

---

*Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

# Development Officer Handbook

---

# *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

## **Table of Contents:**

-  [Contact Reports How to Create and View Contact Reports](#)
-  [Record a Proposal In Contact Reports](#)
-  [Tasks](#)
-  [How to Use Crystal Reports](#)
-  [How to OneDrive from Handheld](#)
-  [How to WinZip from Handheld](#)
-  [How to VPN from Handheld](#)
-  [How to Find Differences in Excel Files](#)
-  [Appendix 1: Training Overview](#)
-  [Appendix 2: Proposal Flowchart](#)
-  [Appendix 3: Advance Shortcuts](#)
-  [Appendix 4: Foundation Account Code List](#)
-  [Appendix 5: Assistance Center eMails](#)

# Contact Reports

## How to Create and View Contact Reports

# Development Officer Handbook

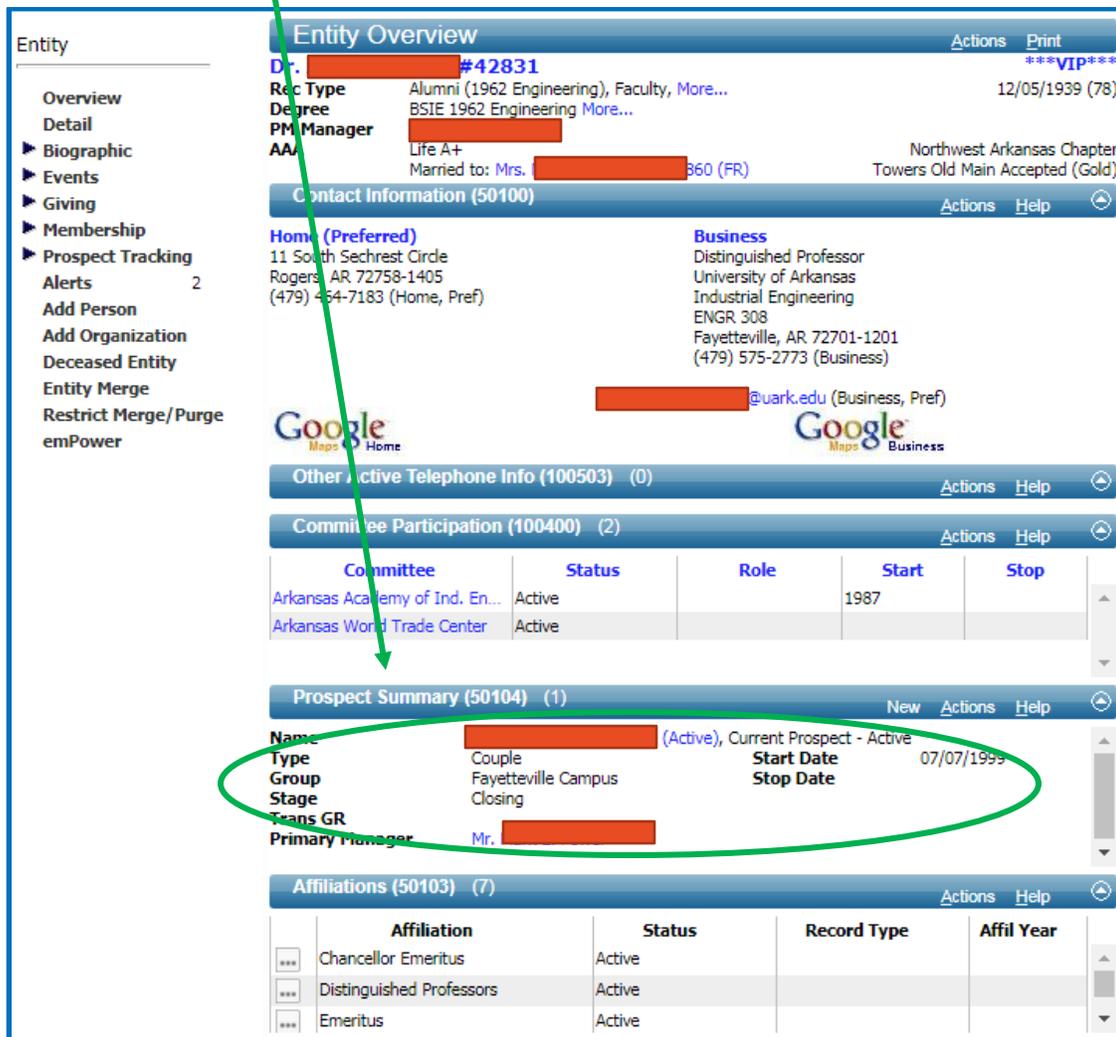
Ver. 1.3

## Create Contact Report

12 December 2018

*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.



**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** [REDACTED]

**AA** Life A+ Northwest Arkansas Chapter

**Married to:** Mrs. [REDACTED] 860 (FR) Towers Old Main Accepted (Gold)

**Contact Information (50100)** Actions Help

**Home (Preferred)** Business

11 South Sechrest Circle Distinguished Professor  
Rogers, AR 72758-1405 University of Arkansas  
(479) 464-7183 (Home, Pref) Industrial Engineering  
ENGR 308  
Fayetteville, AR 72701-1201  
(479) 575-2773 (Business)

[REDACTED]@uark.edu (Business, Pref)

**Other Active Telephone Info (100503) (0)** Actions Help

**Committee Participation (100400) (2)** Actions Help

Committee	Status	Role	Start	Stop
Arkansas Academy of Ind. En...	Active		1987	
Arkansas World Trade Center	Active			

**Prospect Summary (50104) (1)** New Actions Help

**Name** [REDACTED] (Active), Current Prospect - Active

**Type** Couple Start Date 07/07/1999

**Group** Fayetteville Campus Stop Date

**Stage** Closing

**Trans GR**

**Primary Manager** Mr. [REDACTED]

**Affiliations (50103) (7)** Actions Help

Affiliation	Status	Record Type	Affil Year
Chancellor Emeritus	Active		
Distinguished Professors	Active		
Emeritus	Active		

---

## *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

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](mailto: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**.*

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

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 Towers Old Main Accepted (Gold)

Married to: Mrs. [REDACTED] #160860 (FR)

... 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	1,502,262.50	0.00	0.00	1,964,777.34
<b>Total</b>	<b>474,164.84</b>	<b>1,501,262.50</b>	<b>0.00</b>	<b>0.00</b>	<b>1,975,427.34</b>

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	823,298.12	1,611,762.50	0.00	0.00	2,425,060.62
<b>Total</b>	<b>823,948.12</b>	<b>1,611,762.50</b>	<b>0.00</b>	<b>0.00</b>	<b>2,435,710.62</b>

---

**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:

# Development Officer Handbook

Ver. 1.3

12 December 2018

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

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

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

**Contact Report (80086)** Save Actions Help

Report ID: 0      Date\*: 03/09/2018

Contacted ID: 42831      **[Redacted]**

**Joint**      **[Redacted]**

Spouse ID: 160860      **[Redacted]**

Contact Type\*: A

Purpose\*: B

Unit: UDE      University Development

Author\*: C

Description\*: **D**

Text: **E**

Program: F

Prospect ID: 2662      **[Redacted]** - Fayetteville Campus

Proposal ID: G

Name\*: **[Redacted]**

Sort Name\*: **[Redacted]**

Title/Addr: **[Redacted]**

**Auto-populates. You can unclick the Joint box if Donor does not want Joint credit.**

**Auto-populates if Prospect ID exists.**

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

## A. Contact Type\*

Contact Type	Definition
A	<b>(Attempted Contact)</b> tried to contact a current or prospective donor by phone, email or letter with no response
B	<b>(Token of Appreciation)</b> a memento that was presented or sent to a current or prospective donor or constituent
C	<b>(LinkedIn)</b> You connected with a current or prospective donor through LinkedIn
D	<b>(Twitter)</b> 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	<b>(Email)</b> correspondence by email with a current or prospective donor
F	<b>(Facebook)</b> You connected with a current or prospective donor through Facebook
G	<b>(Campaign/Member)</b> An interaction with alumni, donors, and board members at a campaign or board meeting
I	<b>(Information)</b> 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	<b>(Letter)</b> Written correspondence in letter format that was sent by mail or email to a current or prospective donor
N	<b>(Events)</b> 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	<b>(Campus Visit/Meeting)</b> An interaction on campus by a DOD that was pre-arranged for a current or prospective donor to visit the University
R	<b>(Stewardship Reports)</b> 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	<b>(Personal Scheduled Visit/Meeting)</b> 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	<b>(Phone Call)</b> Making or receiving a phone call with a current or prospective donor or constituent
U	<b>(Personal Unscheduled Visit/Meeting)</b> A chance interaction with a current or prospective donor where the conversation moves the relationship forward on the donor commitment continuum

# Development Officer Handbook

Ver. 1.3

12 December 2018

V	( <b>Chat/IM</b> ) 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 <b>green</b> )
Z	(Appreciation) Donor Relations
I	(1 <sup>st</sup> 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 6<sup>th</sup> of month as new **Prospect IDs** update to CRs.

# Development Officer Handbook

Ver. 1.3

12 December 2018

## 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:

A screenshot of a web form titled "Contact Report (80086)". At the top, a yellow banner says "Save completed successfully". Below the title bar, there are several fields: "Report ID" (139510), "Date\*" (03/09/2018), "Contacted ID" (42831), "Spouse ID" (160860), "Contact Type\*" (S), "Purpose\*" (S), "Unit" (UDE), "Author\*" (532188), "Description\*" (Meeting to discuss UG Scholarship for Clown School), "Text" (d to fund the \$500 scholarship. We met at Mermaids at noon.), "Program", "Prospect ID" (2662), "Proposal ID" (14923), "Name\*" (Dr.), "Sort Name\*" (WHITE,JOHN,A.), and "Title/Addr".

# Development Officer Handbook

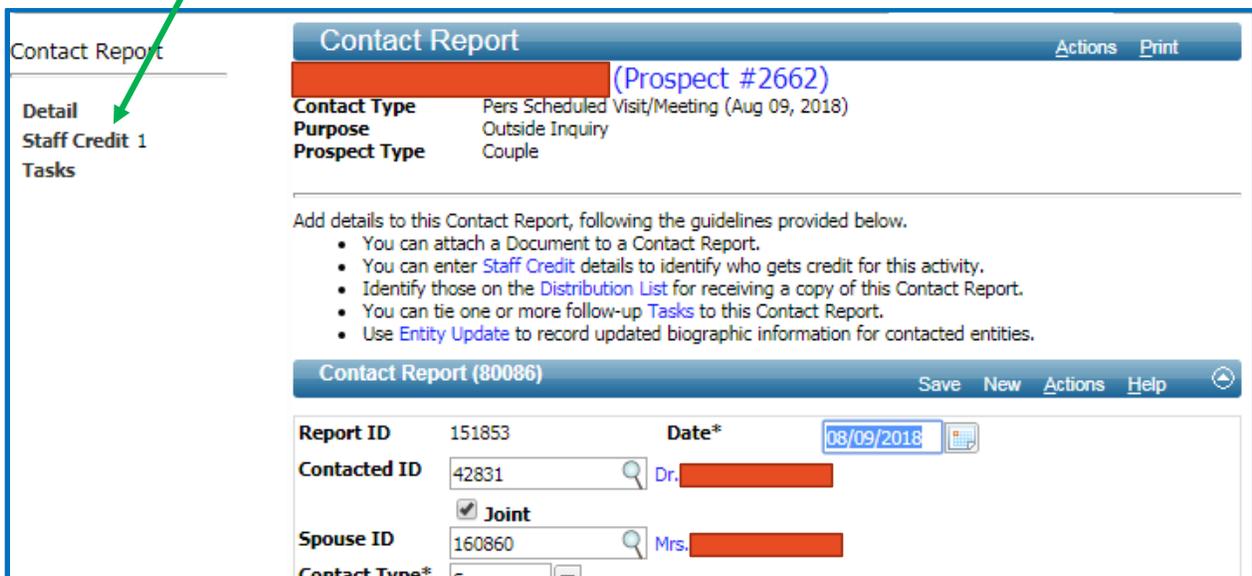
## Give Staff Credit

Ver. 1.3

12 December 2018

*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.



The screenshot shows a web application interface for a 'Contact Report'. On the left is a navigation tree with 'Detail', 'Staff Credit 1', and 'Tasks'. A green arrow points from the text 'Choose Staff Credit' to the 'Staff Credit 1' option. The main content area has a blue header 'Contact Report' with 'Actions' and 'Print' links. Below the header, there's a red bar with '(Prospect #2662)'. The main content area contains a form with fields for 'Contact Type' (Pers Scheduled Visit/Meeting (Aug 09, 2018)), 'Purpose' (Outside Inquiry), and 'Prospect Type' (Couple). Below the form is a list of instructions: 'Add details to this Contact Report, following the guidelines provided below.' followed by four bullet points. At the bottom of the screenshot, there's another blue bar with 'Contact Report (80086)' and 'Save New Actions Help' links.

2. Select [New](#) from the [Contact Report Credit](#) blue bar.



The screenshot shows a blue bar with the text 'Contact Report Credit (80080) (1/1)' on the left and 'Save New Actions Help' on the right. A green arrow points from the text 'Select New from the Contact Report Credit blue bar.' to the 'New' button.

# Development Officer Handbook

Ver. 1.3

12 December 2018

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

Person Credited	Author	Credit	Participation
ARNG(Ret)	<input checked="" type="checkbox"/> Author	Visits	

Staff\*

Credit Type\*

Participation

Unit  University Development

Comment

- Staff\***
    - Enter staff member that attended meeting and should receive credit.
  - 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.
  - Participation**
    - Specify **Participated** or **Provided Introduction**.
  - Unit**
    - Choose staff member's unit.
  - Comment**
    - Use Comment for any clarifying notes.
- Click **Save** from the **Contact Report Credit** blue bar.



---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

5. Your screen should look like this:

The screenshot displays a software interface for managing contact report credits. The title bar reads "Contact Report Credit (80080) (2/2)" and includes "Save", "Actions", and "Help" buttons. Below the title bar is a table with the following columns: "Person Credited", "Author", "Credit", and "Participation". The table contains two rows of data. The first row shows a redacted name, "NG(Ret)", with a checked "Author" box, "Visits" in the "Credit" column, and an empty "Participation" column. The second row shows the same redacted name, an unchecked "Author" box, "Visits" in the "Credit" column, and "Participated" in the "Participation" column. Below the table is a form with the following fields: "Staff\*" with a search box containing "97029" and a dropdown showing "Ms. [Redacted]"; "Credit Type\*" with a dropdown set to "3" and "Visits" listed; "Participation" with a dropdown set to "A" and "Participated" listed; "Unit" with a dropdown set to "UDE" and "University Development" listed; and a "Comment" text area.

Person Credited	Author	Credit	Participation
[Redacted] NG(Ret)	<input checked="" type="checkbox"/> Author	Visits	
[Redacted] NG(Ret)	<input type="checkbox"/> Author	Visits	Participated

**Staff\*** 97029    Ms. [Redacted]  
**Credit Type\*** 3  Visits  Author  
**Participation** A  Participated  
**Unit** UDE  University Development  
**Comment**

# Development Officer Handbook

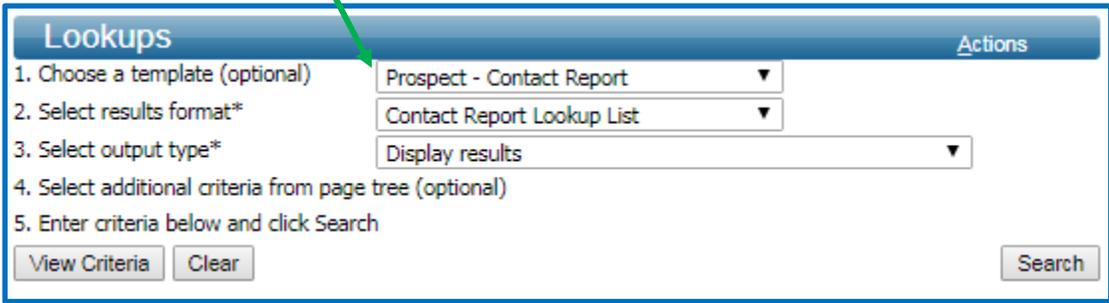
## View Contact Reports

Ver. 1.3

12 December 2018

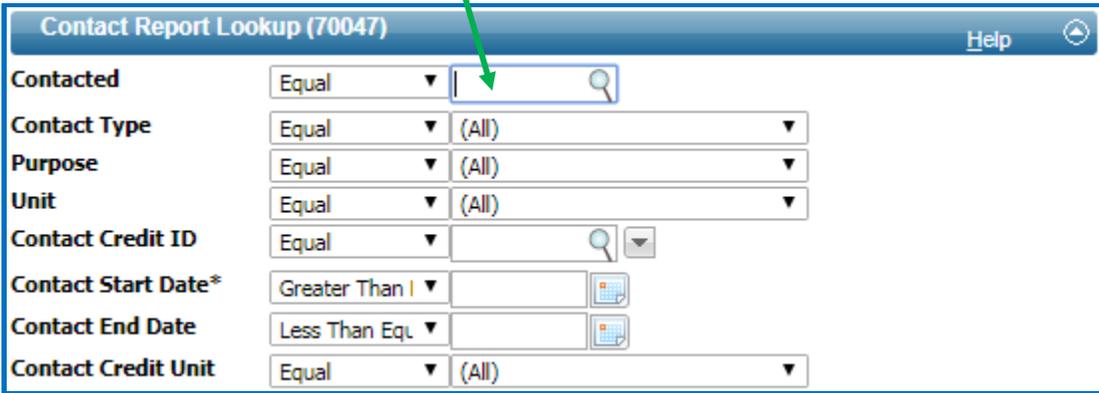
### FINDING ALL CONTACT REPORTS FOR A SINGLE ENTITY

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



Lookups		Actions
1. Choose a template (optional)	Prospect - Contact Report	
2. Select results format*	Contact Report Lookup List	
3. Select output type*	Display results	
4. Select additional criteria from page tree (optional)		
5. Enter criteria below and click Search		
<input type="button" value="View Criteria"/>	<input type="button" value="Clear"/>	<input type="button" value="Search"/>

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.



Contact Report Lookup (70047)		Help	
Contacted	Equal		<input type="text"/>
Contact Type	Equal	(All)	
Purpose	Equal	(All)	
Unit	Equal	(All)	
Contact Credit ID	Equal		<input type="text"/>
Contact Start Date*	Greater Than		<input type="text"/>
Contact End Date	Less Than Eq		<input type="text"/>
Contact Credit Unit	Equal	(All)	

# Development Officer Handbook

Ver. 1.3

12 December 2018

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.**

The screenshot shows a web form titled "Contact Report Lookup (70047)". It contains several fields with dropdown menus and search icons:

- Contacted:** Equal (dropdown), [text input]
- Contact Type:** Equal (dropdown), (All) (dropdown)
- Purpose:** Equal (dropdown), (All) (dropdown)
- Unit:** Equal (dropdown), (All) (dropdown)
- Contact Credit ID:** Equal (dropdown), [text input]
- Contact Start Date\*:** Greater Than (dropdown), [text input]
- Contact End Date:** Less Than Eq (dropdown), [text input]
- Contact Credit Unit:** Equal (dropdown), (All) (dropdown)

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

This is a close-up of the "Contact Start Date\*" field. The dropdown menu is set to "Greater Than", and the date "01/01/2017" is entered in the text box. A green arrow points to the date input.

6. Click “Search.”

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

<b>Date</b>	08/03/2017	<b>Type</b>	Campus Visit/Meeting
<b>Contacted</b>	<a href="#">Ronald McDonald House Charities</a>	<b>Purpose</b>	Sponsorship
<b>Credit</b>	2 credit entities	<b>Unit</b>	University Development
<b>Prospect Name</b>	Ronald McDonald House Charities(6488; Fayetteville Campus )	<b>Author</b>	<a href="#">[redacted] ARNG(Ret)</a>
<b>Description</b>	Campus visit with Mr. McDonald		

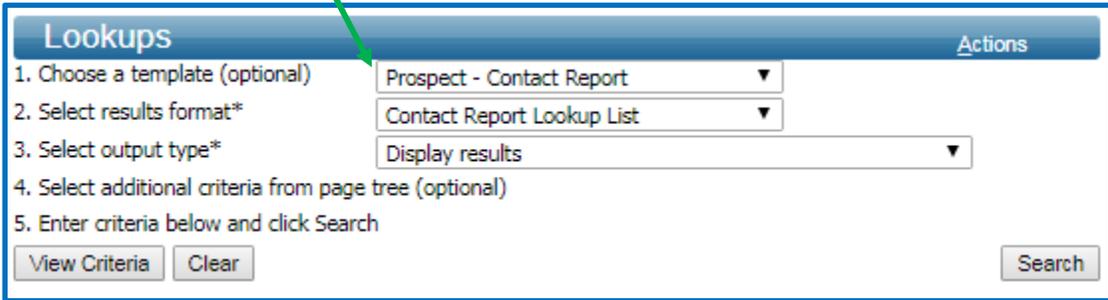
# Development Officer Handbook

Ver. 1.3

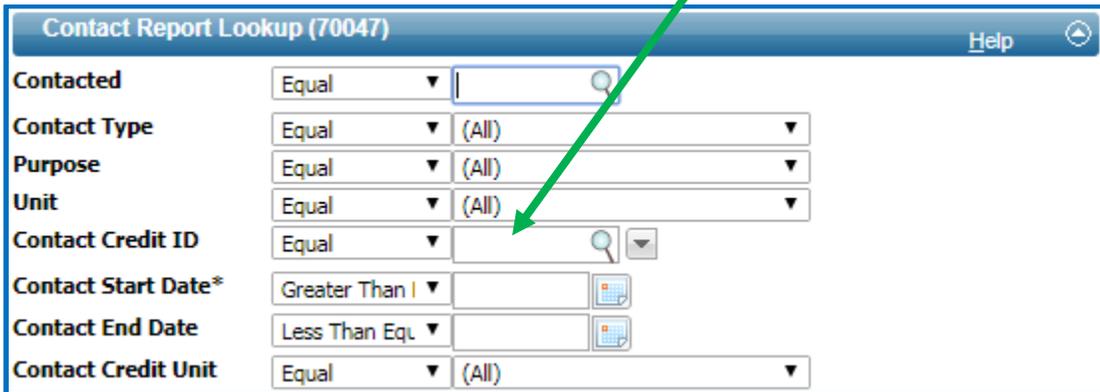
12 December 2018

## 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.



# Development Officer Handbook

Ver. 1.3

12 December 2018

12. Your screen should look like this:

The screenshot displays a software interface for performing lookups. It is divided into two main sections: "Contact Report Lookup (70047)" and "Assignment Lookup (70100)".

**Lookups Section:**

- 1. Choose a template (optional): Prospect - Contact Report
- 2. Select results format\*: Contact Report Lookup List
- 3. Select output type\*: Display results
- 4. Select additional criteria from page tree (optional)
- 5. Enter criteria below and click Search

Buttons: View Criteria, Clear, Search

**Contact Report Lookup (70047) Section:**

- Contacted: Equal [ ]
- Contact Type: Equal (All)
- Purpose: Equal (All)
- Unit: Equal (All)
- Contact Credit ID: Equal 568219 [ ]
- Contact Start Date\*: Greater Than | 01/01/2016 [ ]
- Contact End Date: Less Than Equ [ ]
- Contact Credit Unit: Equal (All)

**Assignment Lookup (70100) Section:**

- Assignment Type: Equal (All)
- Assign Status: Equal (All)
- Assign ID: Equal [ ]
- Priority: Equal (All)
- Unit: Equal (All)

A green arrow points from the bottom left towards the Search button in the top right of the interface.

13. Click "Search."

# Development Officer Handbook

Ver. 1.3

12 December 2018

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

**MAKE SURE  
YOU HAVE  
SAVED YOUR  
WORK!**



# Record a Proposal In Contact Reports

# Development Officer Handbook

Ver. 1.3

12 December 2018

1. Select a **Contact Type**.

The screenshot shows a web-based form titled "Contact Report (80086)". The form has a blue header bar with "Save", "Actions", and "Help" buttons. The main content area is white with a light blue border. It contains several fields: "Report ID" (0), "Date\*" (10/15/2018), "Contacted ID" (197264), "Spouse ID" (197088), "Contact Type\*" (S), "Purpose\*" (K), "Unit" (UDE), "Author\*" (197264), and "Description\*" (\$1M Student Success Center Building). Below the description is a "Text" field containing "\$1M Student Success Center Building - 5yr Pledge, \$200K per year Co-Solicitation with Ben Carter" and "Enter regular ROC details". A red arrow points to the "Contact Type\*" dropdown menu.

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)

# Development Officer Handbook

Ver. 1.3

12 December 2018

### 3. Select an AUTHOR

a. If there is a co-solicitor, select **Staff Credit**

Contact Report

Detail  
Staff Credit 1  
Tasks

Contact Report #197264

Contact Type: Pers Scheduled Visit/Meeting (Oct 15, 2018)  
Purpose: Solicitation Ask

Add details to this Contact Report, following the guidelines provided below.

- You can attach a Document to a Contact Report.
- You can enter **Staff Credit** details to identify who gets credit for this activity.
- Identify those on the [Distribution List](#) for receiving a copy of this Contact Report.
- You can tie one or more follow-up [Tasks](#) to this Contact Report.
- Use [Entity Update](#) to record updated biographic information for contacted entities.

Contact Report (80086)

Report ID: 155359 Date\*: 10/15/2018

Contacted ID: 197264

Joint

Spouse ID: 197088 Mrs. F. [REDACTED]

Contact Type\*: S Pers Scheduled Visit/Meeting

Purpose\*: K Solicitation Ask

Unit: UDE University Development

Author\*: 197264 [REDACTED]

Description\*: \$100,000 Advance Arkansas Scholarship in Fulbright

Text: \$100,000 Advance Arkansas Scholarship in Fulbright - Outright gift  
Enter regular ROC details

Program: [REDACTED]

Prospect ID: [REDACTED]

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

# Development Officer Handbook

Ver. 1.3

12 December 2018

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

**Contact Report (80086)** Save Actions Help

Report ID: 0 Date\*: 10/15/2018

Contacted ID: 197264

Joint

Spouse ID: 197088 Mrs. R

Contact Type\*: S Pers Scheduled Visit/Meeting

Purpose\*: K Solicitation Ask

Unit: UDE University Development

Author\*: 197264 Mr. R

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

## 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

# Development Officer Handbook

Ver. 1.3

12 December 2018

## Examples of Completed Proposal ROCs

### Solicitation Ask - Example with a Co-Solicitation Manager

The screenshot shows a web-based form titled "Contact Report (80086)". The form contains the following fields and values:

- Report ID:** 0
- Date\*:** 10/15/2018
- Contacted ID:** 197264
- Joint:**
- Spouse ID:** 197088
- Contact Type\*:** S (Pers Scheduled Visit/Meeting)
- Purpose\*:** K (Solicitation Ask)
- Unit:** UDE (University Development)
- Author\*:** 197264
- 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

# Development Officer Handbook

Ver. 1.3

12 December 2018

## Solicitation Accepted Example

Contact Report (80086)		Save	New	Actions	Help
Report ID	155357	Date*	10/22/2018		
Contacted ID	197264				
	<input checked="" type="checkbox"/> Joint				
Spouse ID	197088	Mrs.			
Contact Type*	T	Phone Call			
Purpose*	N	Solicitation Accepted			
Unit	UDE	University Development			
Author*	197264	M			
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			
	<input checked="" type="checkbox"/> Joint				
Spouse ID	197088	Mrs.			
Contact Type*	T	Phone Call			
Purpose*	Q	Solicitation Declined			
Unit	UDE	University Development			
Author*	197264	M			
Description*	Declined \$1M Student Success Center Building				
Text	Declined \$1M Student Success Center Building  Enter regular ROC details				

# Development Officer Handbook

Ver. 1.3

12 December 2018

## Solicitation Ask Example

<b>Report ID</b>	155359	<b>Date*</b>	10/15/2018
<b>Contacted ID</b>	197264		
	<input checked="" type="checkbox"/> <b>Joint</b>		
<b>Spouse ID</b>	197088	Mrs	
<b>Contact Type*</b>	S		Pers Scheduled Visit/Meeting
<b>Purpose*</b>	K		Solicitation Ask
<b>Unit</b>	UDE		University Development
<b>Author*</b>	197264	Mr	
<b>Description*</b>	\$100,000 Advance Arkansas Scholarship in Fulbright		
<b>Text</b>	\$100,000 Advance Arkansas Scholarship in Fulbright - Outright gift Enter regular ROC details		

## Solicitation Accepted - Example with Funding Lower than Ask Amount

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

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

## Solicitation Declined Example

<b>Report ID</b>	155361	<b>Date*</b>	10/23/2018
<b>Contacted ID</b>	197264		
	<input checked="" type="checkbox"/> <b>Joint</b>		
<b>Spouse ID</b>	197088	Mrs	
<b>Contact Type*</b>	T		Phone Call
<b>Purpose*</b>	Q		Solicitation Declined
<b>Unit</b>	UDE		University Development
<b>Author*</b>	197264		
<b>Description*</b>	Declined \$100,000 Advance Arkansas Scholarship in Fulbright		
<b>Text</b>	Declined \$100,000 Advance Arkansas Scholarship in Fulbright Enter regular ROC details		

**MAKE SURE  
YOU HAVE  
SAVED YOUR  
WORK!**



---

*Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

# Tasks

# Development Officer Handbook

Ver. 1.3

12 December 2018

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.

Contact Report

Prospect #2662

Contact Type: Pers Scheduled Visit/Meeting (Aug 09, 2018)  
Purpose: Outside Inquiry  
Prospect Type: Couple

Add details to this Contact Report, following the guidelines provided below.

- You can attach a Document to a Contact Report.
- You can enter Staff Credit details to identify who gets credit for this activity.
- Identify those on the Distribution List for receiving a copy of this Contact Report.
- You can tie one or more follow-up Tasks to this Contact Report.
- Use Entity Update to record updated biographic information for contacted entities.

Contact Report (80086)

Save New Actions Help

Report ID: 151853 Date\*: 08/09/2018

Contacted ID: 42831

Joint

Spouse ID: 160860

Contact Type\*: S Pers Scheduled Visit/Meeting

Purpose\*: O Outside Inquiry

Unit: UDE University Development

Author\*: 667652

Description\*: Meeting to discuss Campus Bounce Houses

Text: I met [redacted] at McDonalds to discuss the recent Bounce House initiative...

Program: [redacted]

Prospect ID: 2662

Proposal ID: 19408

Name\*: [redacted]

Sort Name\*: [redacted]

Title/Addr: [redacted]

**[Skip to page 24 of this Manual](#)**

# Development Officer Handbook

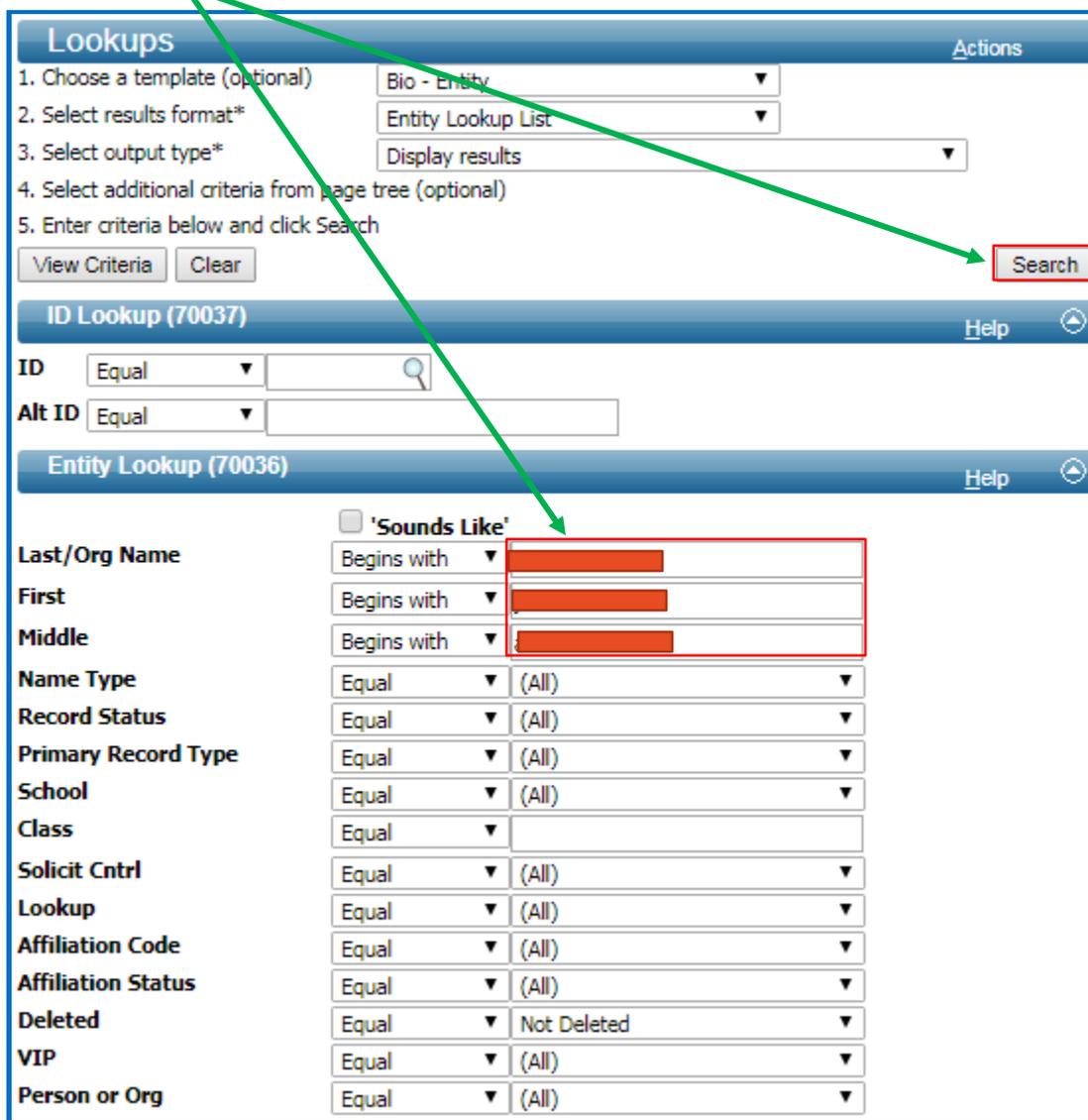
Ver. 1.3

12 December 2018

## Method 2: Use the Lookup Tool

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

1. **Search** for the Entity first.



**Lookups** Actions

1. Choose a template (optional)

2. Select results format\*

3. Select output type\*

4. Select additional criteria from page tree (optional)

5. Enter criteria below and click Search

---

**ID Lookup (70037)** Help

ID

Alt ID

---

**Entity Lookup (70036)** Help

'Sounds Like'

Last/Org Name	Begins with	<input type="text" value=""/>
First	Begins with	<input type="text" value=""/>
Middle	Begins with	<input type="text" value=""/>
Name Type	Equal	<input type="text" value="(All)"/>
Record Status	Equal	<input type="text" value="(All)"/>
Primary Record Type	Equal	<input type="text" value="(All)"/>
School	Equal	<input type="text" value="(All)"/>
Class	Equal	<input type="text" value=""/>
Solicit Cntrl	Equal	<input type="text" value="(All)"/>
Lookup	Equal	<input type="text" value="(All)"/>
Affiliation Code	Equal	<input type="text" value="(All)"/>
Affiliation Status	Equal	<input type="text" value="(All)"/>
Deleted	Equal	<input type="text" value="Not Deleted"/>
VIP	Equal	<input type="text" value="(All)"/>
Person or Org	Equal	<input type="text" value="(All)"/>

# Development Officer Handbook

Ver. 1.3

12 December 2018

2. Click on the Entity's link.

The screenshot shows a web interface for 'Lookup Results'. At the top, it says 'Items 1 to 7 of 12' with navigation buttons and 'New Search' and 'Refine Search' buttons. Below that is a header for 'Entity Lookup List (50401) (1/12)' with 'Actions' and 'Help' links. The main content is a list of entities, each with a redacted name, a date in parentheses, and an address. The fourth entry is highlighted with a red box and has a green arrow pointing to its name field.

Entity Name	Date	Address
[Redacted]	12/05/1939 (78)	11 South Sechrest Circle Rogers, AR 72758-1405
[Redacted] Law 1973)	12/05/1989	
[Redacted] 3)	12/05/1989	
[Redacted] ineering 1962)	12/05/1939 (78)	11 South Sechrest Circle Rogers, AR 72758-1405
[Redacted] 4/03/1958 (60)		5454 South Elmira Avenue Springfield, MO 65810-2703
[Redacted] 962)		4550 Liberty Ridge De Soto, MO 63020-3276
[Redacted]		4550 Liberty Ridge De Soto, MO 63020-3276

# Development Officer Handbook

Ver. 1.3

12 December 2018

3. From the **Entity Overview**.

**Entity Overview** Actions Print

**1** \*\*\*VIP\*\*\*

**Rec Type** Alumni (1962 Engineering), Faculty, More... 12/05/1939 (78)

**Degree** BSIE 1962 Engineering [More...](#)

**PM Manager** [Redacted]

**AAA** Life A+ Northwest Arkansas Chapter  
Married to: Mrs. [Redacted] Towers Old Main Accepted (Gold)

**Contact Information (50100)** Actions Help

**Home (Preferred)**  
11 South Sechrest Circle  
Rogers, AR 72758-1405  
(479) 464-7183 (Home, Pref)

**Business**  
Distinguished Professor  
University of Arkansas  
Industrial Engineering  
ENGR 308  
Fayetteville, AR 72701-1201  
(479) 575-2773 (Business)

[Redacted] (Business, Pref)

**Other Active Telephone Info (100503) (0)** Actions Help

**Committee Participation (100400) (2)** Actions Help

Committee	Status	Role	Start	Stop
Arkansas Academy of Ind. En...	Active		1987	
Arkansas World Trade Center	Active			

**Prospect Summary (50104) (1)** New Actions Help

**Name** [Redacted], Current Prospect - Active

**Type** Couple **Start Date** 07/07/1999

**Group** Fayetteville Campus **Stop Date**

**Stage** Closing

**Trans GR**

**Primary Manager** [Redacted]

**Affiliations (50103) (7)** Actions Help

Affiliation	Status	Record Type	Affil Year
Chancellor Emeritus	Active		
Distinguished Professors	Active		
Emeritus	Active		

**Primary Credit Giving Summary (100010)** Actions Help

Credit	Hard Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
--------	-------------------	----------------	---------------------	----------------------	-------

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

Prospect Summary (50104)

# Development Officer Handbook

Ver. 1.3

12 December 2018

- Click on the Prospect identified under the blue bar.

Prospect Summary (50104) (1) New Actions Help

Name	J [redacted] ve), Current Prospect - Active		
Type	Couple	Start Date	07/07/1999
Group	Fayetteville Campus	Stop Date	
Stage	Closing		
Trans GR			
Primary Manager	[redacted]		

- Once you have found the **Prospect Overview...**
- Click on **Tasks** from the Nav Tree.

Prospect Overview Actions Print

John A. & Mary Lib White (Prospect #2662)  
Prospect Type Couple

Prospect Entities (50136) (2) Actions Help

Entity	Primary
[redacted]	<input type="checkbox"/> Primary
[redacted]	<input checked="" type="checkbox"/> Primary

Prospect Overview (70071) Actions Help

Active

Name	[redacted]
Stage	Closing
Start	07/07/1999
Stop	
Type	Couple
Continuum	
Group	Fayetteville Campus
Affiliation	
Campaign	
Trans GR	
Rating Status	
Expectation	0.00
Comment	

Prospect Assignments (50135) (8) Actions Help

Prospect

- Overview
- Detail
- Assignments 8
- Categories
- Contact Rpts 33
- Contacts
- Entities 2
- Evaluations 2
- Notes
- Programs 1
- Proposals 13
- Stages 24
- Tasks 2**
- Transactions 9

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

## 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

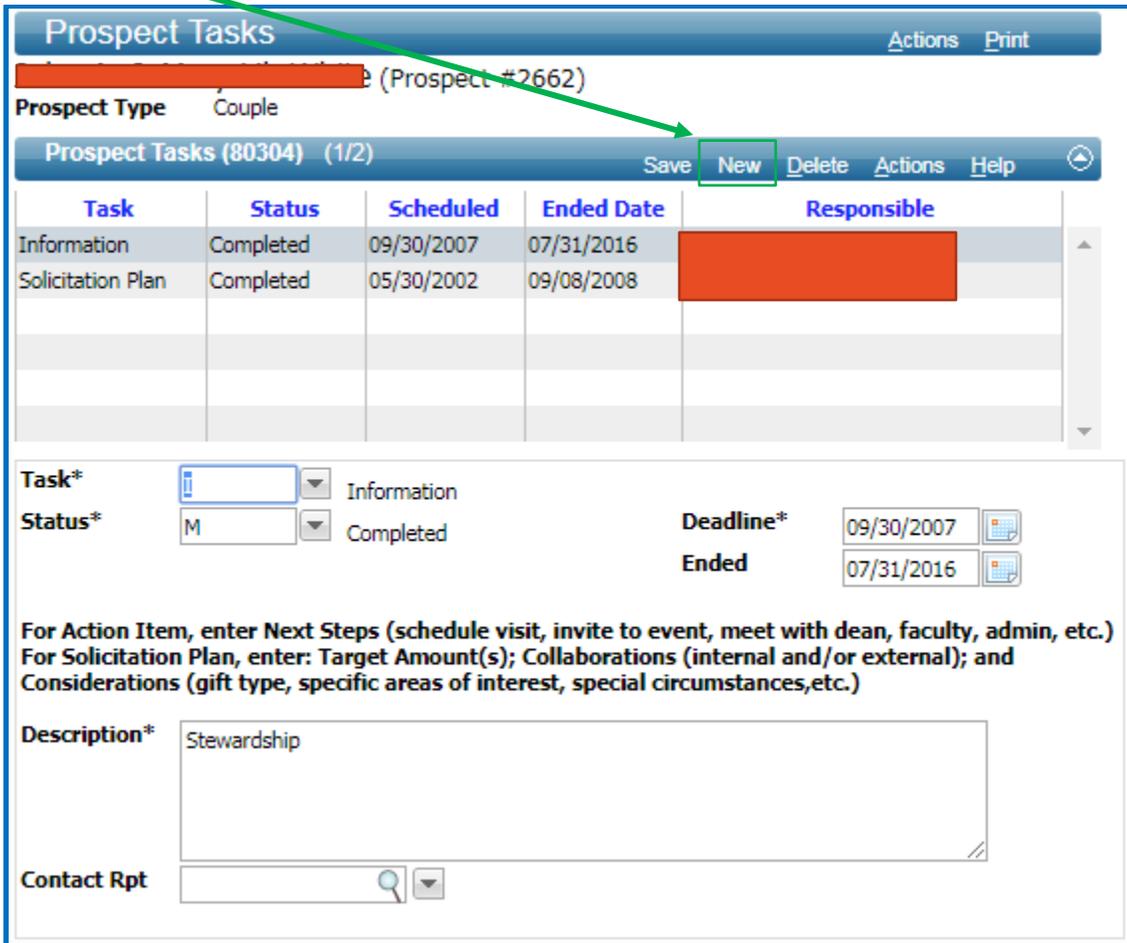
# Development Officer Handbook

Ver. 1.3

12 December 2018

## Create a Task

1. Select **New** from the Prospect Tasks blue bar.



The screenshot shows the 'Prospect Tasks' interface. At the top, there is a blue bar with 'Prospect Tasks' and 'Actions Print'. Below this, there is a red bar with '(Prospect #2662)'. The 'Prospect Type' is 'Couple'. Below that, there is another blue bar with 'Prospect Tasks (80304) (1/2)' and buttons for 'Save', 'New', 'Delete', 'Actions', and 'Help'. A green arrow points to the 'New' button. Below the blue bar is a table with columns: Task, Status, Scheduled, Ended Date, and Responsible. The table contains two rows: 'Information' (Completed, 09/30/2007, 07/31/2016) and 'Solicitation Plan' (Completed, 05/30/2002, 09/08/2008). Below the table is a form for creating a new task. The form has fields for 'Task\*' (dropdown menu), 'Status\*' (dropdown menu), 'Deadline\*' (date picker), and 'Ended' (date picker). The 'Task\*' field is set to 'Information' and 'Status\*' is set to 'Completed'. The 'Deadline\*' field is set to '09/30/2007' and 'Ended' is set to '07/31/2016'. Below the form, there is a text area for 'Description\*' with the text 'Stewardship'. At the bottom, there is a 'Contact Rpt' field with a search icon and a dropdown menu.

Task	Status	Scheduled	Ended Date	Responsible
Information	Completed	09/30/2007	07/31/2016	
Solicitation Plan	Completed	05/30/2002	09/08/2008	

**Task\*** Information  
**Status\*** Completed  
**Deadline\*** 09/30/2007  
**Ended** 07/31/2016

**Description\*** Stewardship

**Contact Rpt**

# Development Officer Handbook

Ver. 1.3

12 December 2018

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

Task	Status	Scheduled	Ended Date	Responsible
Action Item	Pending	09/06/2018		[Redacted] #532188
Information	Completed	09/30/2007	07/31/2016	[Redacted]
Solicitation Plan	Completed	05/30/2002	09/08/2008	[Redacted]

Task\*

Status\*

Deadline\*

Ended

For Action Item, enter Next Steps (schedule visit, invite to event, meet with dean, faculty, admin, etc.)  
For Solicitation Plan, enter: Target Amount(s); Collaborations (internal and/or external); and Considerations (gift type, specific areas of interest, special circumstances,etc.)

Description\*

Responsible

Contact Rpt

## 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.

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

- 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:

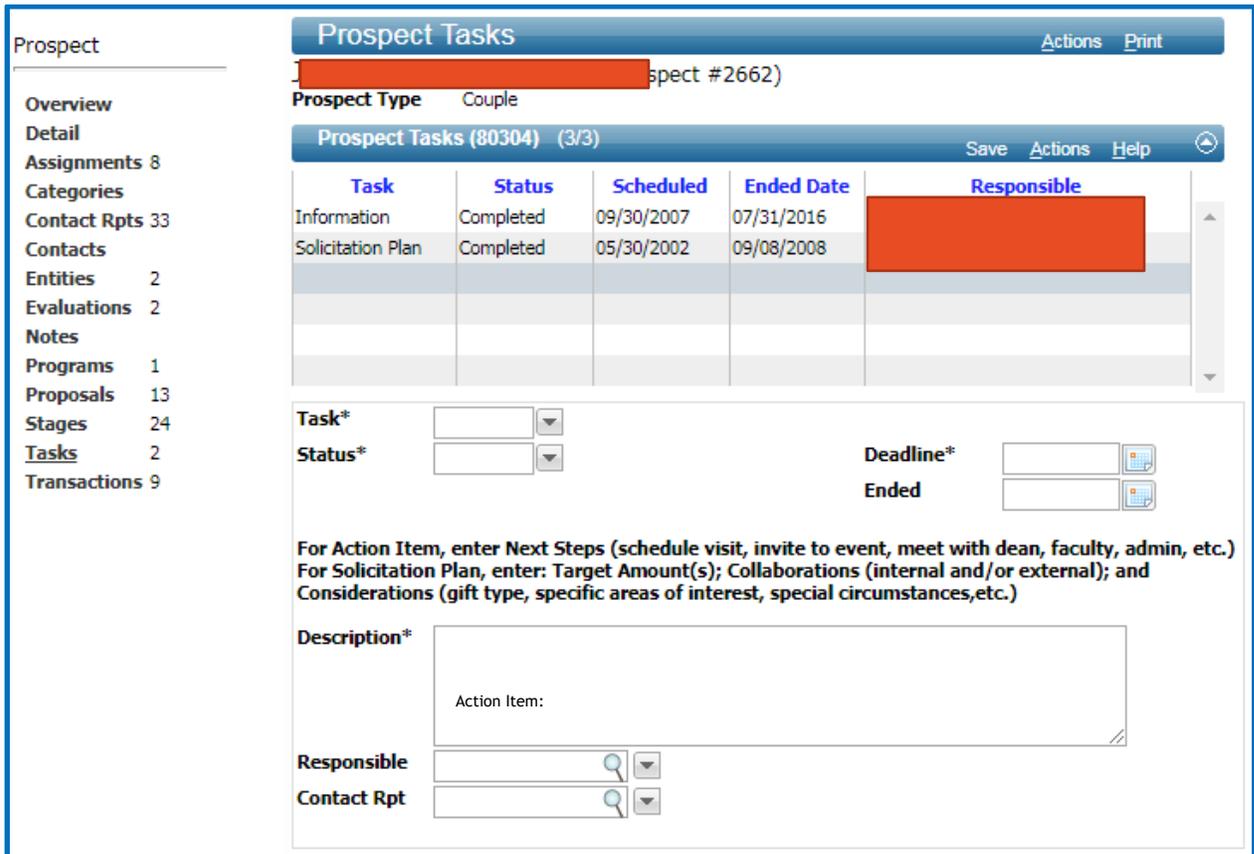
* Schedule Visit	*Invite to Event
* Meet with Dean	*Etc.

# Development Officer Handbook

Ver. 1.3

12 December 2018

- 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  from the blue bar.
  5. Advance should look something like this:



Prospect Tasks

Prospect #2662

Prospect Type Couple

Prospect Tasks (80304) (3/3)

Task	Status	Scheduled	Ended Date	Responsible
Information	Completed	09/30/2007	07/31/2016	
Solicitation Plan	Completed	05/30/2002	09/08/2008	

Task\*

Status\*

Deadline\*

Ended

For Action Item, enter Next Steps (schedule visit, invite to event, meet with dean, faculty, admin, etc.)  
For Solicitation Plan, enter: Target Amount(s); Collaborations (internal and/or external); and Considerations (gift type, specific areas of interest, special circumstances,etc.)

Description\*

Responsible

Contact Rpt

# Development Officer Handbook

Ver. 1.3

12 December 2018

**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.

The screenshot shows two overlapping application windows. The top window is titled "Prospect Tasks" and contains a table with columns: Task, Status, Scheduled, Ended Date, and Responsible. Below the table are form fields for Task\*, Status\*, Deadline\*, and Ended. The bottom window is titled "Tasks Responsible (80338) (1/1)" and has a blue header bar with "Save", "New", "Actions", and "Help" buttons. A green arrow points from the "New" button in the bottom window's blue bar to the "New" button in the top window's blue bar. A red arrow points from a callout box labeled "CLICK HERE!" to the "New" button in the bottom window's blue bar.

Task	Status	Scheduled	Ended Date	Responsible
Information	Completed	09/30/2007	07/31/2016	
Solicitation Plan	Completed	05/30/2002	09/08/2008	

Task\*: Information  
Status\*: Completed  
Deadline\*: 09/30/2007  
Ended: 07/31/2016

Description\*: Stewardship

Tasks Responsible (80338) (1/1)  
Save **New** Actions Help

ID\*: 20798

---

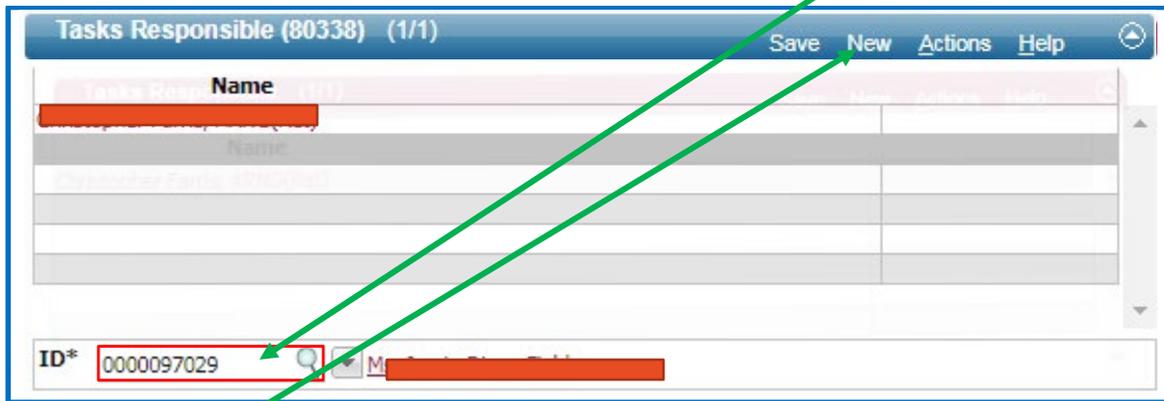
## Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



The screenshot shows a web application interface for 'Tasks Responsible (80338) (1/1)'. At the top is a blue navigation bar with buttons for 'Save', 'New', 'Actions', and 'Help'. Below this is a table with a header row containing 'Name' and 'Name' columns. The first row of the table is highlighted in orange. Below the table is an 'ID\*' field containing the value '0000097029'. A red box highlights the 'ID\*' field and a magnifying glass icon to its right. A green arrow points from the magnifying glass icon to the 'Save' button in the blue header bar.

9. Click  in the **Tasks Responsible** blue bar.

# Development Officer Handbook

Ver. 1.3

12 December 2018

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

**Prospect Tasks** Actions Print

John A. & Mary Lib White (Prospect #2662)  
Prospect Type Couple

Save completed successfully

Prospect Tasks (80304) (1/2) Save New Delete Actions Help

Task	Status	Scheduled	Ended Date	Responsible
Information	Completed	09/30/2007	07/31/2016	Multiple (2)
Solicitation Plan	Completed	05/30/2002	09/08/2008	

Task\* I Information  
Status\* M Completed  
Deadline\* 09/30/2007  
Ended 07/31/2016

For Action Item, enter Next Steps (schedule visit, invite to event, meet with dean, faculty, admin, etc.)  
For Solicitation Plan, enter: Target Amount(s); Collaborations (internal and/or external); and Considerations (gift type, specific areas of interest, special circumstances, etc.)

Description\* Stewardship

Contact Rpt

Tasks Responsible (80338) (2/2) Save New Actions Help

Name
Dr. [REDACTED]
Ms. [REDACTED]

ID\* 97029 Ms. J. [REDACTED]

**MAKE SURE  
YOU HAVE  
SAVED YOUR  
WORK!**



# How to Use Crystal Reports

# Development Officer Handbook

Ver. 1.3

12 December 2018

**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.

The screenshot shows the website for University Advancement, Information and Technology Services. The page includes a navigation bar with 'HOME FEATURES OFFICES ABOUT DIRECTORY' and a 'GIVE TODAY!' button. The main content area features a 'Quick Links' section with a list of links, including 'Crystal Reports on the EDGE Server' which is highlighted with a green box and a green arrow. Other sections include 'Request Forms' and 'Training Documents'.

**University Advancement**  
HOME FEATURES OFFICES ABOUT DIRECTORY

**Information and Technology Services**  
U of A / University Advancement / Offices / Information and Technology Services

Information and Technology Services is responsible for University Advancement information data systems and user computing hardware and software.

The information or data side includes all on-line system maintenance, security, training, and data retrieval. Its main duties include ID setup, security, and training for on-line systems including Advance, Crystal Reports Server, NOS and Blackbaud; database and on-line system upgrades and enhancements for Advance, CRS, and the NOS; data imports and exports to and from other systems; and data retrieval and distribution from all data systems involved. We are here to help.

**Quick Links**

- [Advance for General Users](#)
- [Advance for Central Development Users](#)
- [Advance for Alumni Association Users](#)
- [Advance TRAIN \(For Training Purposes\)](#)
- [Crystal Reports on the EDGE Server](#)
- [Blackbaud](#)

**Request Forms**

- [Report Request Form](#)
- [Advance/Crystal Reports ID Request Form](#)
- [NOSS- Notice of Student Support ID Request Form](#)
- [Blackbaud ID Request Form](#)

**Training Documents**

- [Advanced](#)
- [BlackBaud](#)
- [Crystal](#)
- [How to files](#)
- [Notice of Student Support](#)
- [Training Overview](#)

**STAFF**

Jamie Dixon Director <a href="mailto:jamiee@uark.edu">jamiee@uark.edu</a> 479-575-6745	Tate Neyman Systems Analyst <a href="mailto:cneyman@uark.edu">cneyman@uark.edu</a> 479-575-5626	Caleb Mikles Report Writer <a href="mailto:jmikles@uark.edu">jmikles@uark.edu</a> 479-575-3520	Daniel V. McClelland Systems Analyst <a href="mailto:dvmcclel@uark.edu">dvmcclel@uark.edu</a> 479-575-3530	Joshua Tipton Report Writer <a href="mailto:tjptonj@uark.edu">tjptonj@uark.edu</a> 479-575-3516	Christopher M. Farris Trainer & Security Officer <a href="mailto:cmfarris@uark.edu">cmfarris@uark.edu</a> 479-575-4135
---	--	---	---	--	--

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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

**SAP BusinessObjects**  
BI launch pad

Enter your user information, and click "Log On".  
If you are unsure of your account information, contact your system administrator.

System: UARFDNPRPT1:6400  
User Name:   
Password:

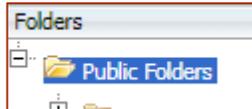
[Log On](#)

 [Help](#)

# Development Officer Handbook

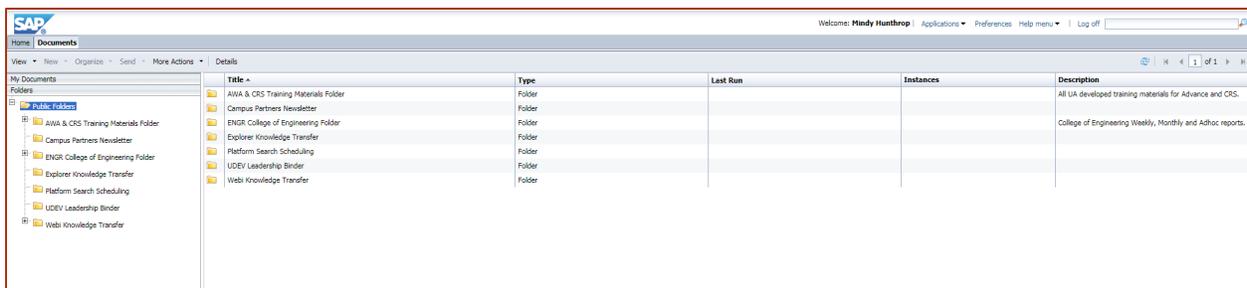
Ver. 1.3

12 December 2018



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.**



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](http://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.

---

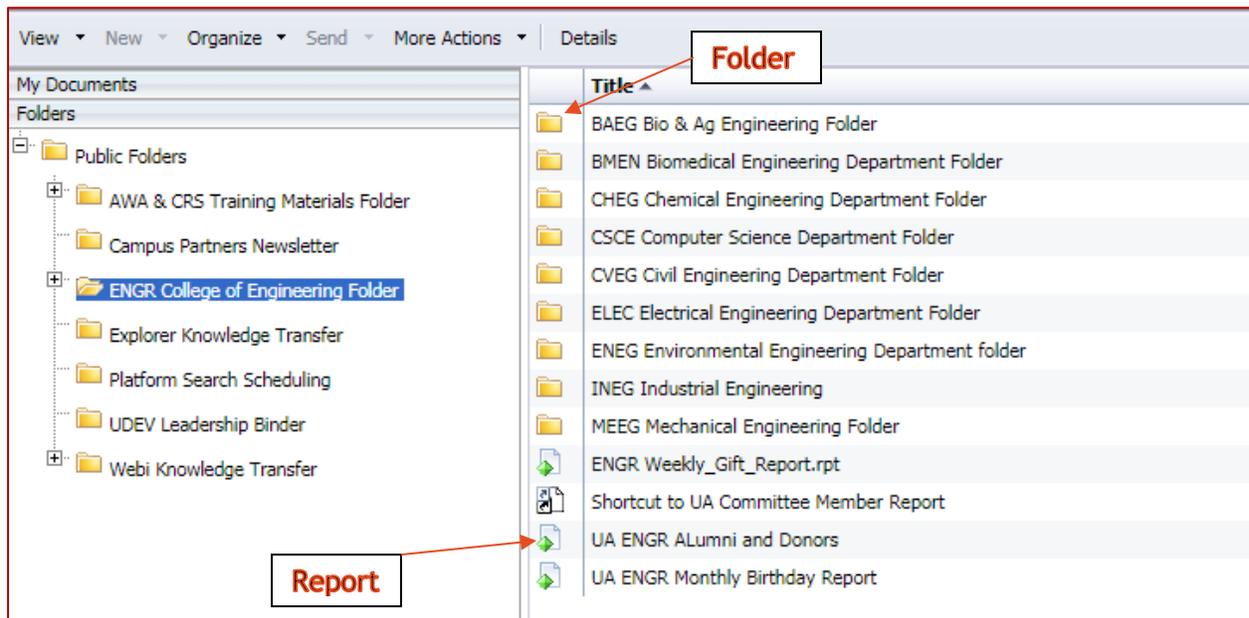
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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.*

---

---

# Development Officer Handbook

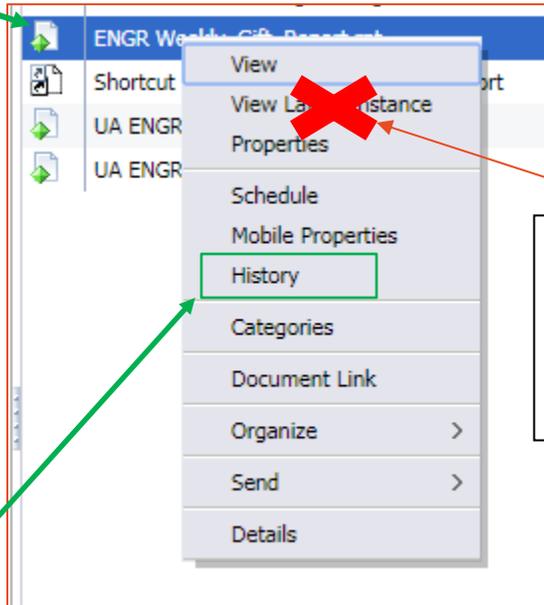
Ver. 1.3

12 December 2018

---

## 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.

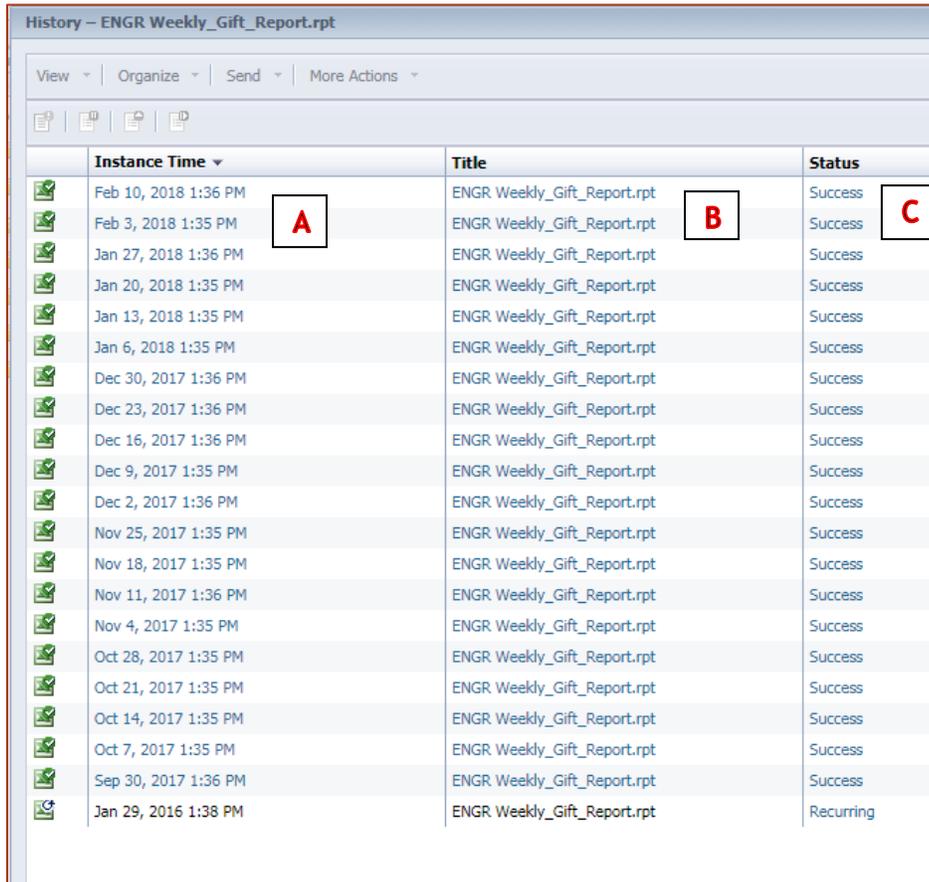
# Development Officer Handbook

Ver. 1.3

12 December 2018

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.



	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



---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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)



---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

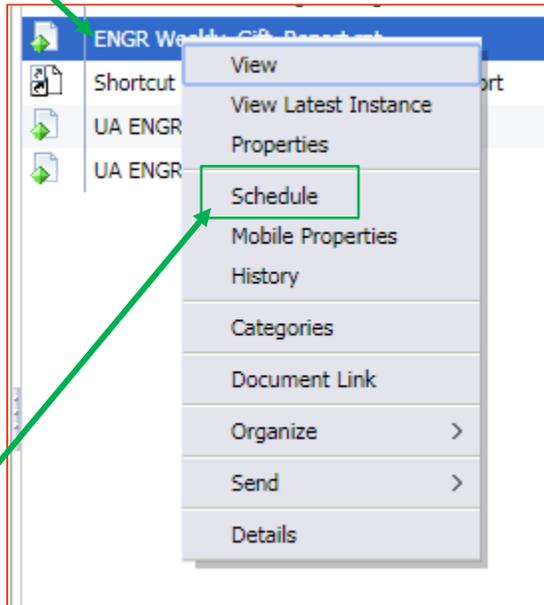
## How to Run an Existing Report with (or without) Changed Parameters

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.

---

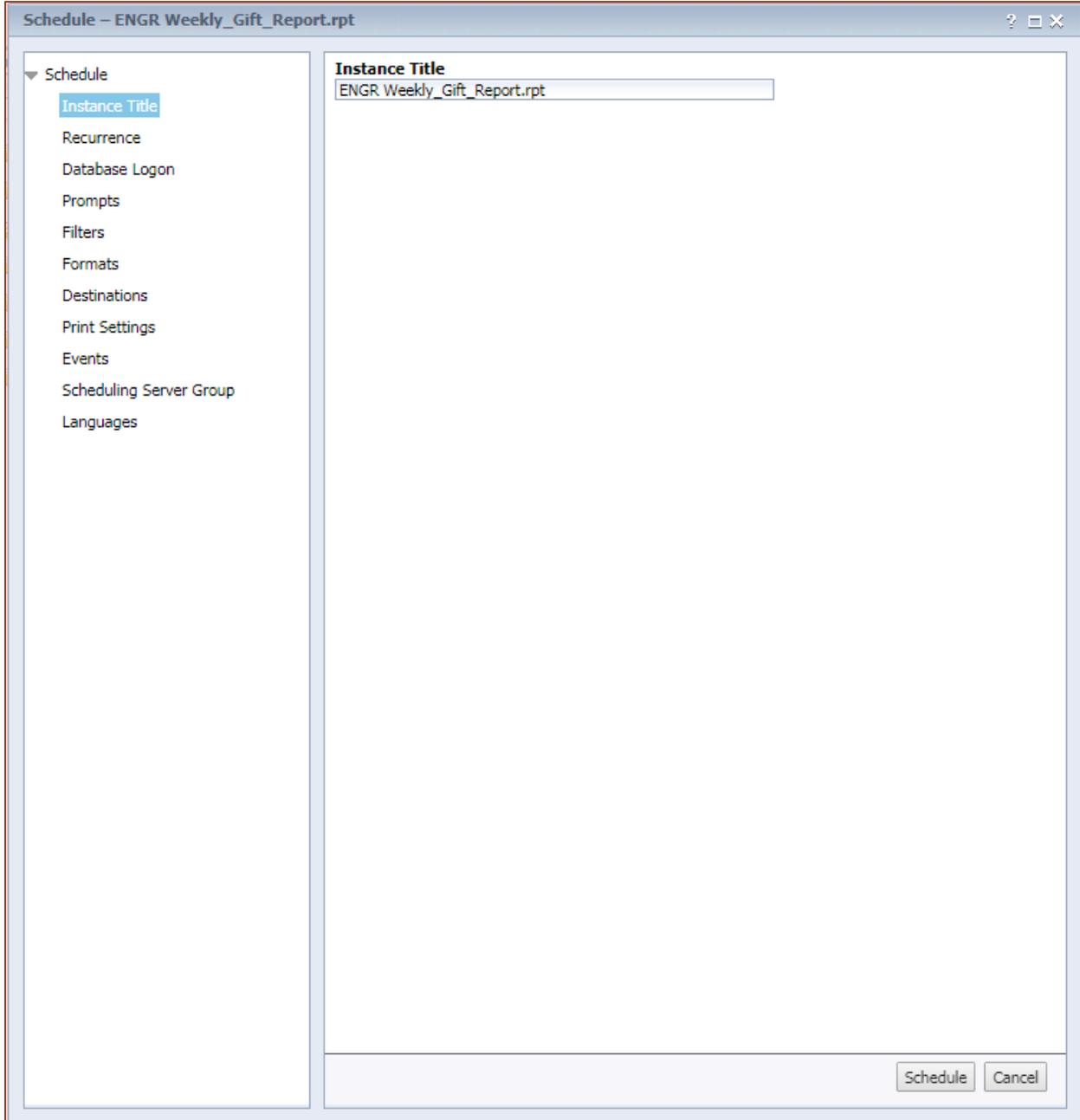
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



---

# Development Officer Handbook

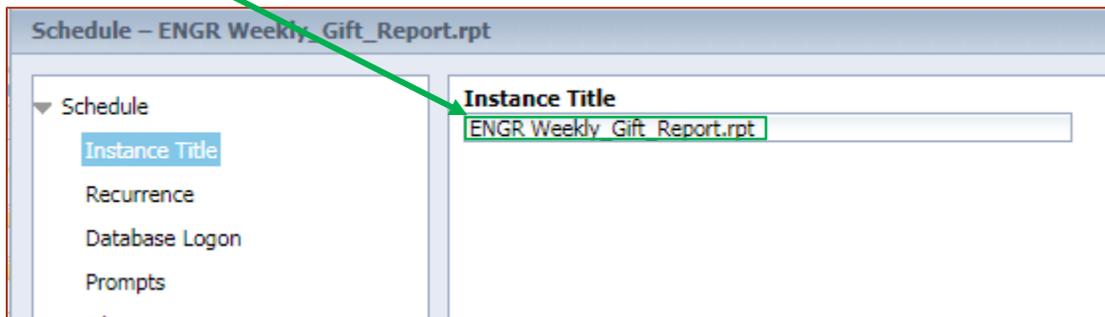
Ver. 1.3

12 December 2018

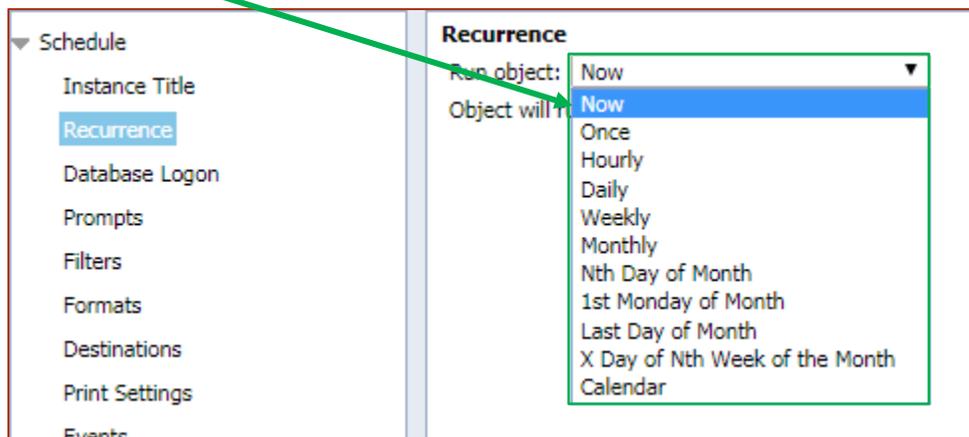
---

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!**

---

---

# Development Officer Handbook

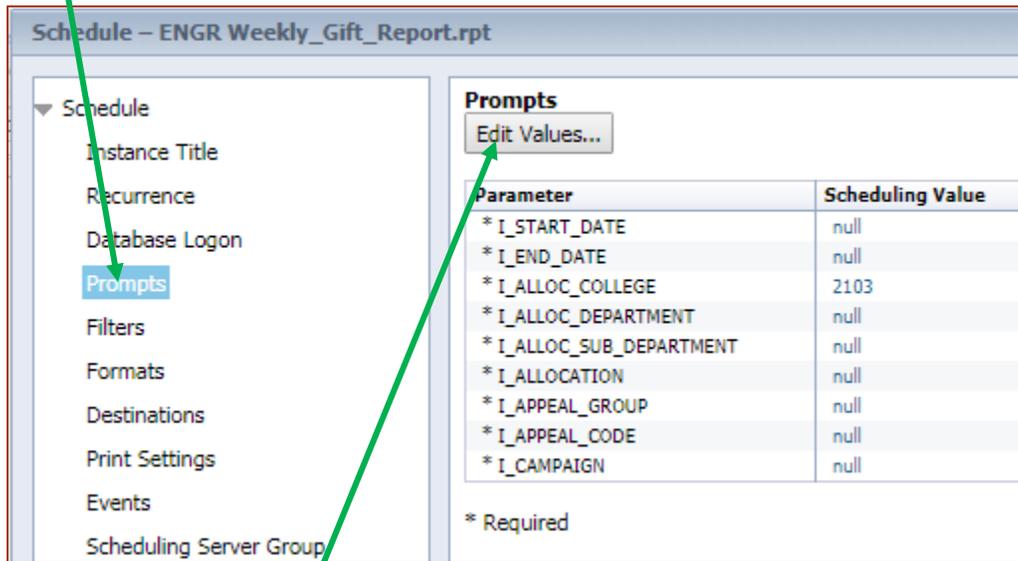
Ver. 1.3

12 December 2018

---

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.**

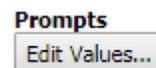


---

*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.



# Development Officer Handbook

Ver. 1.3

12 December 2018

8. If you want to change a parameter remove the check mark by [Set to Null](#)

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.)

The screenshot shows a 'Prompts' dialog box with the following fields:

- I\_START\_DATE**: Input field containing '2/5/2018 16:02:31'. The 'Set to Null' checkbox is unchecked. A green box highlights this field, and a green arrow points to the checkbox.
- I\_END\_DATE**: Input field is empty. The 'Set to Null' checkbox is checked.
- I\_ALLOC\_COLLEGE**: Input field containing '2103'. The 'Set to Null' checkbox is unchecked.
- I\_ALLOC\_DEPARTMENT**: Input field is empty. The 'Set to Null' checkbox is checked.
- I\_ALLOC\_SUB\_DEPARTMENT**: Input field is empty. The 'Set to Null' checkbox is checked.
- I\_ALLOCATION**: Input field is empty. The 'Set to Null' checkbox is checked.

---

# Development Officer Handbook

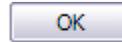
Ver. 1.3

12 December 2018

---

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.

A screenshot of a software dialog box titled "Prompts". The dialog box contains several input fields, each with a "Set to Null" checkbox. The fields are labeled: I\_ALLOC\_DEPARTMENT, I\_ALLOC\_SUB\_DEPARTMENT, I\_ALLOCATION, I\_APPEAL\_GROUP, I\_APPEAL\_CODE, and I\_CAMPAIN. Each field has a corresponding label on the right side. A green arrow points from the word "OK" in the text above to the "OK" button at the bottom right of the dialog box. The dialog box also has a "Cancel" button next to the "OK" button.

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

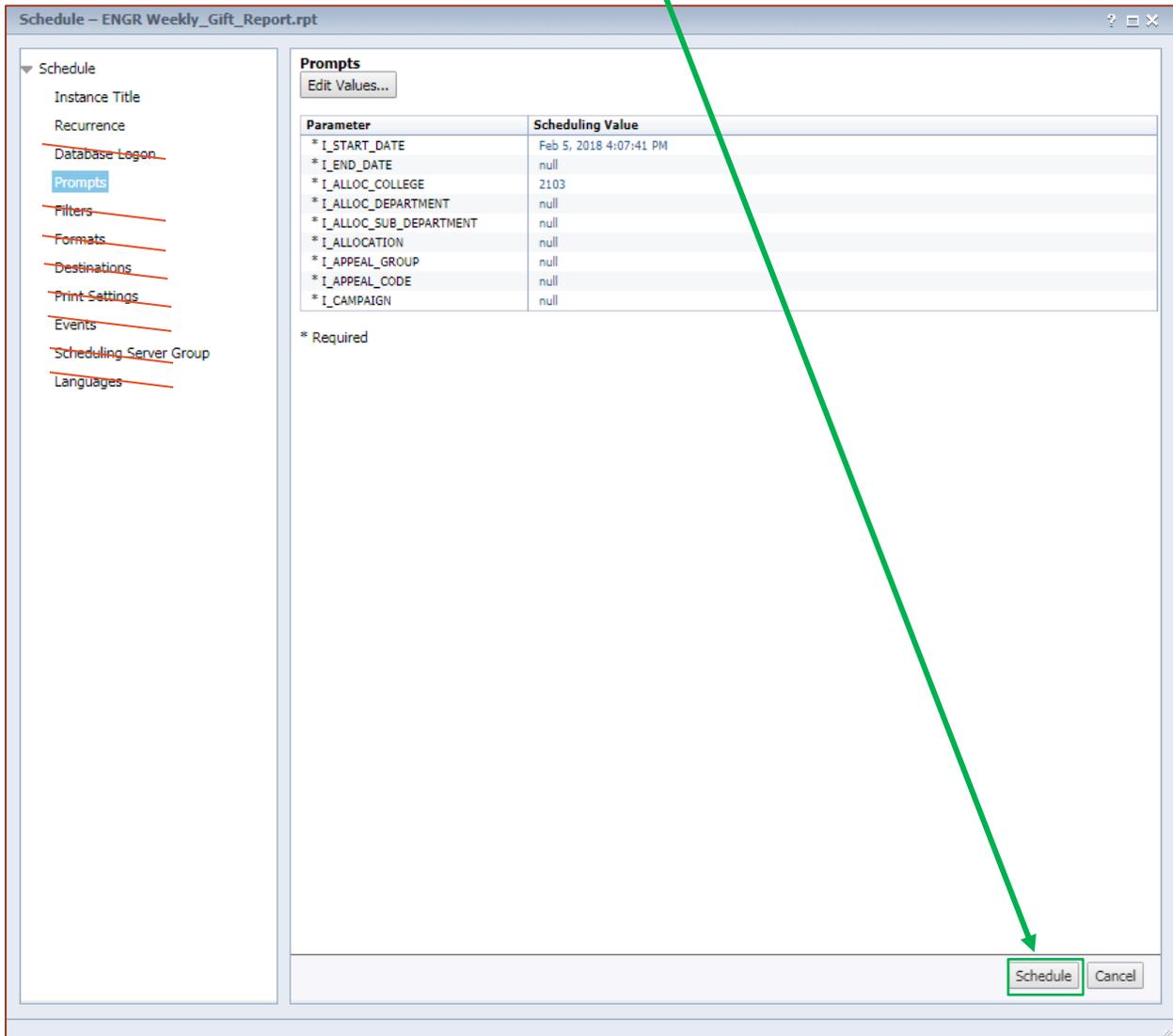
---

11. Start the report by left-clicking the [Schedule](#) button in the bottom right-hand corner of the screen.

---

**IGNORE ALL OTHER OPTIONS!**

---

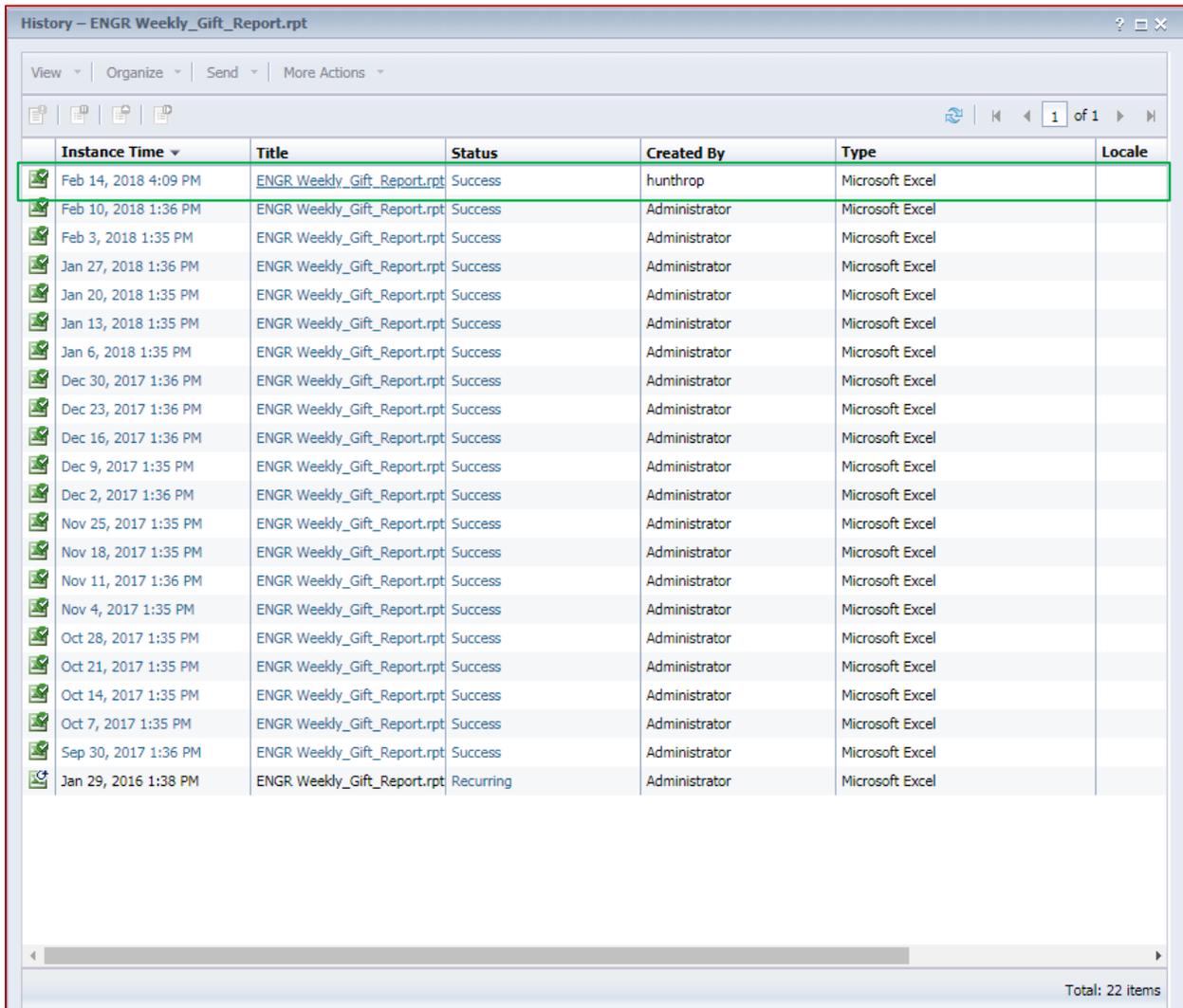


# Development Officer Handbook

Ver. 1.3

12 December 2018

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:



The screenshot shows a window titled "History - ENGR Weekly\_Gift\_Report.rpt". The window contains a table with the following columns: Instance Time, Title, Status, Created By, Type, and Locale. The table lists 22 instances of the report, with the first instance highlighted in green. The status of all instances is "Success" except for the first one, which is "Recurring".

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	

---

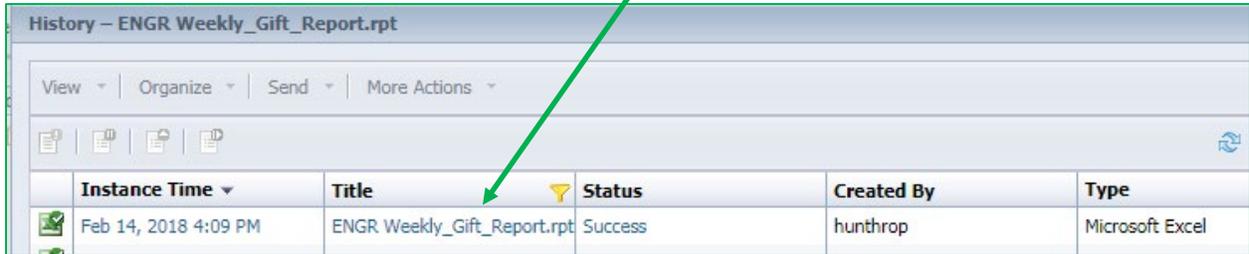
# Development Officer Handbook

Ver. 1.3

12 December 2018

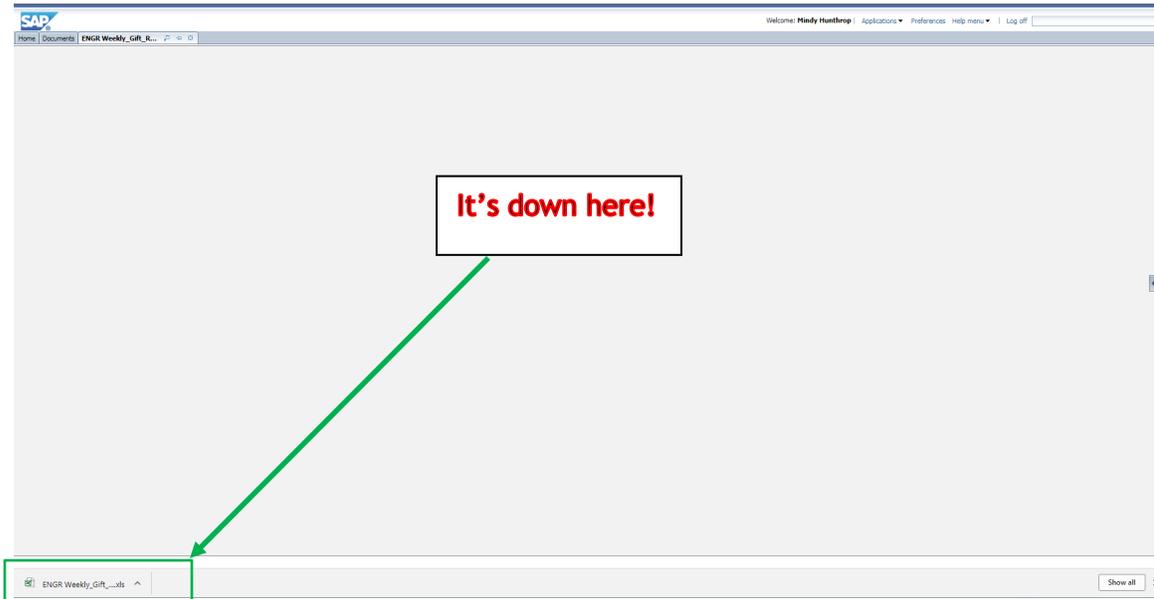
---

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



Instance Time	Title	Status	Created By	Type
Feb 14, 2018 4:09 PM	ENGR Weekly_Gift_Report.rpt	Success	hunthrop	Microsoft Excel

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>

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

1. Choose **App Store**.



---

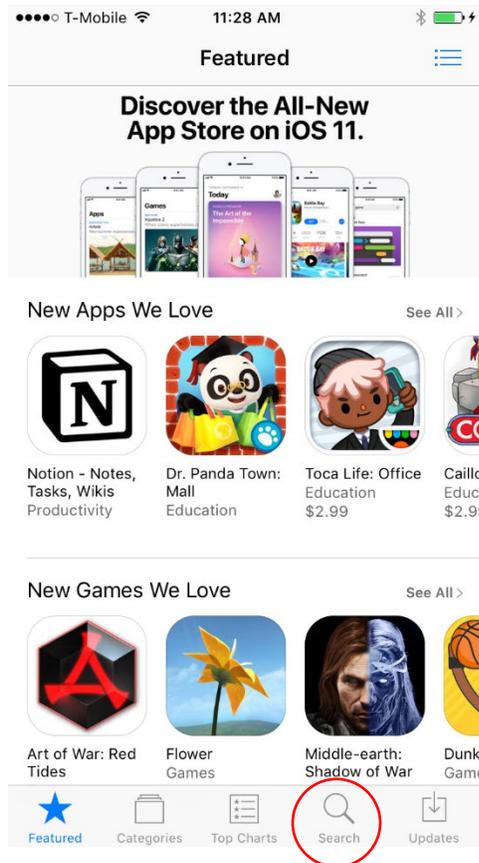
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



---

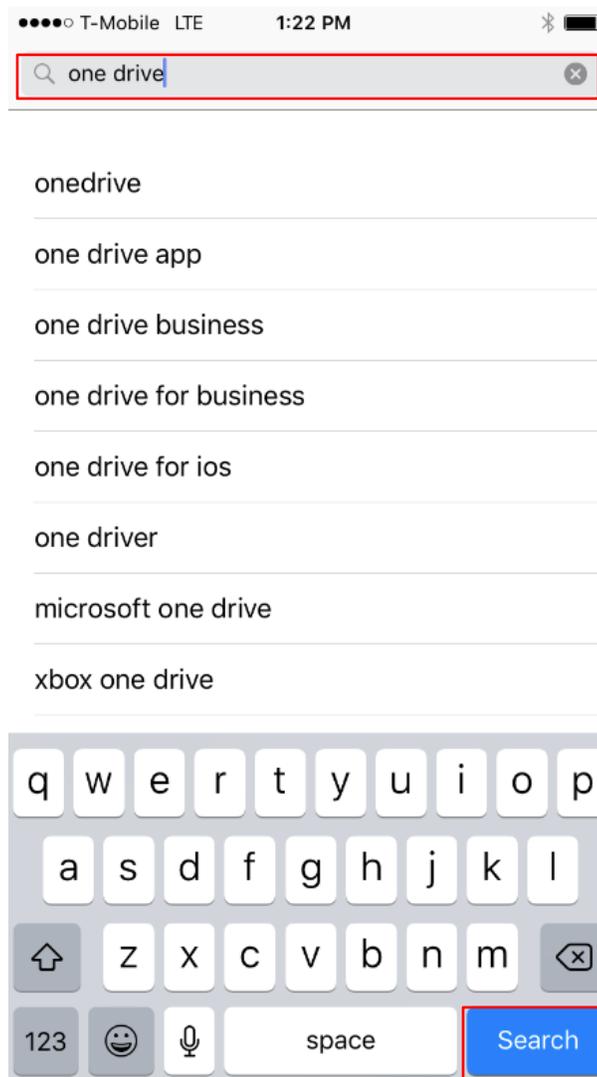
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

3. Type one drive in the Search bar and press .



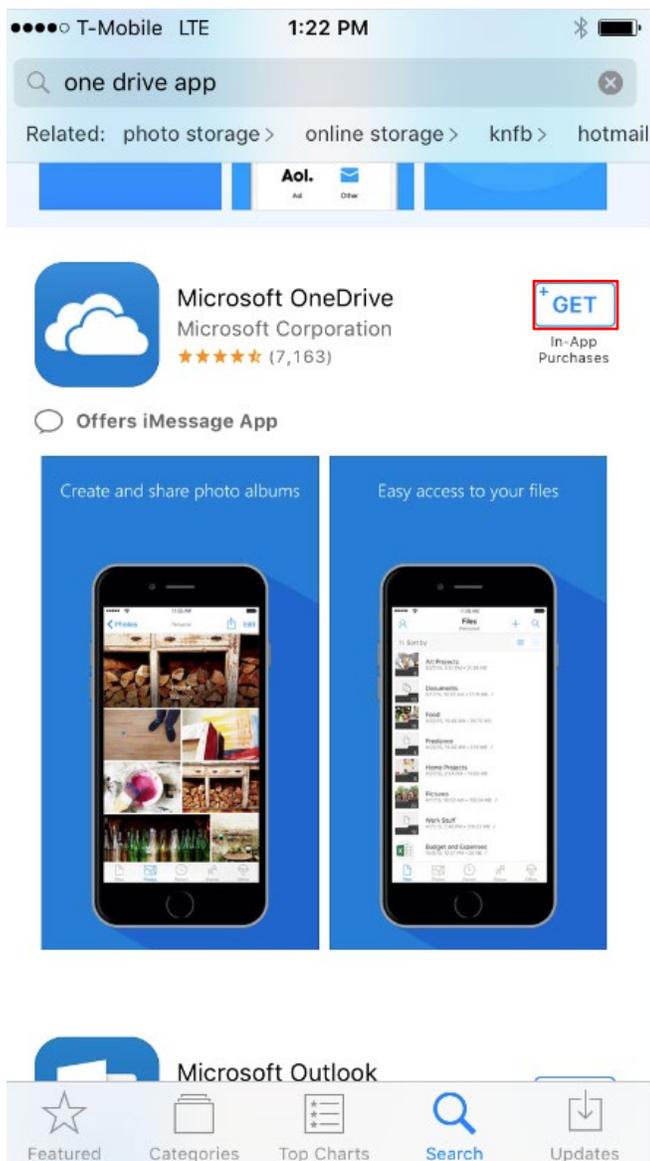
# Development Officer Handbook

Ver. 1.3

12 December 2018

4. Find the Microsoft OneDrive app.

5. Press  .



---

# Development Officer Handbook

Ver. 1.3

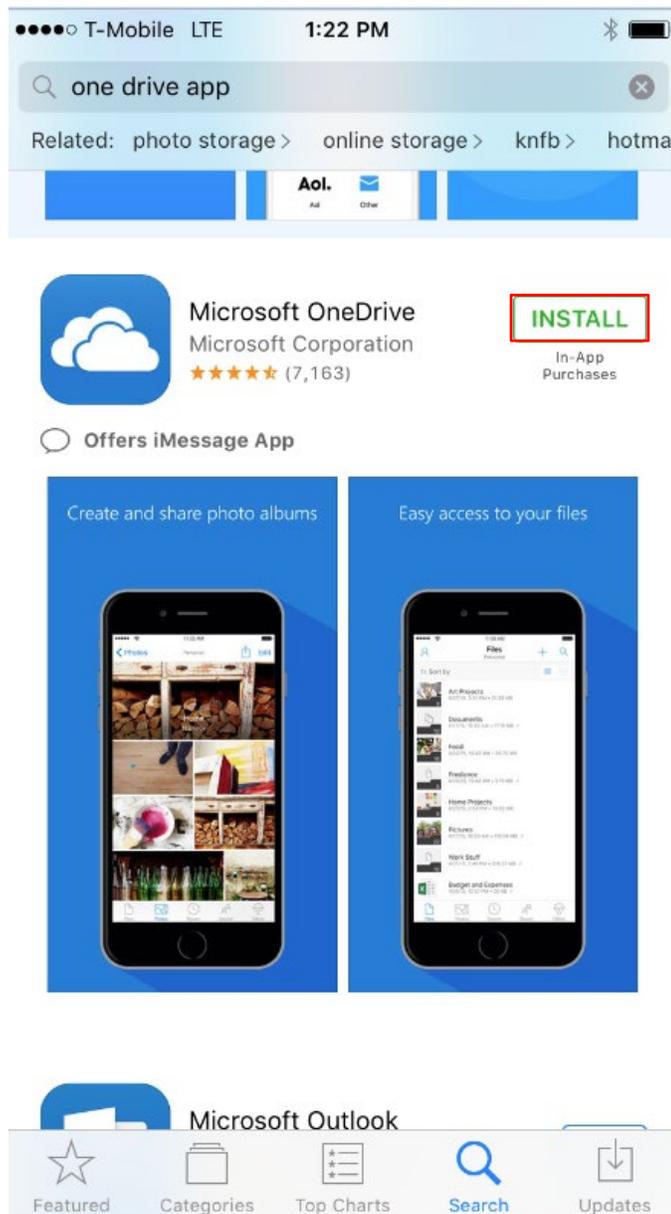
12 December 2018

---

6. Wait for download.

7. Press

**INSTALL**



---

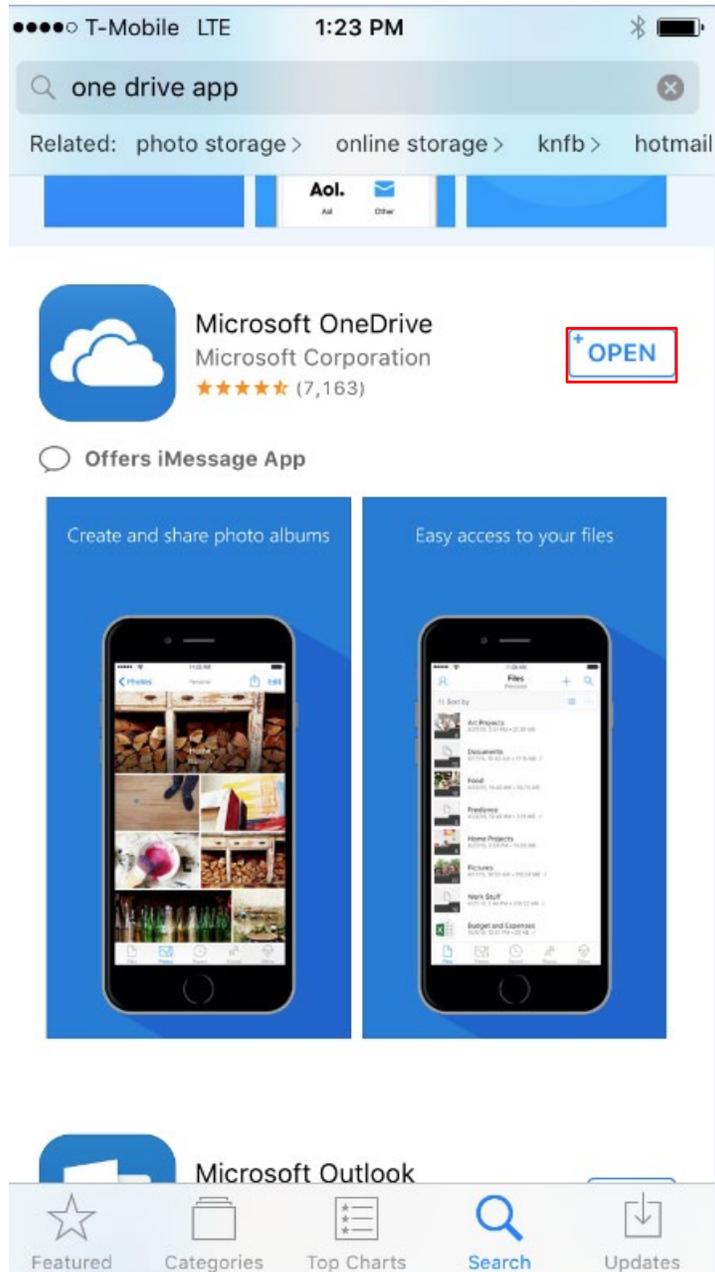
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

8. Press .



9. OneDrive will begin to load.

---

## *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---



10. Enter your UARK email address.

---

# Development Officer Handbook

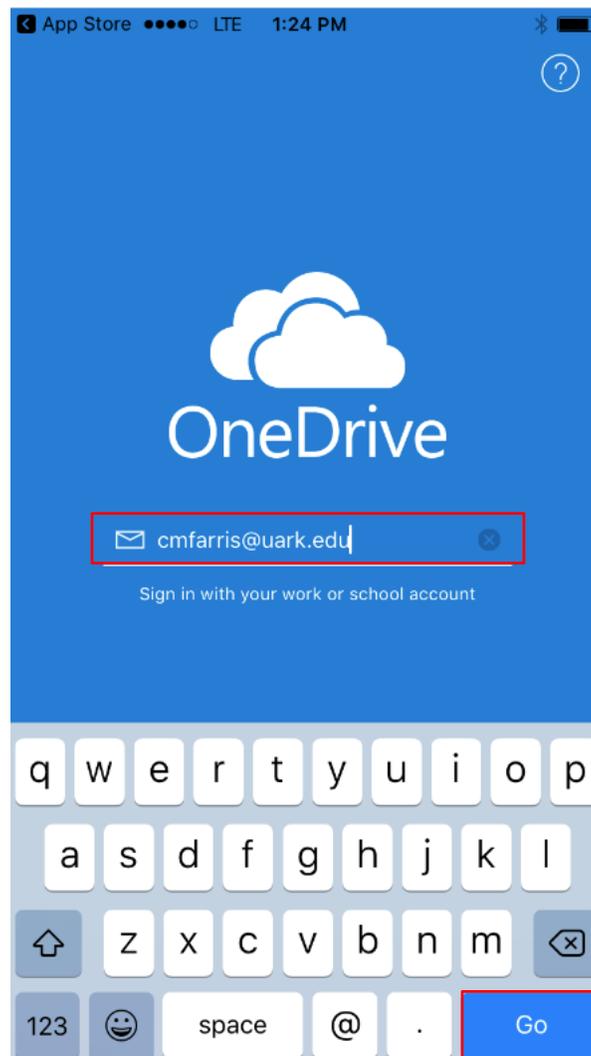
Ver. 1.3

12 December 2018

---

11. Press

Go



---

## Development Officer Handbook

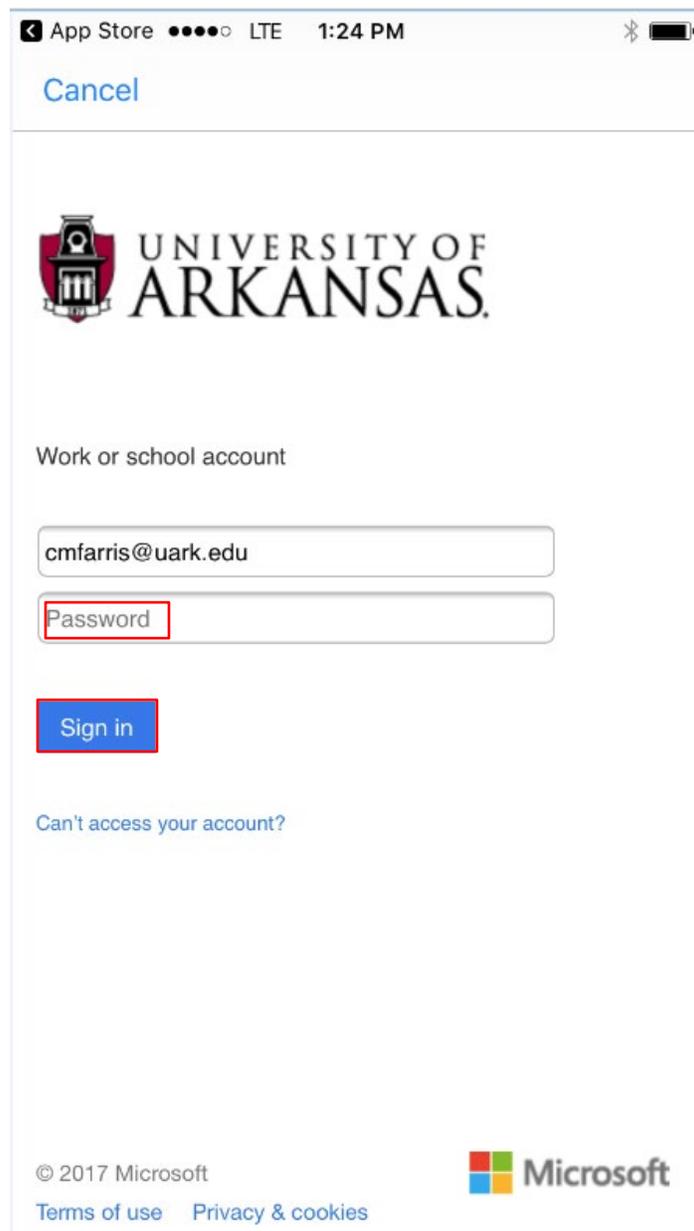
Ver. 1.3

12 December 2018

---

12. Enter your UARK password.

13. Press .



App Store ●●●●○ LTE 1:24 PM

Cancel

 UNIVERSITY OF  
ARKANSAS.

Work or school account

[Can't access your account?](#)

© 2017 Microsoft

[Terms of use](#) [Privacy & cookies](#)



14. OneDrive will contact the University's Server.

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---



---

# Development Officer Handbook

Ver. 1.3

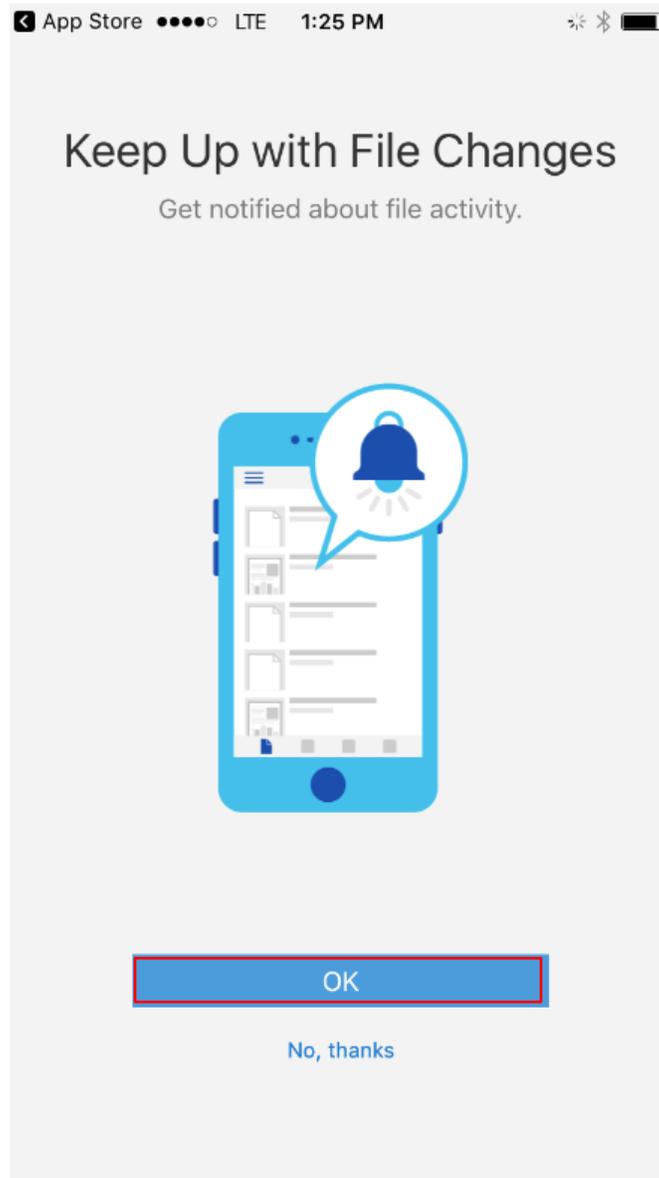
12 December 2018

---

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

16. Select

OK



---

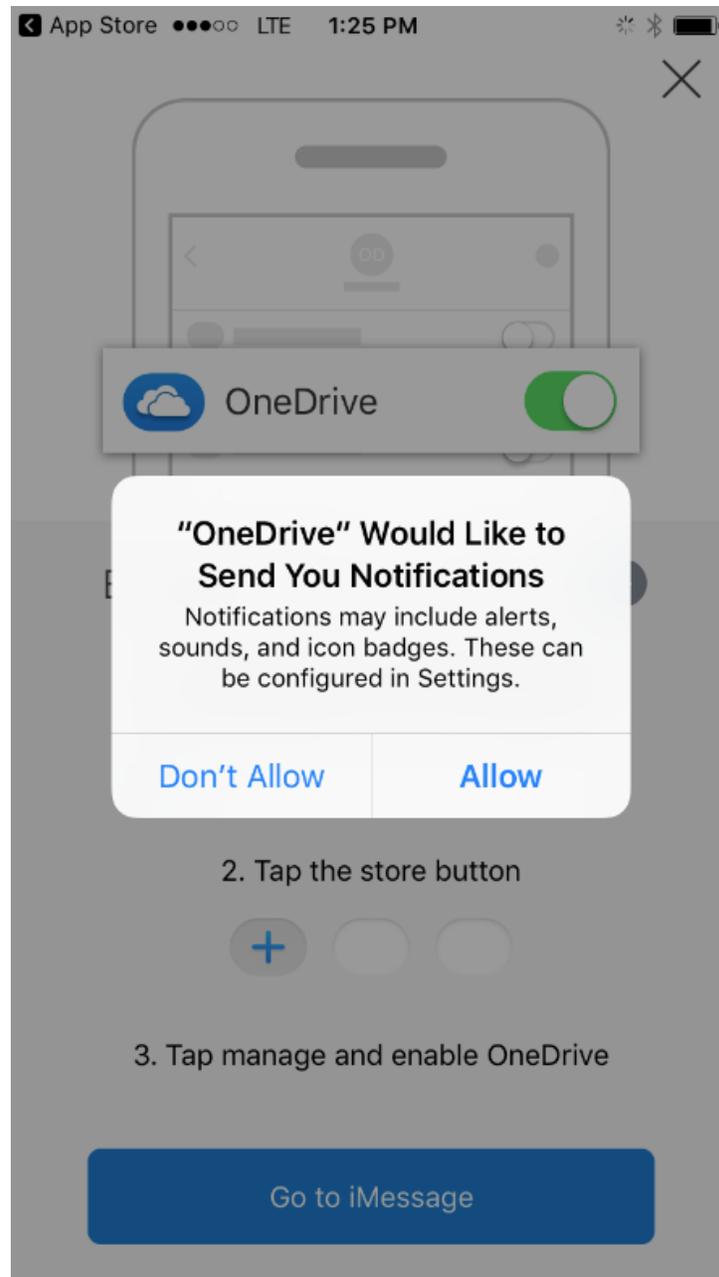
## Development Officer Handbook

Ver. 1.3

12 December 2018

---

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.

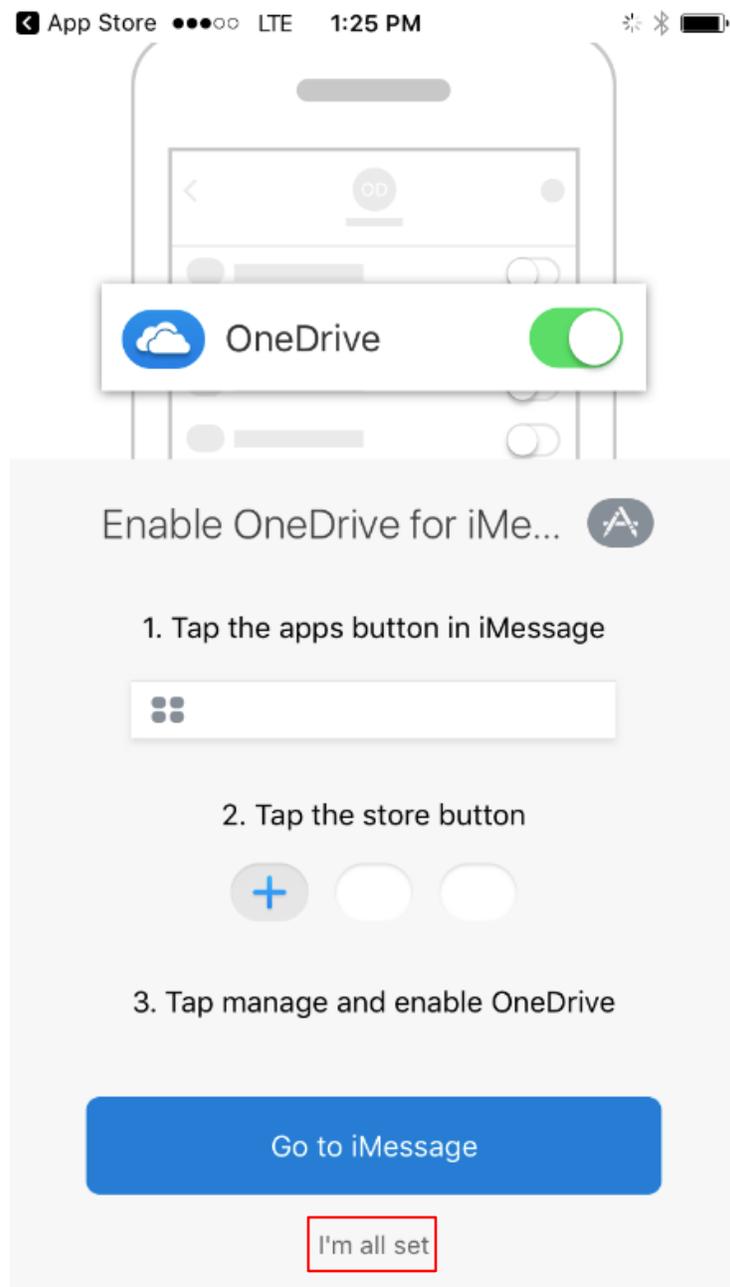
---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---



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

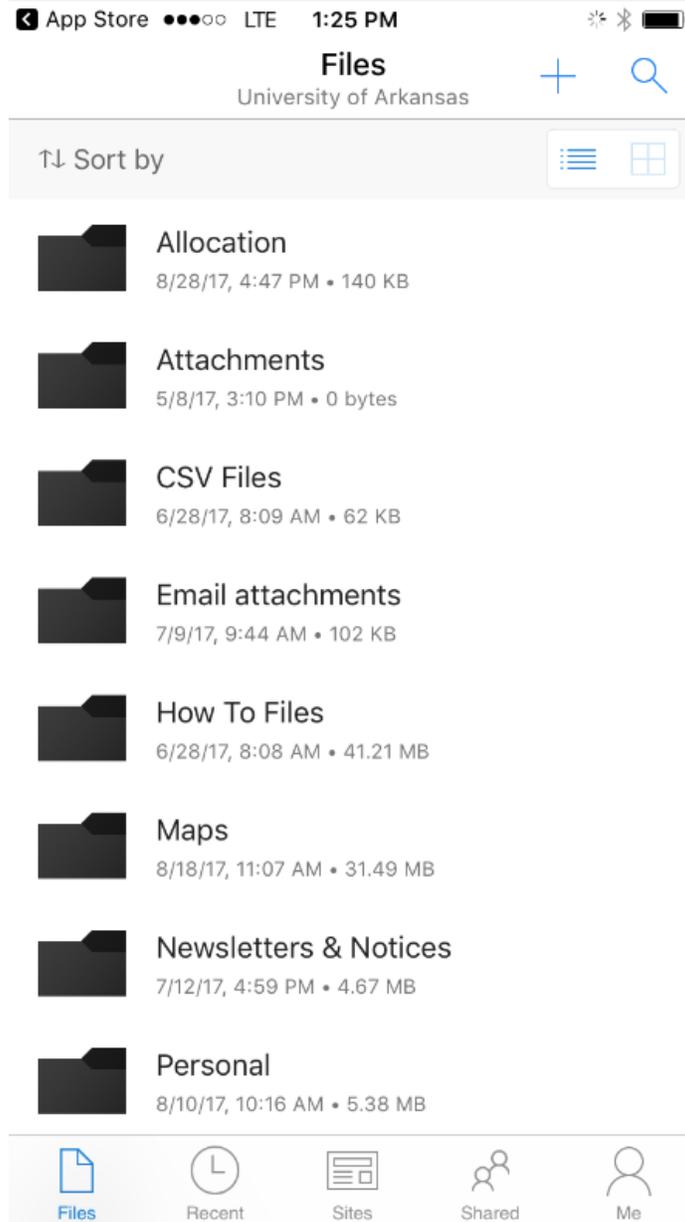
---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---



# 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>

---

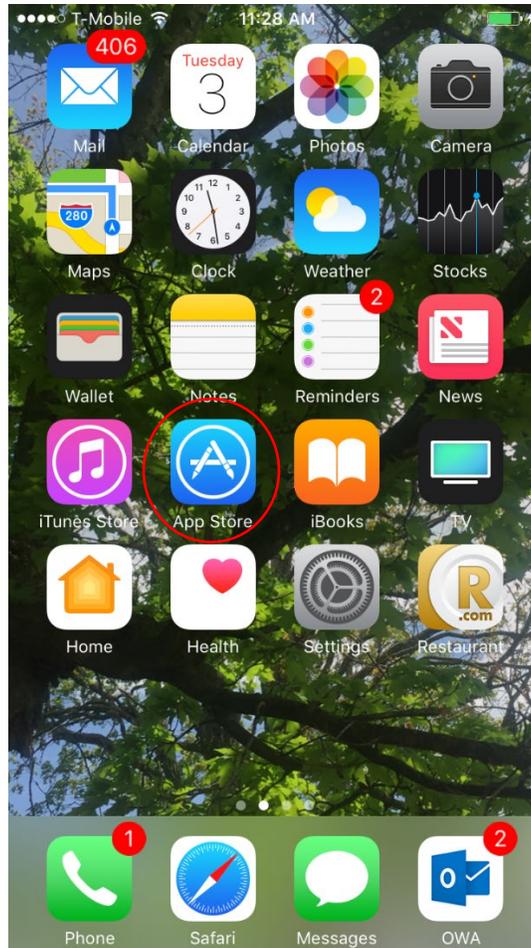
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

1. Choose **App Store**.



---

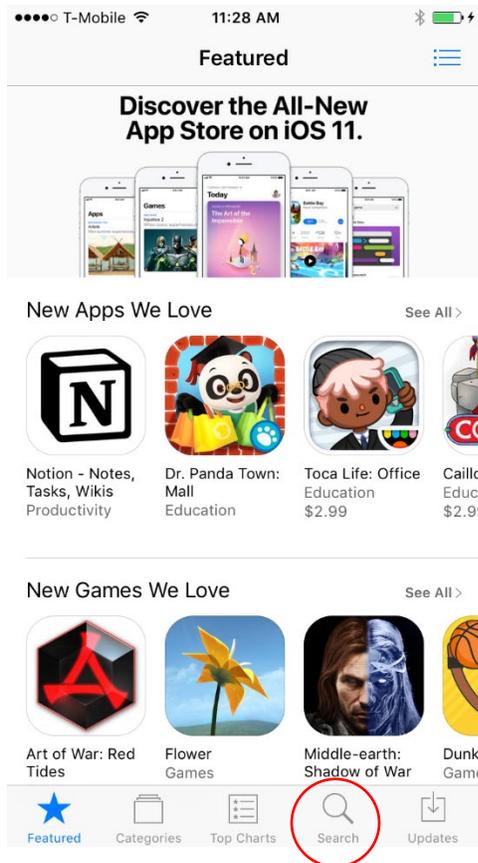
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



---

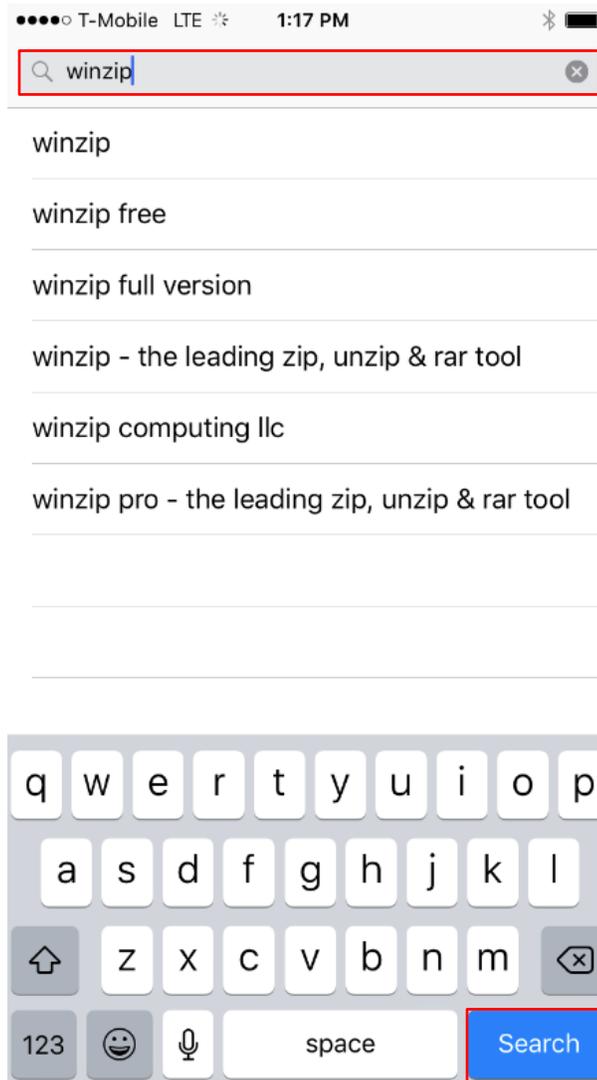
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



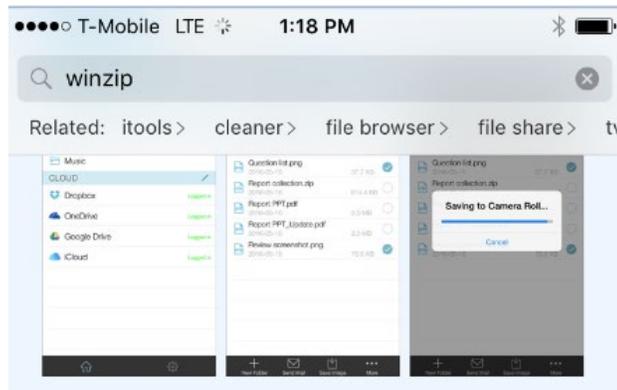
# Development Officer Handbook

Ver. 1.3

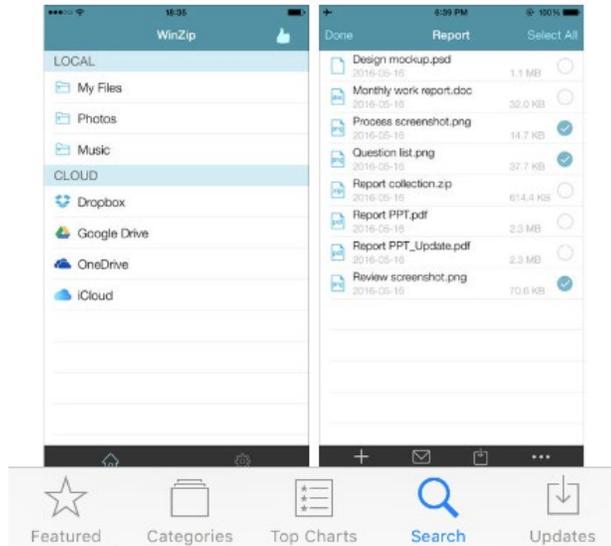
12 December 2018

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  .



WinZip - The Leading Zip, Unzip & RAR Tool  
WinZip Computing LLC  
★★★★☆ (9)



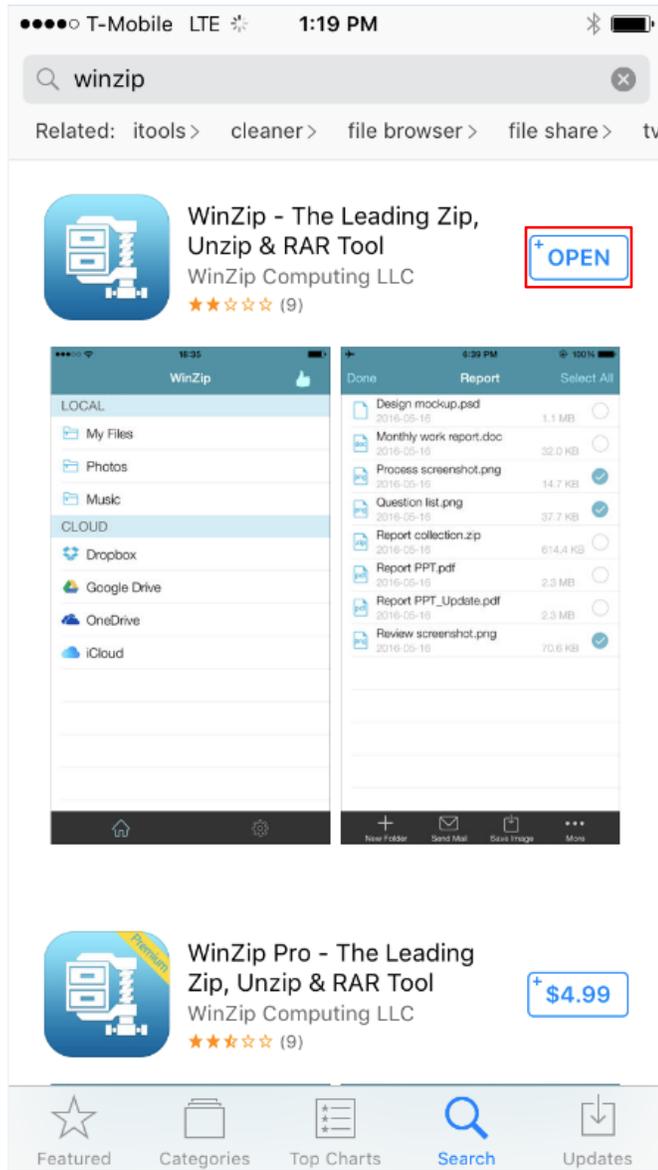
# Development Officer Handbook

Ver. 1.3

12 December 2018

6. Wait for download.

7. Press  .



---

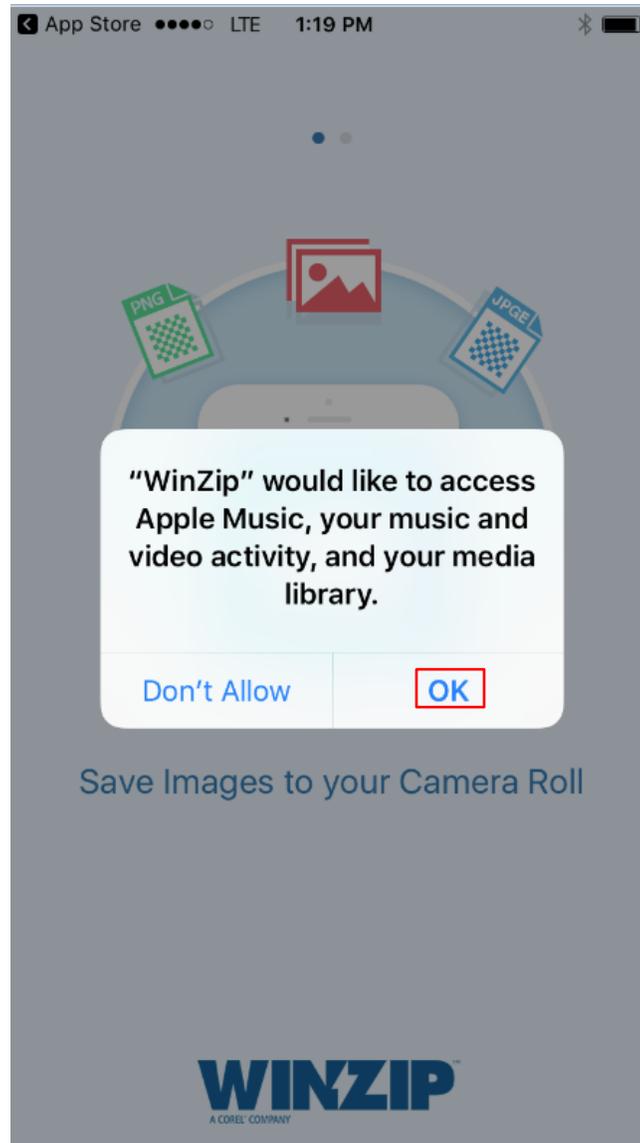
## Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



---

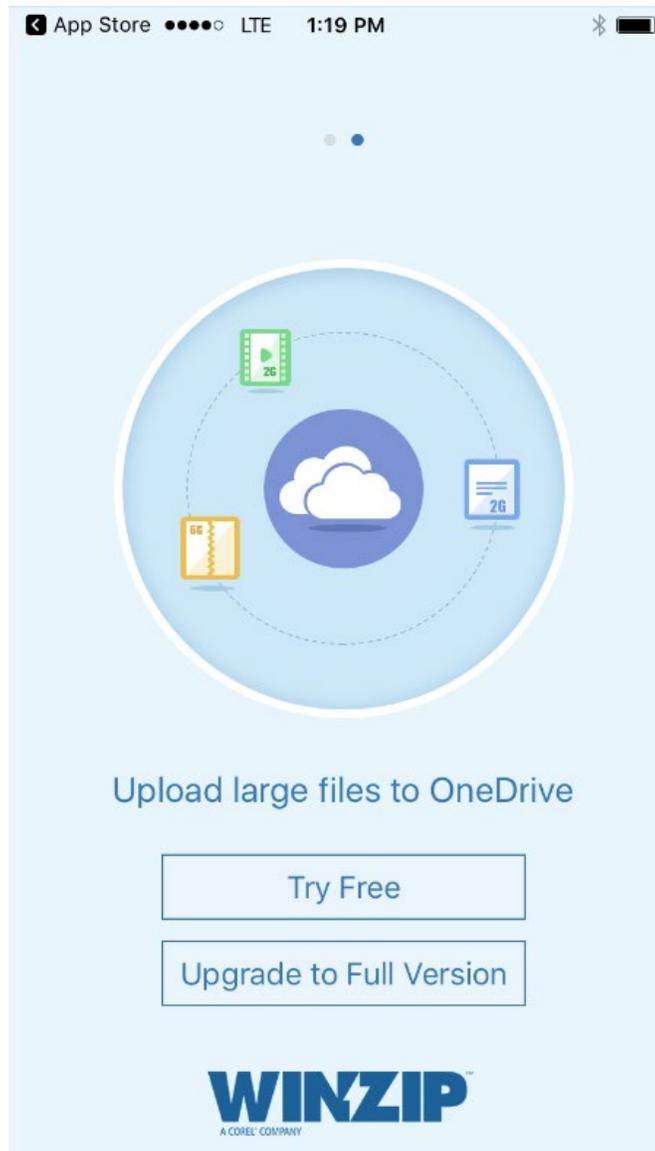
## Development Officer Handbook

Ver. 1.3

12 December 2018

---

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>

---

# Development Officer Handbook

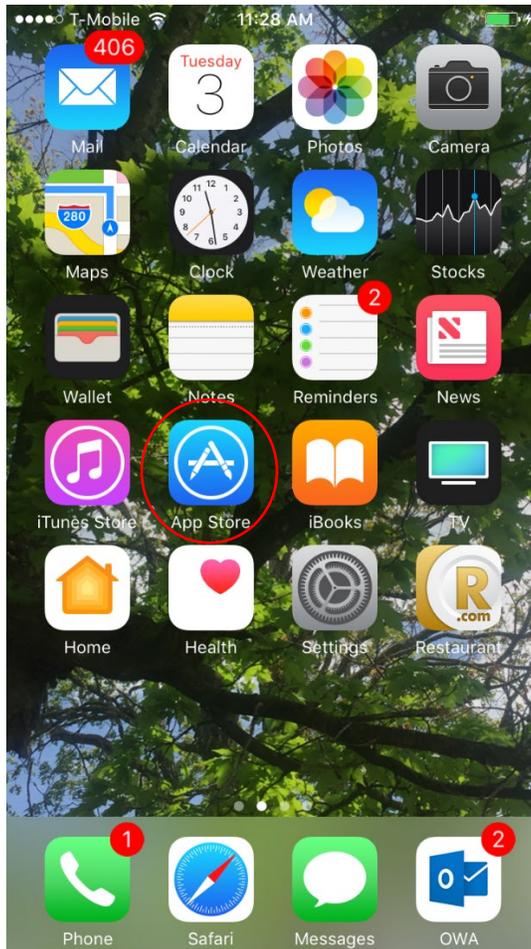
Ver. 1.3

12 December 2018

---

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

1. Choose **App Store**.



---

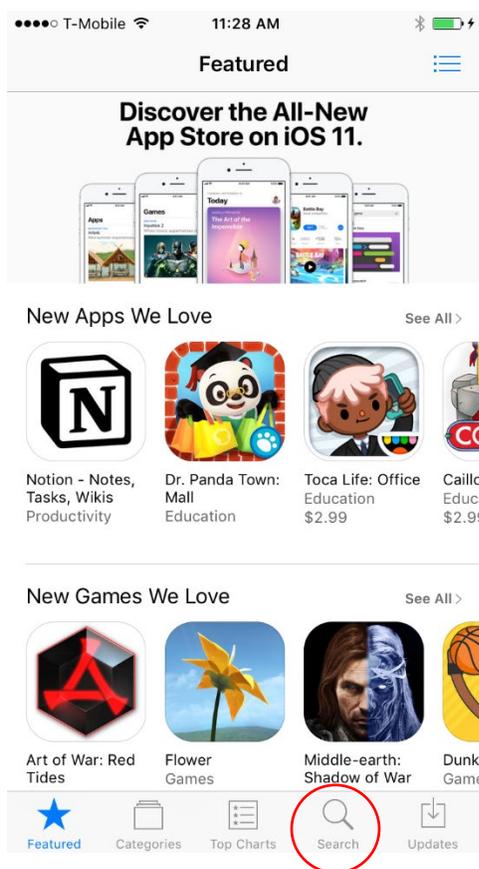
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



---

# Development Officer Handbook

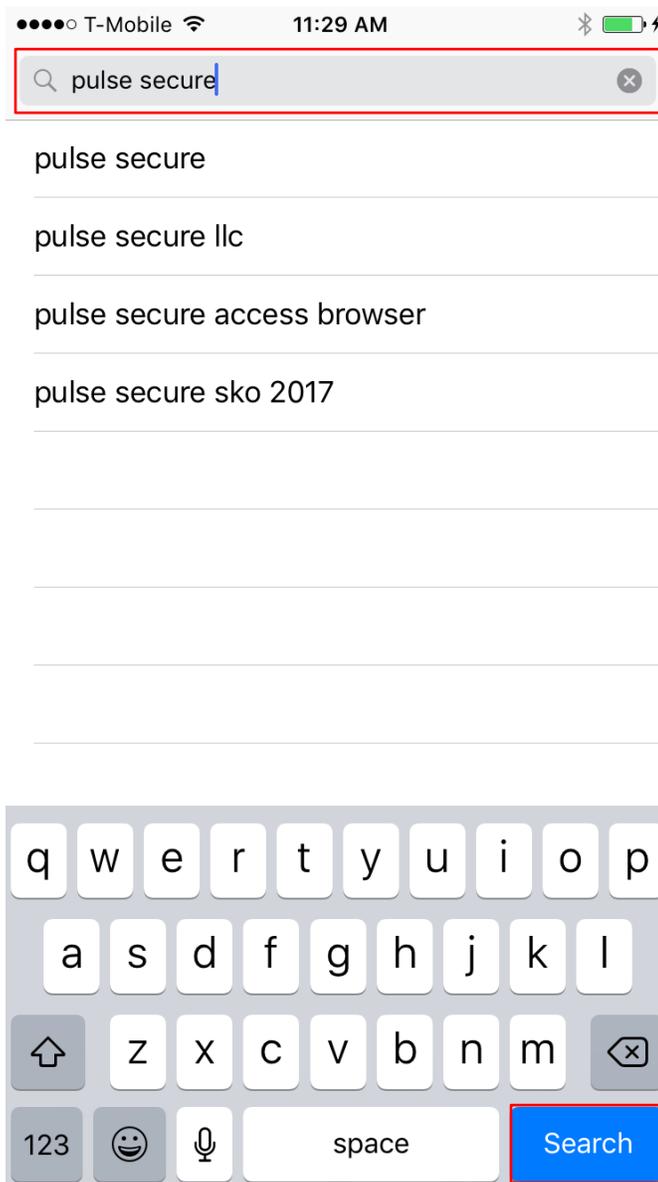
Ver. 1.3

12 December 2018

---



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

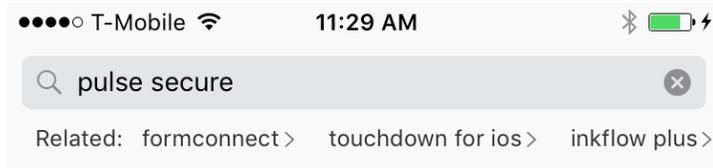


# Development Officer Handbook

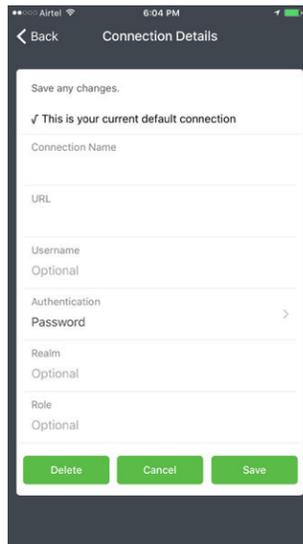
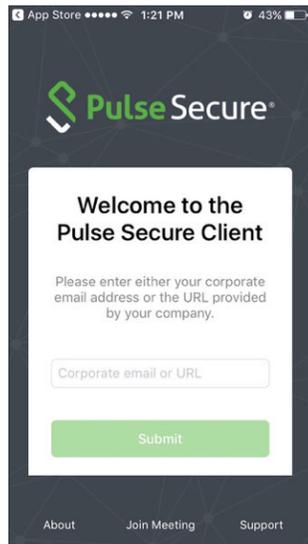
Ver. 1.3

12 December 2018

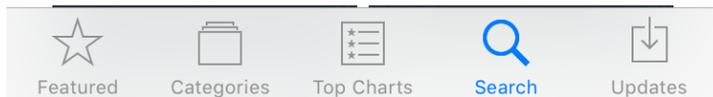
4. Find Pulse Secure in your Search results (mine came up first) and press the



Pulse Secure  
Pulse Secure LLC



Pulse Secure Access  
Browser  
Pulse Secure LLC



---

# Development Officer Handbook

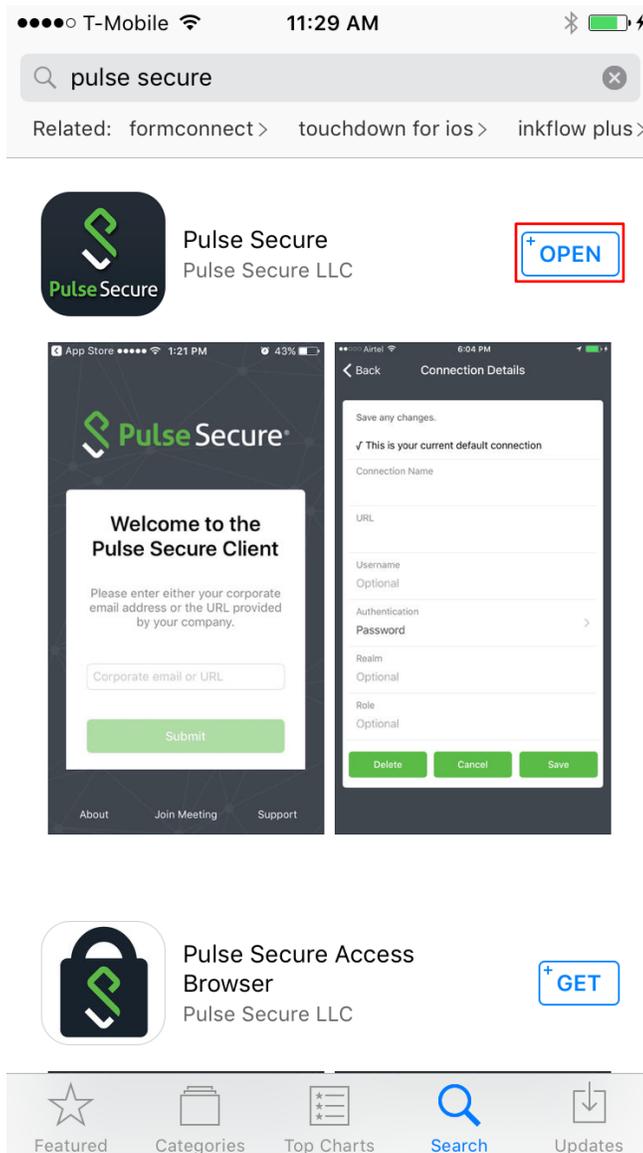
Ver. 1.3

12 December 2018

---

5. Wait for download.

6. Press .



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

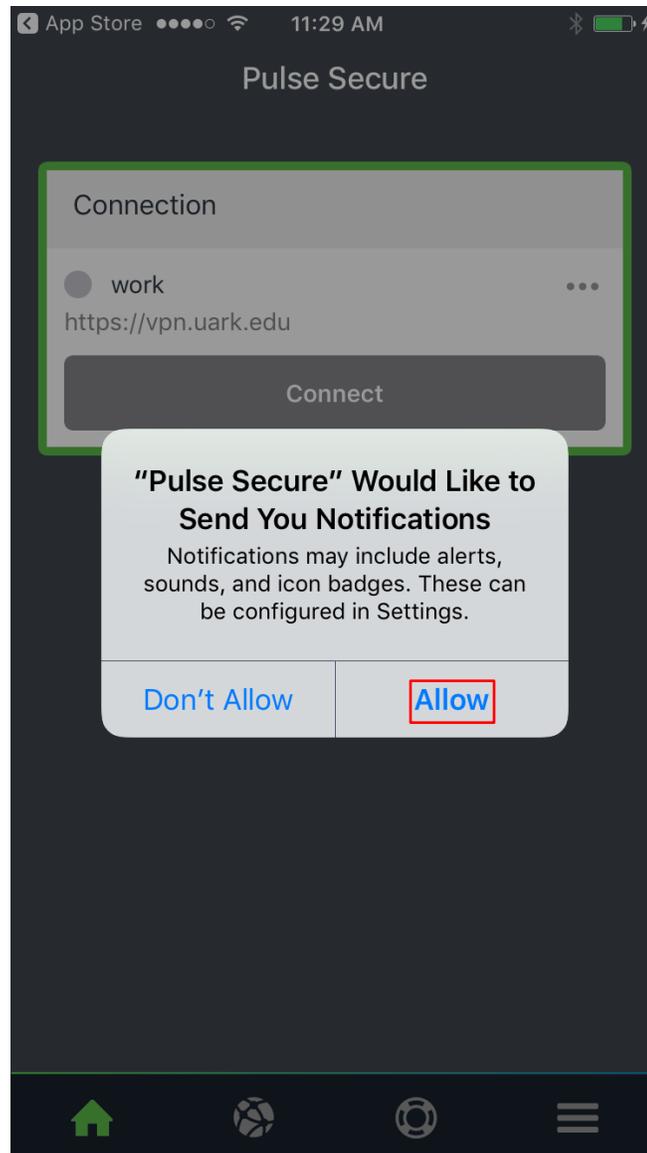
---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---



8. Click **Allow**.

---

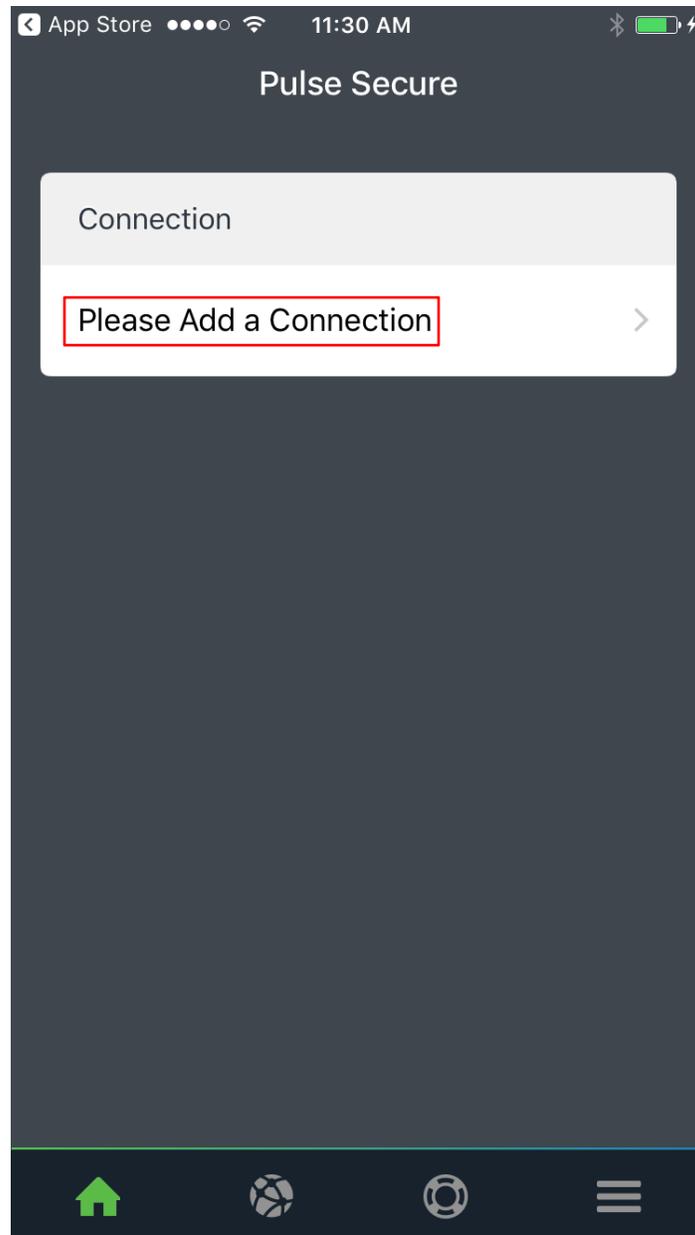
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



---

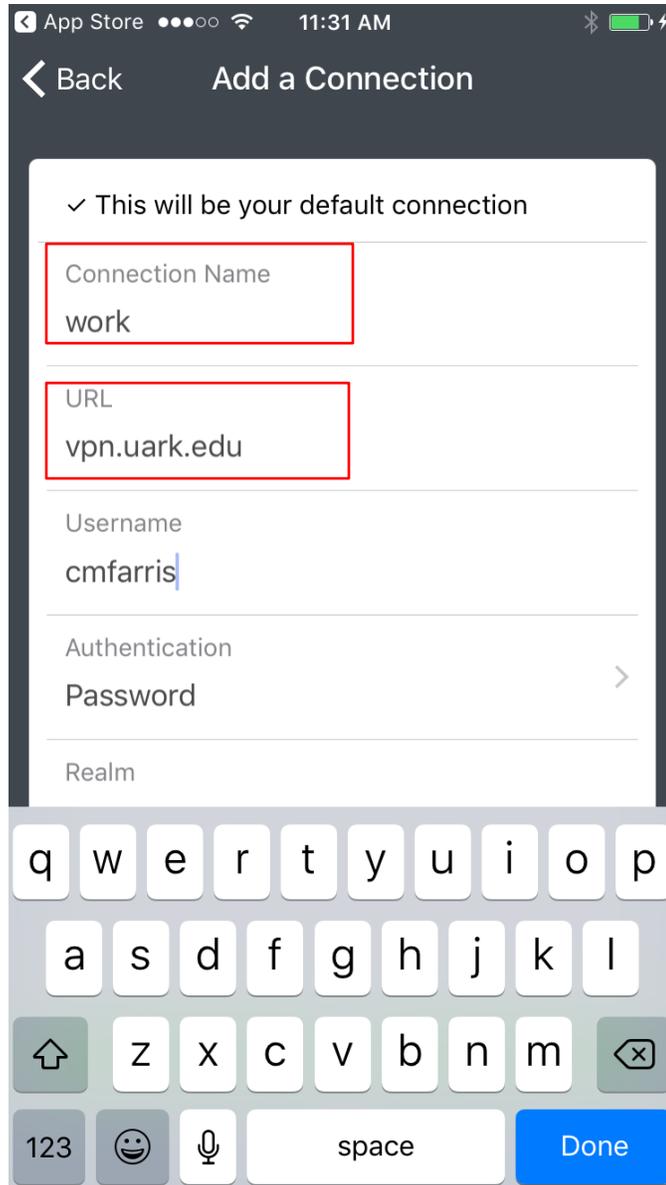
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



---

# Development Officer Handbook

Ver. 1.3

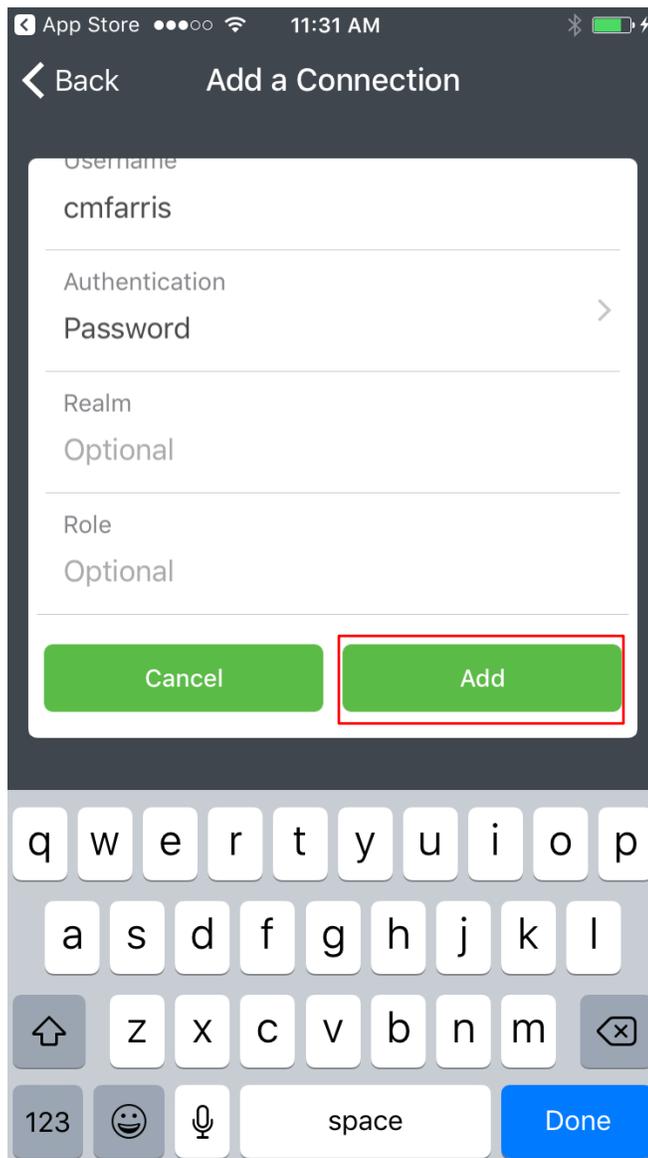
12 December 2018

---

11. Scroll down.



12. Click



---

# Development Officer Handbook

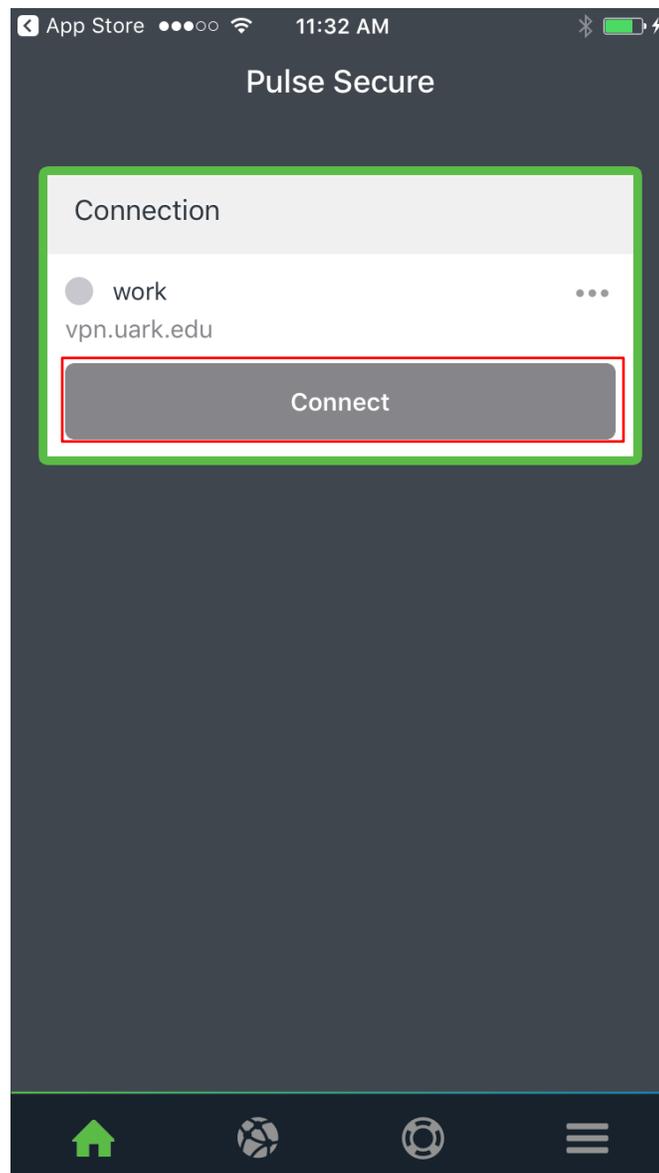
Ver. 1.3

12 December 2018

---

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

14. Click



---

# Development Officer Handbook

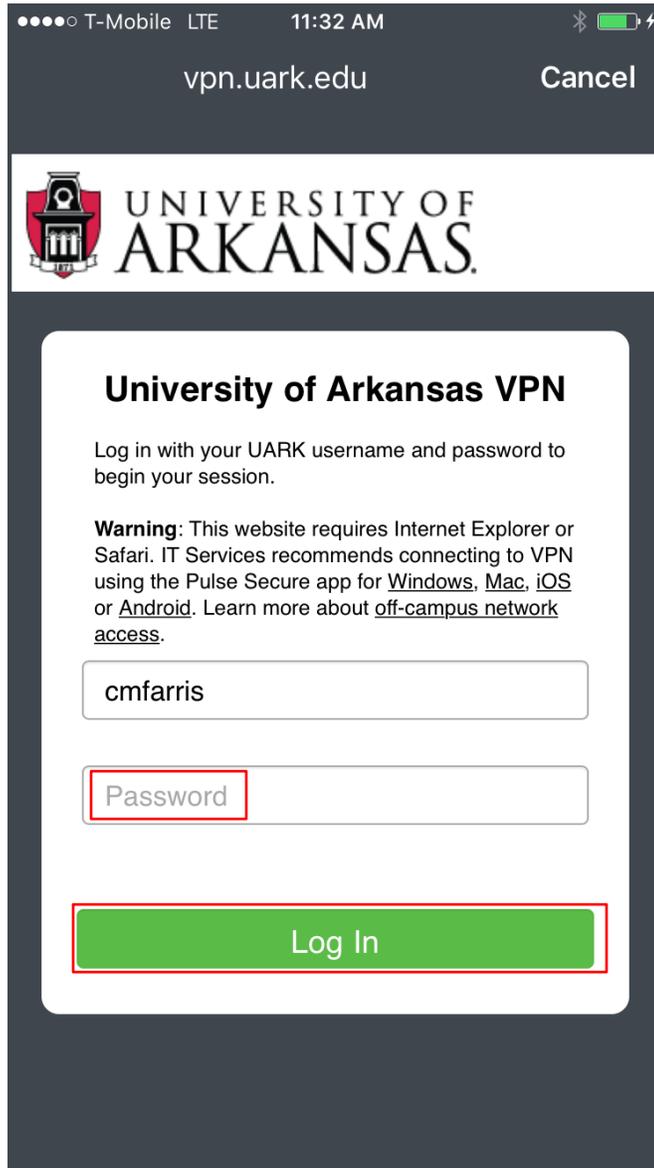
Ver. 1.3

12 December 2018

---

15. Enter your password.

16. Press



---

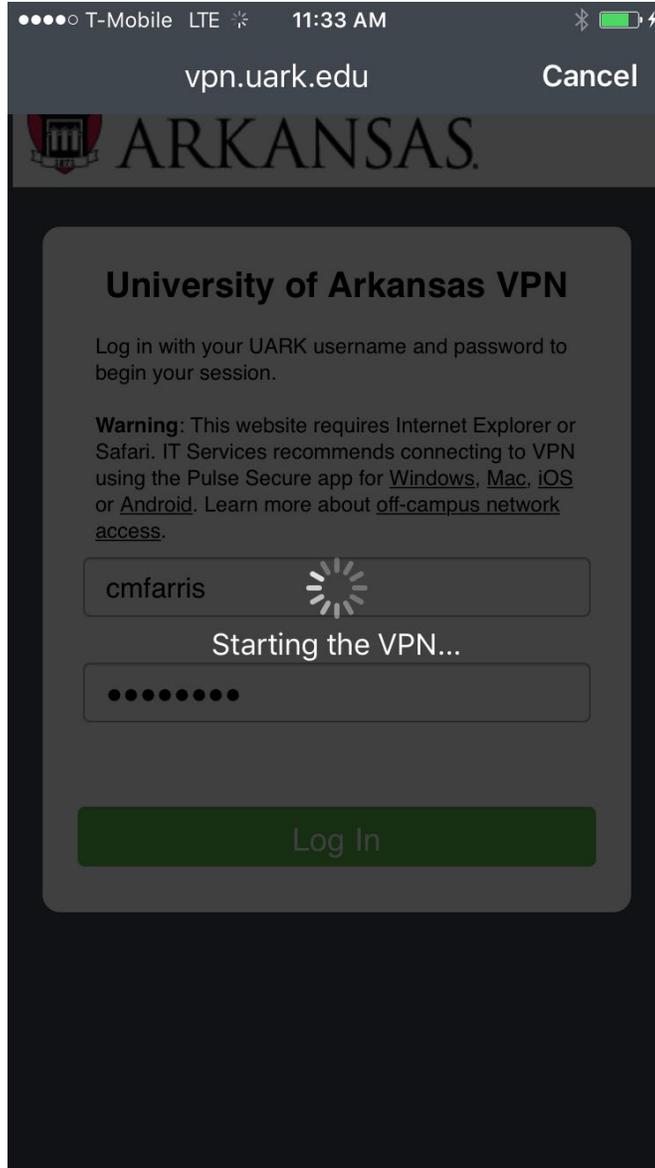
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



---

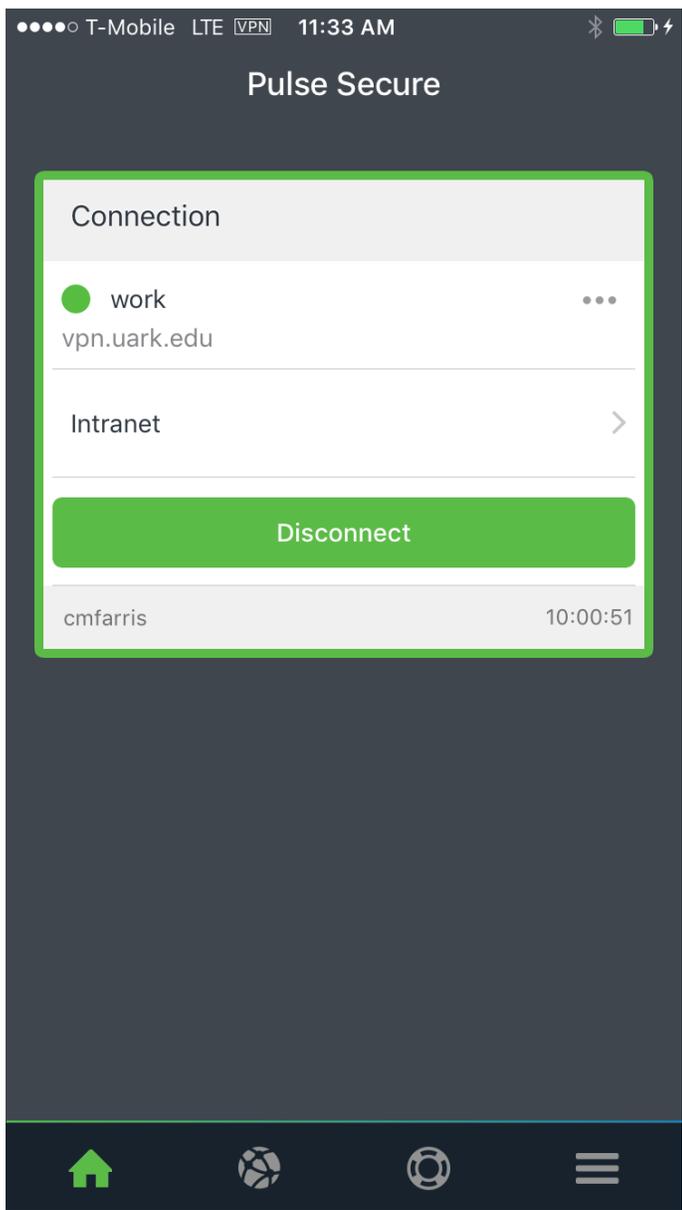
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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



# How to Find Differences in Excel Files

---

# Development Officer Handbook

Ver. 1.3

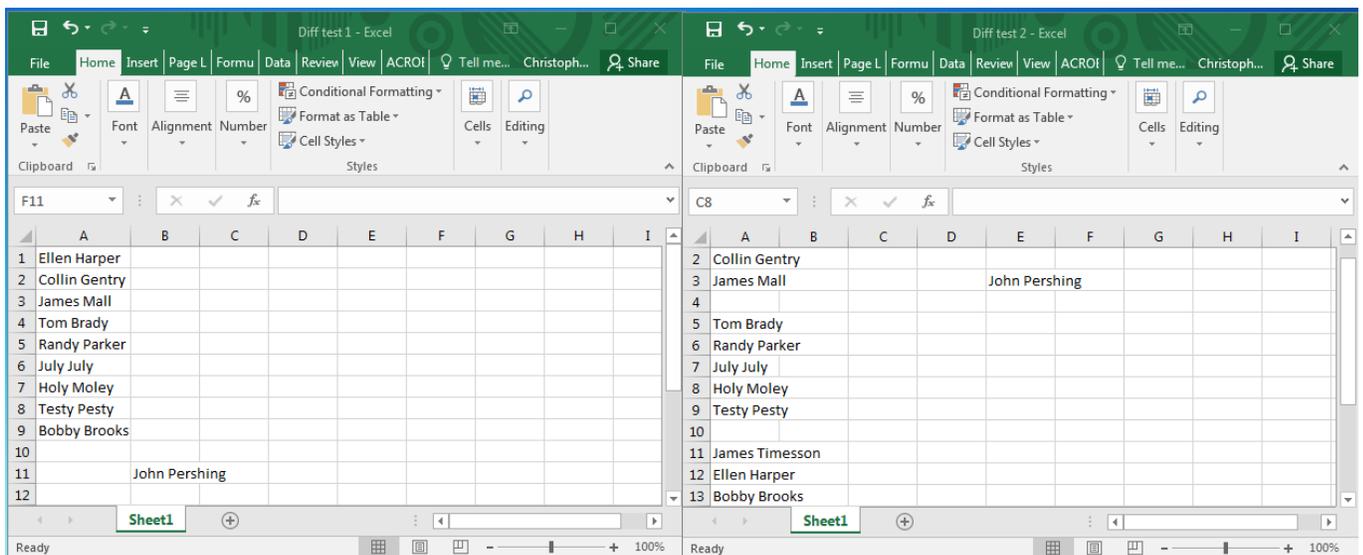
12 December 2018

---

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.

---

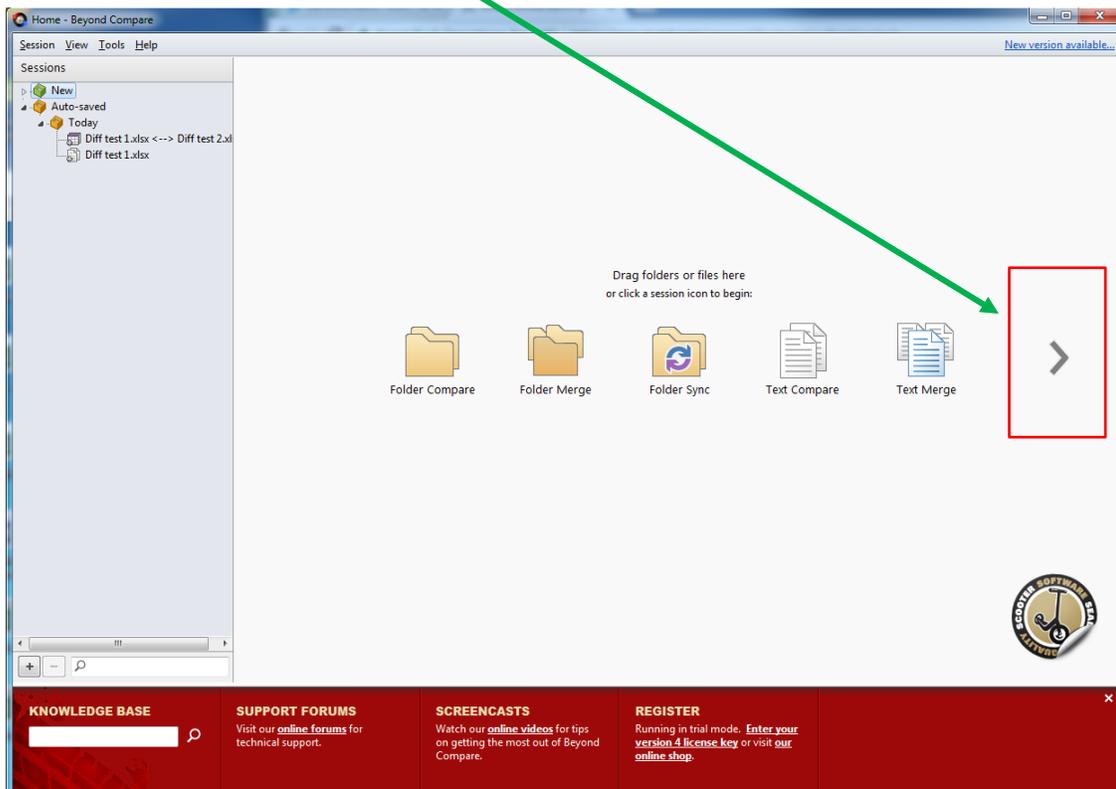
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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

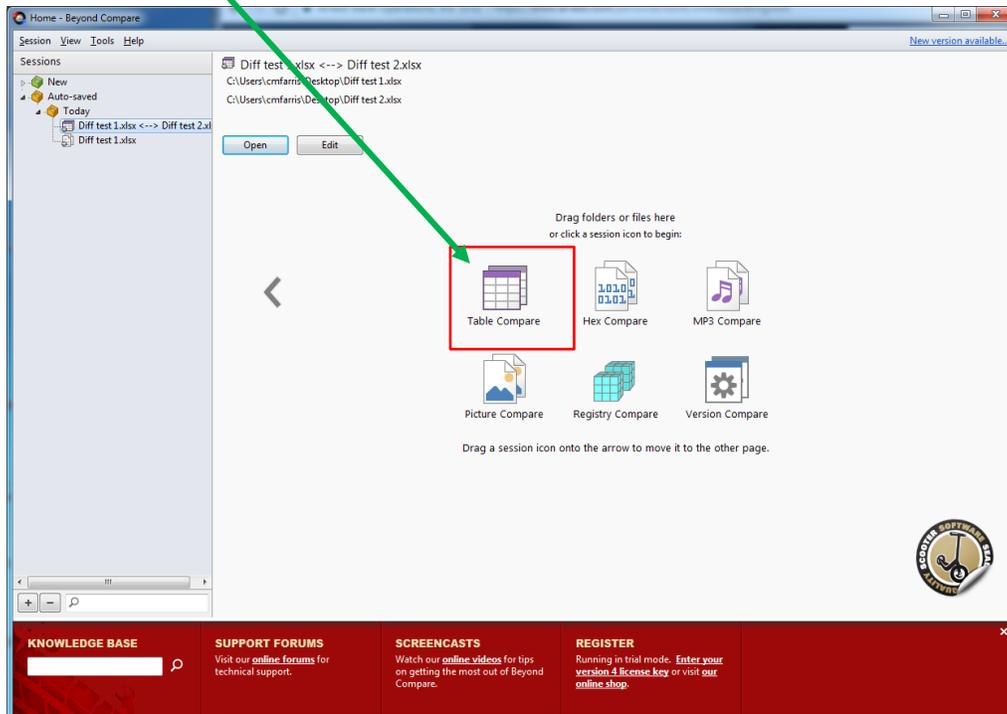


# Development Officer Handbook

Ver. 1.3

12 December 2018

5. Choose the “**Table Compare**” icon.



---

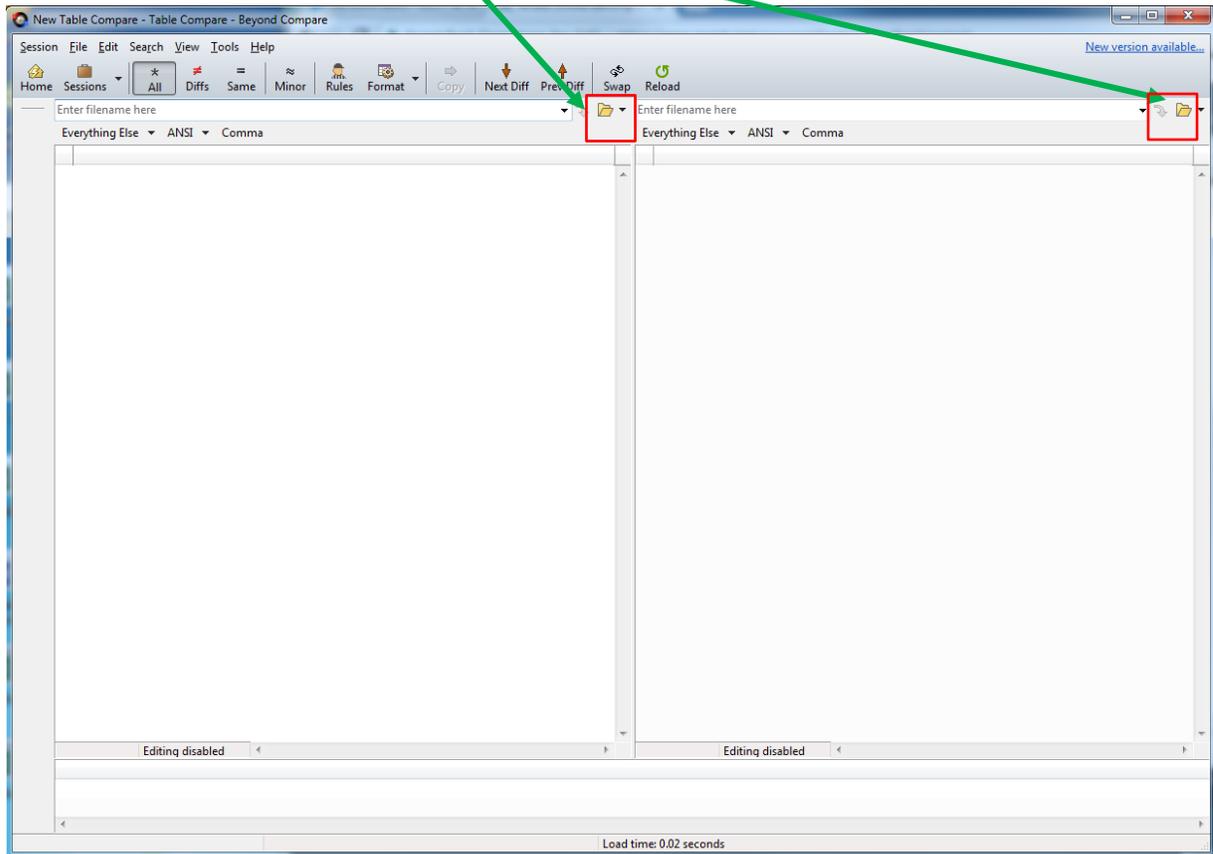
# Development Officer Handbook

Ver. 1.3

12 December 2018

---

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.

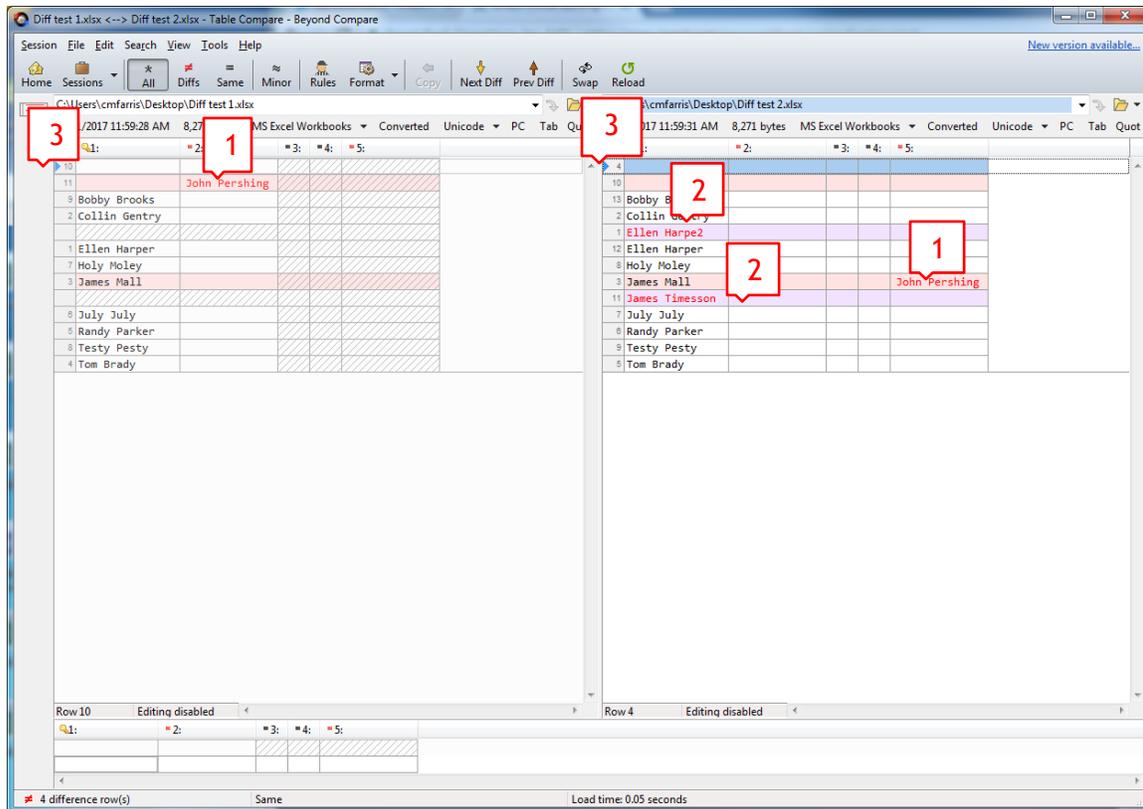


# Development Officer Handbook

Ver. 1.3

12 December 2018

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



## NOTES

- John Pershing shows up in both spreadsheets BUT they are not in the same column so they do NOT match.
- 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.
- 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.
- 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.

---

# *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

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

---

## *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

- ❖ **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**

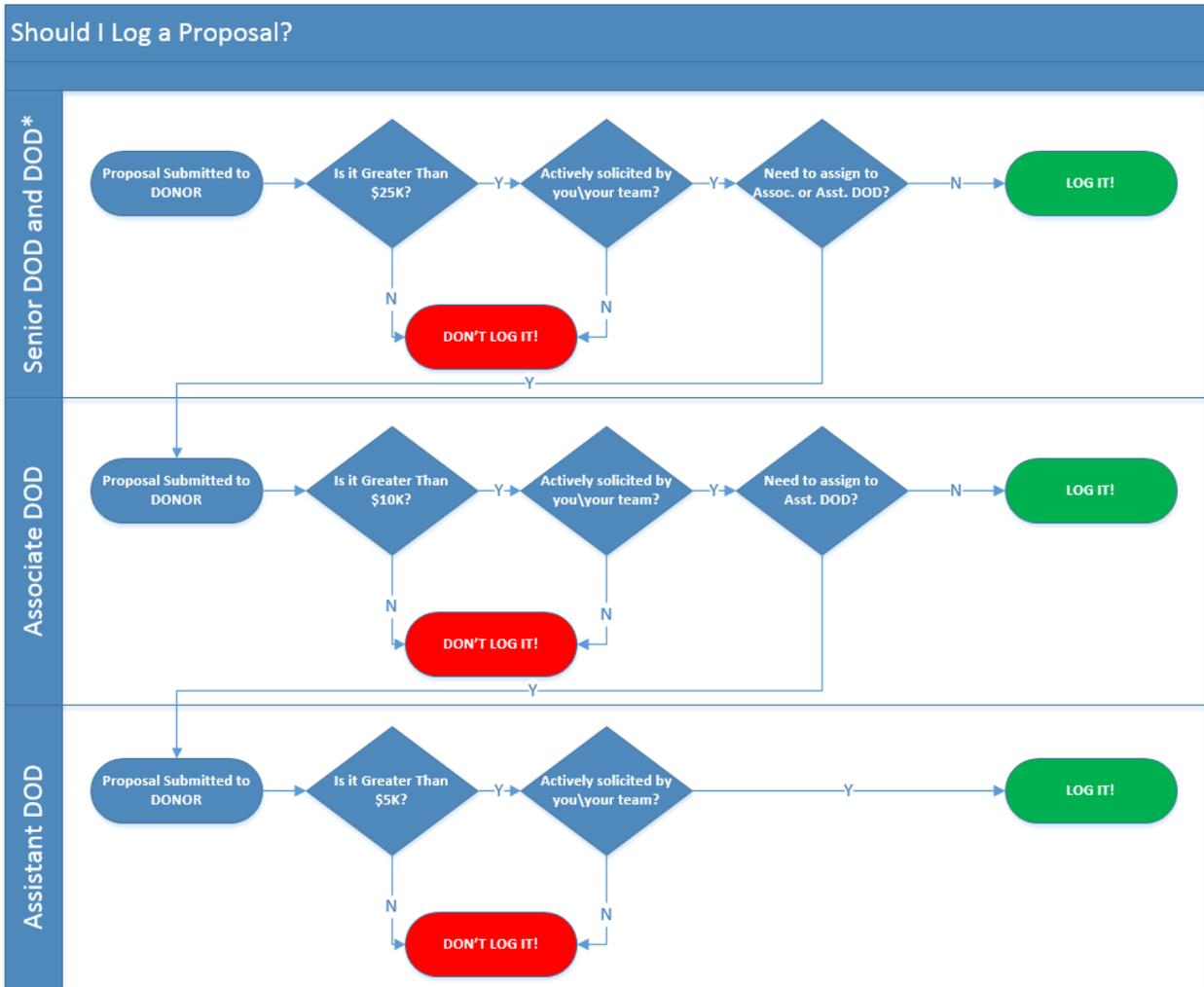
# Appendix 2: Proposal Flowchart

# Development Officer Handbook

Ver. 1.3

12 December 2018

## 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

# Development Officer Handbook

Ver. 1.3

12 December 2018

	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
<b>CTRL</b>				Close Window	<b>CTRL</b>					<b>CTRL</b>				
<b>ALT</b>	Context Site Help			Close Advance	<b>ALT</b>	Ctrl + U - Open Parent Window				<b>ALT</b>		Alt + Dn Arrow - Open Dropdown List		
<b>SHIFT</b>	Site Help		Spouse Info.	Entity Lookup	<b>SHIFT</b>	Ctrl + I - Show Audit Information						Alt + Up Arrow - Open Dropdown List		

# Appendix 4: Foundation Account Code List

---

# Development Officer Handbook

Ver. 1.3

12 December 2018

---

## 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

---

# *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

<b>NON-GIFT REVENUE ACCOUNT CODES</b>				
---------------------------------------	--	--	--	--

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

---

## *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

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

---

## *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

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

---

## *Development Officer Handbook*

*Ver. 1.3*

*12 December 2018*

---

<b>EXPENSE ACCOUNT CODES USED BY FOUNDATION STAFF</b>				
---	--	--	--	--

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		

---

## Development Officer Handbook

Ver. 1.3

12 December 2018

---

<u>Acct Code</u>	<u>Acct Code Description</u>	<u>Account Category</u>	
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

---

## Development Officer Handbook

Ver. 1.3

12 December 2018

---

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

---

## Development Officer Handbook

Ver. 1.3

12 December 2018

---

	other financial databases.		
<b>AIMS</b>	All reporting and training.	<a href="http://aits.uark.edu">aits.uark.edu</a>	When you need to contact donors, have a special report request or need training on Advance, NOSS or Blackbaud.
<b>Proposals</b>	Entering and tracking Proposals in Advance.	<a href="mailto:proposal@uark.edu">proposal@uark.edu</a>	When you need to submit or update a proposal.