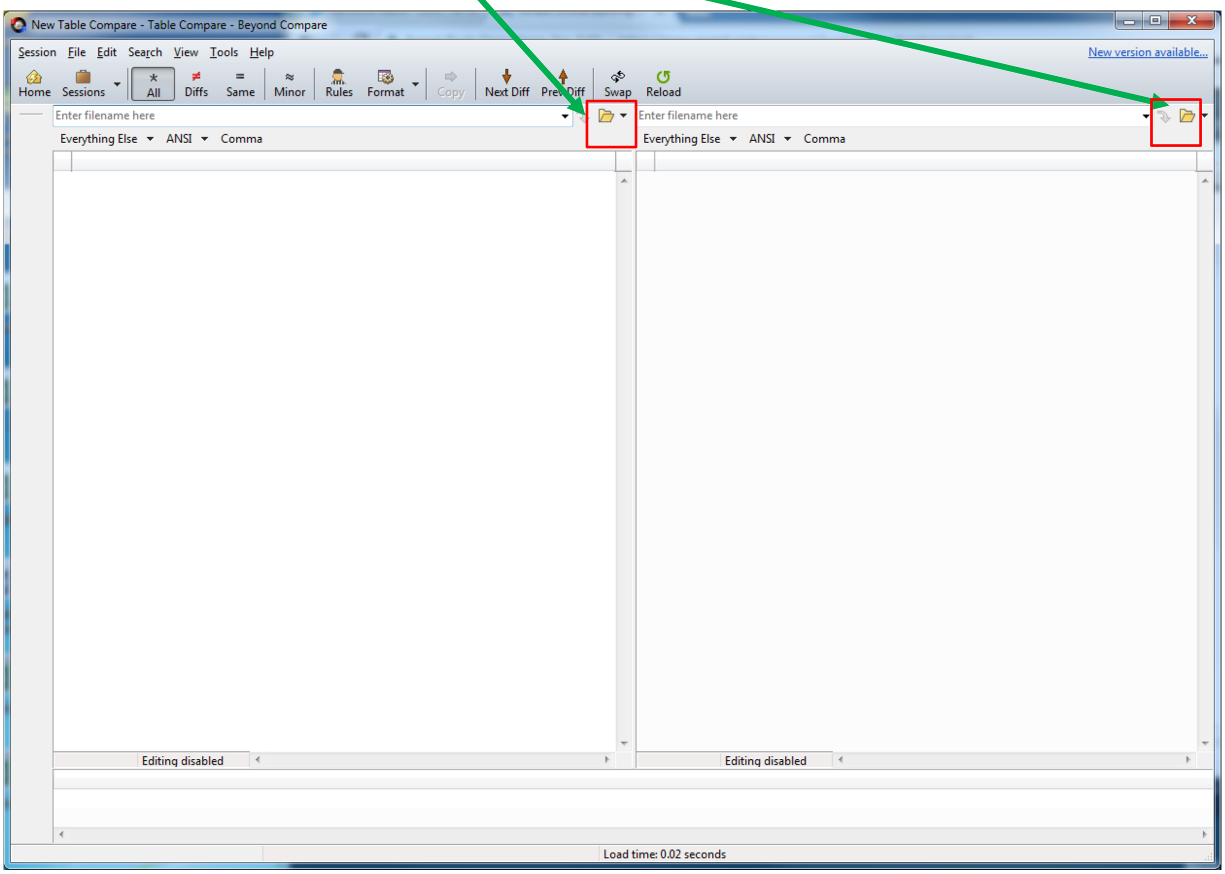
3. You should see the below appear.
4. Click the arrow on the right side of the application



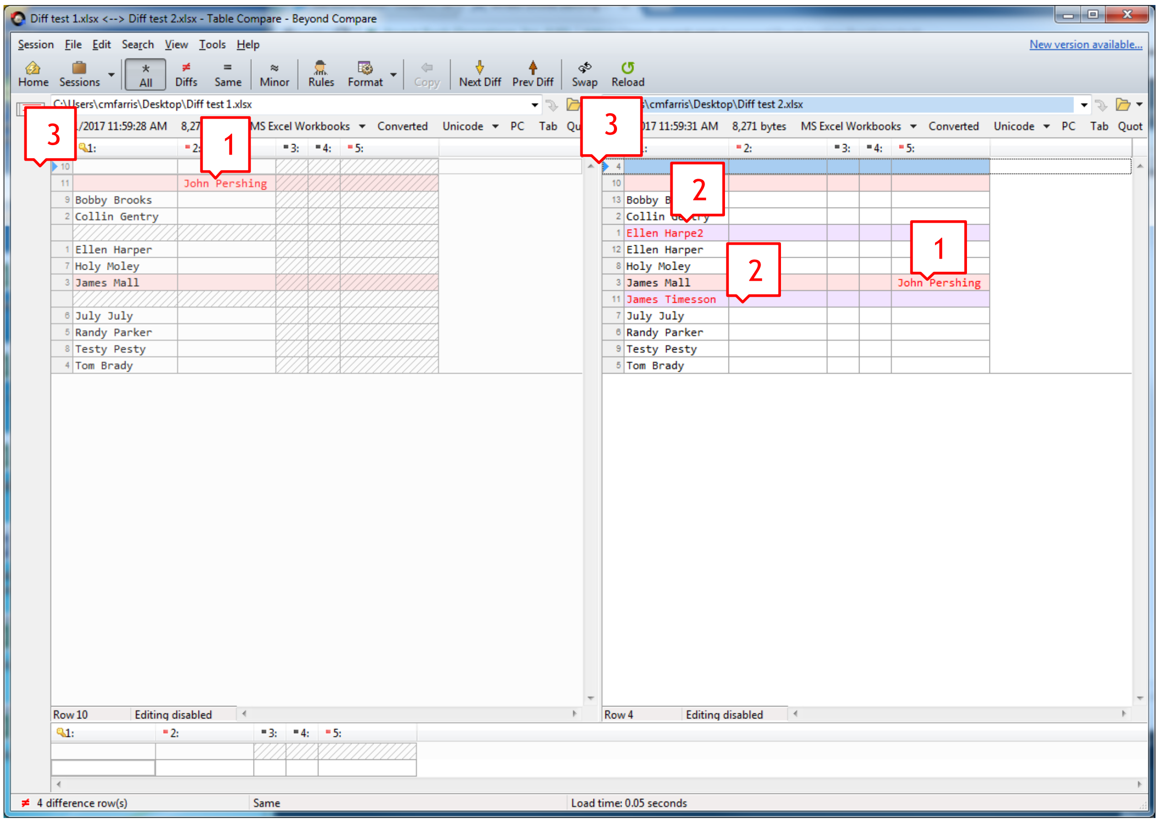
5. Choose the "Table Compare" icon.



6. Click the folder on the **left side** and find the first file (my file above was Diff test 1) that you want to compare.
7. Click the folder on the **right side** and find the second file (mine was Diff test 2) that you want to compare.



8. The tool should automatically compare the two files in the main window.
9. Here is what mine looks like (I've added some notes below:)



NOTES

1. John Pershing shows up in both spreadsheets BUT they are not in the same column so they do NOT match.
2. James Timesson and Ellen Harpe2 appear in the second spreadsheet but not the first. The software is not smart enough to tell that Ellen Harpe2 is similar to Ellen Harper. No match.
3. The column that I have tagged with the number 3 shows you what ROW the name is found in the Excel document. This is good news; it means that, as long as the information is in the same column and is spelled the same, it can be in ANY ROW and the tool will still find it.
4. In short: Entries must be in the same column in both spreadsheets. Entries do NOT have to be in the same row in both spreadsheets.

5. Last note: The red names are obvious mismatches. The "pink" lines show you the lines that differ in one way but not all ways.

Appendix 1: Training Overview

❖ADVANCE—Introduction

❖ADVANCEd—Refresher

❖ADVANCEd—Events

❖ADVANCEd—Contact Reports

❖ADVANCEd—Tasks

❖ADVANCEd—Proposals

❖ADVANCEd-- Crystal

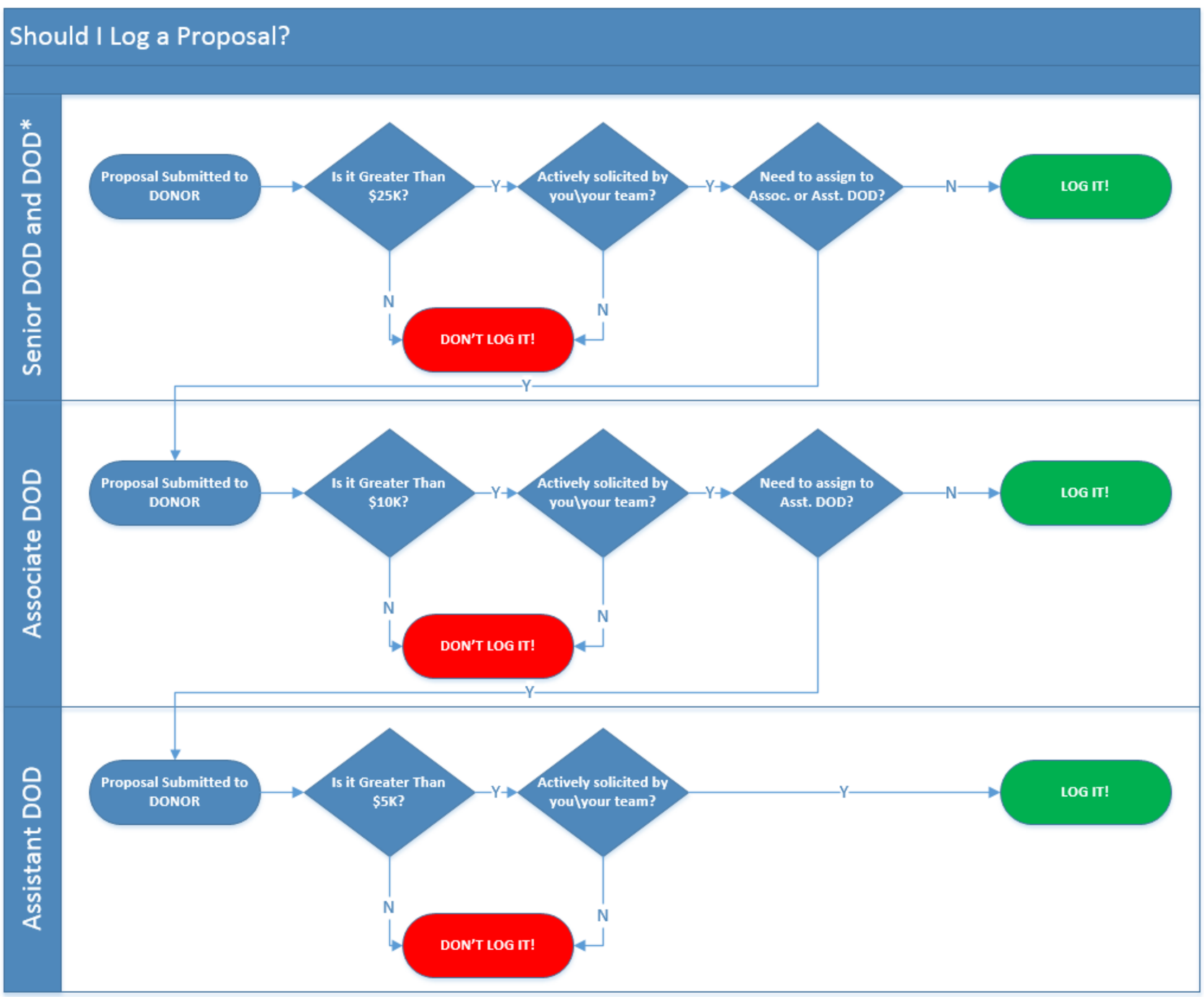
❖ADVANCEd—Clipboard

❖Blackbaud—Foundation Reports

❖NoSS/Perceptive—Notice of Student Support

Appendix 2: Proposal Flowchart

PROPOSAL FLOWCHART



*DODs generally only receive credit for major gift proposals of $25K+, but may log a proposal less than $25K on behalf of their unit if necessary.

Appendix 3: Advance Shortcuts

	HELP	CONTEXT LOOKUP	RESTART WITH NEW ID	CLIPBOARD		GoTo	NEW	REFRESH WINDOW	SAVE		INQUIRY/ MAINT.	MENU	PASTE from CLIPBOARD	COPY to CLIPBOARD
	F1	**F2**	**F3**	**F4**		**F5**	**F6**	**F7**	**F8**		**F9**	**F10**	**F11**	**F12**
CTRL				**Close Window**	CTRL					CTRL				
ALT	**Context Site Help**			**Close Advance**	ALT	**Ctrl + U - Open Parent Window**				ALT		**Alt + Dn Arrow - Open Dropdown List**		
SHIFT	**Site Help**		**Spouse Info.**	**Entity Lookup**	SHIFT	**Ctrl + I - Show Audit Information**						**Alt + Up Arrow - Open Dropdown List**		

Appendix 4: Foundation Account Code List

Account Number

Fund/Campus-First two digits
Account Code-Five digits:

01-10	1XXXX	Assets
01-10	2XXXX	Liabilities
01-10	3XXXX	Fund Balance
01-10	4XXXX	Revenue
01-10	5XXXX	Expense

GIFT/PLEDGE REVENUE ACCOUNT CODES

G	40000	Gift Cash	GF	Gift
G	40100	Gift Credit Card	GF	Gift
G	40200	Gift Stock	GF	Gift
G	40300	Gift Bond	GF	Gift
G	40400	Gift Land	GF	Gift
G	40500	Gift Other	GF	Gift
TX	42100	Annual Fund Tax	GF	Gift
G	41000	Pledge	PL	Pledge

NON-GIFT REVENUE ACCOUNT CODES

SP	43000	Sponsored Programs	OT	Other Income
MD	47000	Membership Dues	OT	Other Income
SL	47100	Sales	OT	Other Income
SV	47200	Services	OT	Other Income
OT	47300	Other	OT	Other Income

OTHER REVENUE ACCOUNT CODES

TS	45000	Trust Income	OT	Other Income
ID	44000	Interest and Dividends	IN	Interest
ID	44100	Interest TRP	IN	Interest
IS	44200	Interest SIP	IN	Interest
GL	46000	Gain(Loss)	GL	Gain-Loss

FACULTY/STAFF SUPPORT EXPENSE ACCOUNT CODES

22	50500	Salaries Non-Research	EX	Expense
18	53000	Fac/Staff Scholarly Travel	EX	Expense
19	50000	Other Fac/Staff Support	EX	Expense

RESEARCH RELATED EXPENSE ACCOUNT CODES

23	52500	Salaries-Research	EX	Expense
20	53500	Research-Travel	EX	Expense
21	51500	Other Research	EX	Expense

OTHER EXPENSE ACCOUNT CODES

2	52000	Student Support	EX	Expense
4	54000	Recruiting	EX	Expense
5	55000	Sponsored programs	EX	Expense
6	56000	Equipment & Furnishings	EX	Expense
7	57000	Construction	EX	Expense
8	58000	Fund raising	EX	Expense
9	59000	Other Operating	EX	Expense
10	51000	Public/staff relations	EX	Expense

EXPENSE ACCOUNT CODES USED BY FOUNDATION STAFF				
12	54500	Depreciation	EX	Expense
13	55500	Write down of property	EX	Expense
14	57500	Allowance for bad debt	EX	Expense
15	56500	Change in value split int agreement	EX	Expense
WO	60000	Pledge write-off		

Acct Code	Acct Code Description	Account Category	
10000	Cash	CA	Cash
11000	Pledge Receivable	PR	Pledge Receivables
11200	Pledge Discount	PR	Pledge Receivables
11400	Pledge Allowance	PR	Pledge Receivables
11600	Interest Receivable	OA	Other Asset
11800-11999	Notes Receivables	OA	Other Asset
12000	Cash Value Life Insurance	OA	Other Asset
13000	Land Gift Clearing	OA	Other Asset
13001-13499	Land	OA	Other Asset
13500-13599	Buildings	OA	Other Asset
13600-13699	Depreciation Buildings	OA	Other Asset
13700-13899	Equipment	OA	Other Asset
13900-13999	Depreciation Equipment	OA	Other Asset
14000-14499	US Govt Obligations	OA	Other Asset
14500-14999	Corporate Obligations	OA	Other Asset
15000-15999	Individual Equity Investments	OA	Other Asset
16000-16199	Intermediate Pool	OA	Other Asset
16400-16599	MF Limited Partnerships	OA	Other Asset
16600-16999	Pooled Income	OA	Other Asset
17000-17999	Gift Annuity	OA	Other Asset
18000-18999	CRATS	OA	Other Asset
19000-19999	CRUTS	OA	Other Asset
16200-16399	Total Return Pool	PA	Pooled Assets
20000	Accounts Payable	AP	Accounts Payable
20100	Accounts Payable-University	AP	Accounts Payable
21000-21999	A/O Gift Annuity	AP	Accounts Payable
22000-22999	A/O CRATS	AP	Accounts Payable
23000-23999	A/O CRUTS	AP	Accounts Payable
24000-24999	A/O Dist Payable	AP	Accounts Payable
30000	Project Fund Balance	FB	Fund Balance

Appendix 5: Assistance Center eMails

Group	Purpose	eMail Address	When should I email?
Records	Update of Biographic Information including Marital Status, Birth, Death, Address Change, Children, etc.	records@uark.edu	Any time you discover that Advance Entity information needs to be updated.
Research	Provides up-to-date, in-depth and correct Biographical data for potential and existing donors.	research@uark.edu	Any time you need detailed information about a potential or existing donor.
Imaging	Uploads high-quality images to data storage and links to Advance Entity.	imaging@uark.edu	Any time you have a memo, email, letter, card photo, or other type of document that needs to be stored for future information.
Gift Services	Responsible for entering all financial transactions into Advance and	giftserv@uark.edu	When you have gift-related information or updates.

	other financial databases.		
AITS	All reporting and training.	aits.uark.edu	When you need to contact donors, have a special report request or need training on Advance, NOSS or Blackbaud.
Proposals	Entering and tracking Proposals in Advance.	proposal@uark.edu	When you need to submit or update a proposal.