



Development Officer Refresher Training

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Advance Contact Reports

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Why are Contact Reports important?

History: Prospects are assigned to Development Officers, but the information yielded from those prospects is proprietary to the University of Arkansas. Contact Reports allow the University to keep a historic record of the communications between Development and its prospects.

Visibility: Contact Reports provide crucial information for the senior leadership of the University.

Performance: Contact Reports provide valuable information that facilitates professional growth opportunities for all Development Officers.



Viewing Contact Reports

An entity's Contact Reports can be viewed on the Entity Overview screen.

There are additional ways to view Contact Reports, but this is the best way to ensure you are viewing *all* existing Contact Reports for that entity.



Viewing Contact Reports

Perform a Lookup for the Entity.

Access the Entity Overview screen.

o - Entity x

Clear local Storage (TMS) | Purge Cache Chris Farris [Logoff]

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

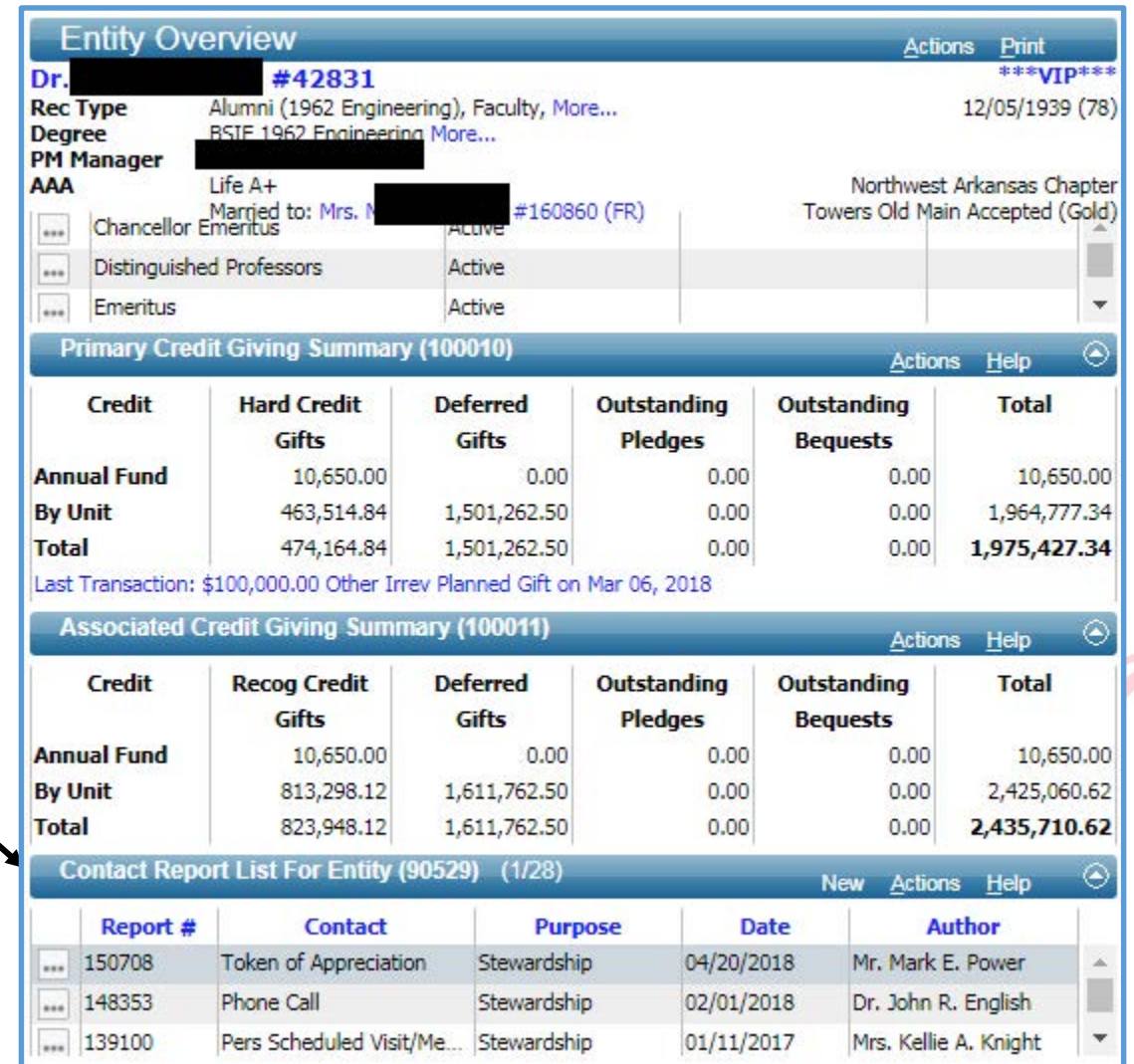
Entity Lookup (70036) Help

'Sounds Like'

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

Viewing Contact Reports

Contact Report List for Entity will appear beneath the Prospect Summary section on the Entity Overview page.



The screenshot displays the 'Entity Overview' page for a prospect. It includes sections for 'Primary Credit Giving Summary (100010)' and 'Associated Credit Giving Summary (100011)', both showing financial data. At the bottom, the 'Contact Report List For Entity (90529) (1/28)' is visible, listing reports with columns for Report #, Contact, Purpose, Date, and Author. An arrow from the text on the left points to this section.

Entity Overview [Actions](#) [Print](#)

Dr. [REDACTED] #42831 *****VIP***** 12/05/1939 (78)

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

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
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) (1/28) [New](#) [Actions](#) [Help](#)

Report #	Contact	Purpose	Date	Author
150708	Token of Appreciation	Stewardship	04/20/2018	Mr. Mark E. Power
148353	Phone Call	Stewardship	02/01/2018	Dr. John R. English
139100	Pers Scheduled Visit/Me...	Stewardship	01/11/2017	Mrs. Kellie A. Knight

Viewing Contact Reports

Contact Report List For Entity (90529) (1/20)							New	Actions	Help
	Report #	Contact	Purpose	Date	Author				
...	150708	Token of Appreciation	Stewardship	04/20/2018	Mr.				
...	148353	Phone Call	Stewardship	02/01/2018	Dr.				
...	139100	Pers. Scheduled Visit/Me.	Stewardship	01/11/2017	Mrs.				



Click ellipsis button to view detail of Contact Report



Adding Contact Reports

Use Contact Reports to record any interaction (phone calls, visits, etc.) with an Entity or Prospect.



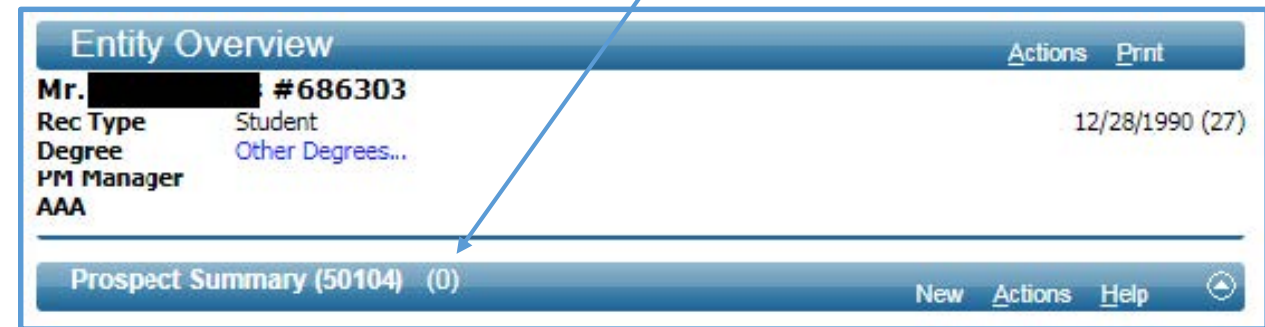
Adding Contact Reports

You can ascertain whether or not a Prospect Record exists by checking the Prospect Summary form on the Entity Overview screen.

If no Prospect Record exists for the Entity, then the Prospect Summary section will be blank.

Entities that require Prospect Records should be requested immediately from **Jason Selle** at selle@uark.edu.

Note the (0) Prospect Records.



The screenshot displays the 'Entity Overview' interface. At the top, there is a header bar with 'Entity Overview' on the left and 'Actions' and 'Print' on the right. Below this, the entity details are listed: 'Mr. [REDACTED] #686303', 'Rec Type Student', 'Degree Other Degrees...', 'PM Manager', and 'AAA'. On the right side of these details, the date '12/28/1990 (27)' is shown. A horizontal line separates the entity details from the 'Prospect Summary (50104) (0)' section at the bottom. The 'Prospect Summary' section has a header bar with 'Prospect Summary (50104) (0)' on the left and 'New', 'Actions', and 'Help' on the right. A blue callout box with an arrow points to the '(0)' in the 'Prospect Summary' header, indicating that there are no prospect records for this entity.

Adding Contact Reports

To record a Contact Report for an Entity, select the “New” button on the Contact Report List on the Entity Overview screen

Entity Overview [Actions](#) [Print](#)

Mr. Dane Farris #686303
Rec Type Student 12/28/1990 (27)
Degree Other Degrees...
PM Manager
AAA

Prospect Summary (50104) (0) [New](#) [Actions](#) [Help](#)

Affiliations (50103) (0) [Actions](#) [Help](#)

Primary Credit Giving Summary (100010) [Actions](#) [Help](#)

Credit	Hard Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	0.00	0.00	0.00	0.00	0.00
By Unit	20.00	0.00	0.00	0.00	20.00
Total	20.00	0.00	0.00	0.00	20.00

Last Transaction: \$20.00 Outright Gift on Apr 08, 2014

Associated Credit Giving Summary (100011) [Actions](#) [Help](#)

Credit	Recognized Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	0.00	0.00	0.00	0.00	0.00
By Unit	20.00	0.00	0.00	0.00	20.00
Total	20.00	0.00	0.00	0.00	20.00

Contact Report List For Entity (90529) (0) [New](#) [Actions](#) [Help](#)

Adding Contact Reports

All Contact Reports are visible at the Entity level because **all** Contact Reports **must** contain an Entity ID. NOTE*** “Joint” is checked by default but may be changed at your discretion.

The presence of a Prospect ID associates this Contact Report with the Entity’s Prospect Record.

Sometimes Contact Reports are added for an Entity before that Entity is identified as a Prospect; thus, in the earliest record of contact, there would have been no Prospect ID on the Contact Reports.

If this happens, the number of Contact Reports appearing on the Entity Overview screen vs. the Prospect Overview screen may differ.

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

- Report ID:** 0
- Date*:** 08/09/2018
- Contacted ID:** 42831
- Spouse ID:** 160860
- Joint:**
- Contact Type*:** (dropdown menu)
- Purpose*:** (dropdown menu)
- Unit:** UDE (dropdown menu) with "University Development" text below it.
- Author*:** (text input field)
- Description*:** (text input field)
- Text:** (large text area)
- Program:** (dropdown menu)
- Prospect ID:** 2662
- Proposal ID:** (text input field)
- Name*:** (text input field)
- Sort Name*:** (text input field)
- Title/Addr:** (text input field)

Arrows from the text on the left point to the "Contacted ID" field and the "Prospect ID" field in the form.

Adding Contact Reports

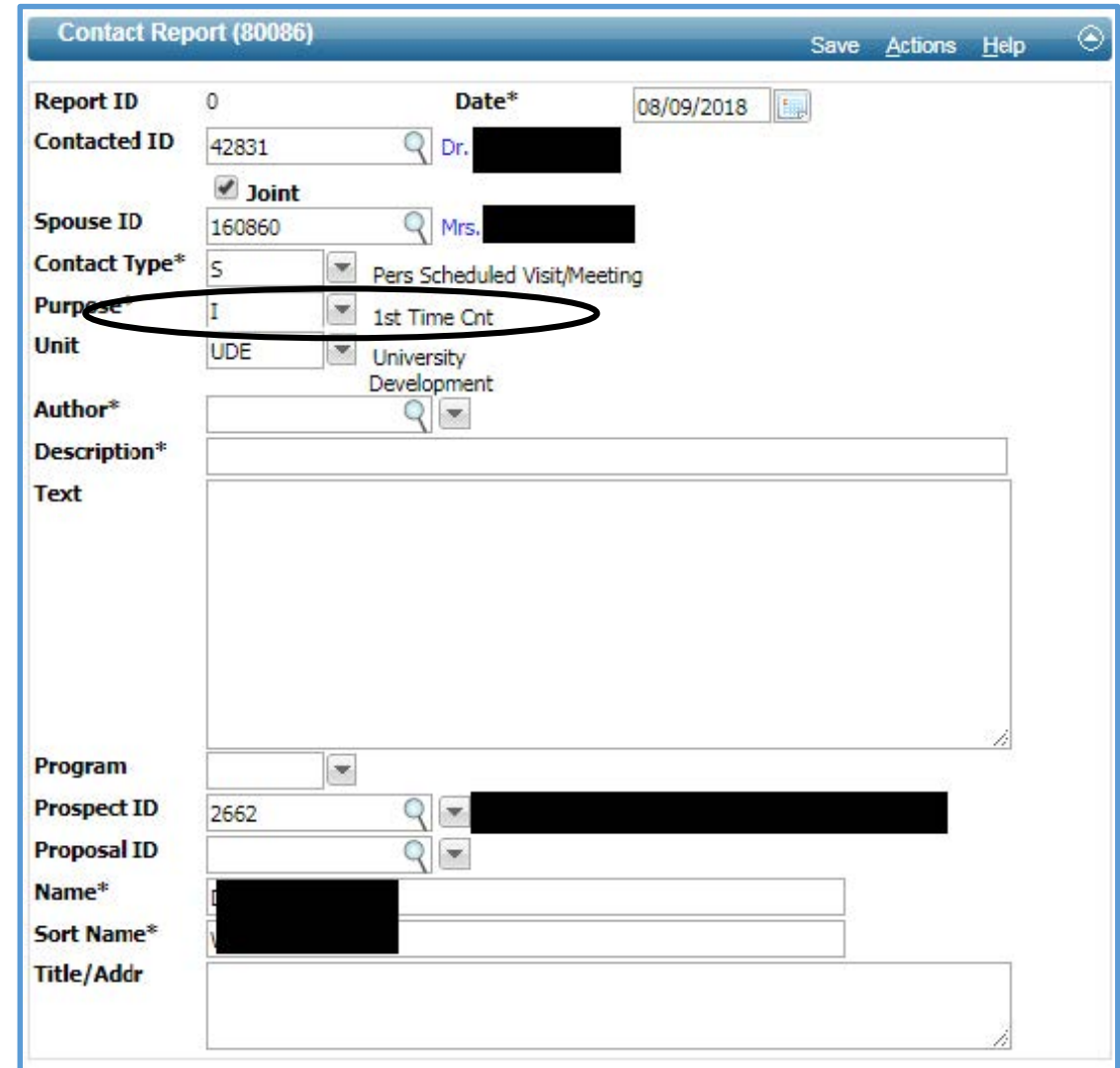
Contacted ID defaults to current entity ID/Name.

The Date field is used to record the **actual date of contact**. **NOTE**: It will default to today's date and will remain that way unless it is edited.

Enter a Contact Type (Personally Scheduled, Letter, Phone Call, etc.)

Enter the Purpose of the contact.

If this is the first time any Director of Development (DOD) has contacted this entity on U of A business, **select "1st Time Contact"** from the drop-down on the Purpose field.



The screenshot shows a web form titled "Contact Report (80086)" with a blue header bar containing "Save", "Actions", and "Help" buttons. The form fields are as follows:

- Report ID: 0
- Date*: 08/09/2018
- Contacted ID: 42831 (with a search icon) and "Dr." followed by a redacted name.
- Joint
- Spouse ID: 160860 (with a search icon) and "Mrs." followed by a redacted name.
- Contact Type*: 5 (dropdown menu) with "Pers Scheduled Visit/Meeting" below it.
- Purpose*: I (dropdown menu) with "1st Time Cnt" below it. This field is circled in red.
- Unit: UDE (dropdown menu) with "University Development" below it.
- Author*: (with a search icon)
- Description*: (text input field)
- Text: (large text area)
- Program: (dropdown menu)
- Prospect ID: 2662 (with a search icon) and a redacted name.
- Proposal ID: (with a search icon)
- Name*: (with a search icon) and a redacted name.
- Sort Name*: (with a search icon) and a redacted name.
- Title/Addr: (text input field)

Adding Contact Reports

Enter the ID of the DOD who made the contact in the Author field (additional staff persons can be recorded after the Contact Report has been saved).

Be as specific as possible in the Description.

Try to answer the following in Text:

- Who
- What
- When
- Where
- Why

Link the contact report to Proposal, if applicable.

Enter Contact Reports no later than the **5th of the next month.**

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

- Report ID:** 0
- Date*:** 08/09/2018
- Contacted ID:** 42831 (with a search icon and a redacted name "Dr. [REDACTED]")
- Joint**
- Spouse ID:** 160860 (with a search icon and a redacted name "Mrs. [REDACTED]")
- Contact Type*:** S (with a dropdown arrow) - Pers Scheduled Visit/Meeting
- Purpose*:** I (with a dropdown arrow) - 1st Time Cnt
- Unit:** UDE (with a dropdown arrow) - University Development
- Author*:** 667652 (with a search icon and a redacted name)
- Description*:** Meeting to discuss Campus Bounce Houses
- Text:** I met Dr. White at McDonalds to discuss the recent Bounce House initiative...
- Program:** (empty dropdown)
- Prospect ID:** 2662 (with a search icon and a redacted name "Fayetteville Campus")
- Proposal ID:** 19408 (with a search icon and a redacted name "Fayetteville Campus - - Outright Gift")
- Name*:** (redacted)
- Sort Name*:** (redacted)
- Title/Addr:** (empty text area)

Arrows from the instructions point to the Author field, the Description field, the Text field, and the Proposal ID field.

Adding Contact Reports

After saving your Contact Report, the navigation tree will contain links that enable you to record additional information.

Contact Report

Detail
Staff Credit 1
Tasks

Contact Report Actions Print

Mr. [REDACTED] #686303

Contact Type Pers Scheduled Visit/Meeting (Aug 09, 2018)
Purpose 1st Time Cnt

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.

i Save completed successfully

Contact Report (80086) Save New Actions Help

Report ID 151854 Date* 08/09/2018

Contacted ID 686303 Mr. [REDACTED]

Joint

Spouse ID

Contact Type* S Pers Scheduled Visit/Meeting

Purpose* I 1st Time Cnt

Adding Contact Reports

If more than one DOD should receive credit for this contact report, then click on the Staff Credit link in the navigation tree to add the other Directors of Development.

Contact Report

Detail
Staff Credit 1
Tasks

Contact Report

Mr. [REDACTED] #686303

Contact Type Pers Scheduled Visit/Meeting (Aug 09, 2018)
Purpose 1st Time Cnt

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.

Save completed successfully

Contact Report (80086)

Report ID 151854 Date* 08/09/2018

Contacted ID 686303 Mr. [REDACTED]

Joint

Spouse ID

Contact Type* S Pers Scheduled Visit/Meeting

Purpose* I 1st Time Cnt

Adding Contact Reports

Select “New” on the Contact Report Credit form.

Contact Report Credit Actions

Mr. [REDACTED] #686303
Contact Type Pers Scheduled Visit/Meeting (Aug 09, 2018)
Purpose 1st Time Cnt

Contact Report Credit (80080) (1/1) Save New Actions Help

Person Credited	Author	Credit	Participation
[REDACTED]	<input checked="" type="checkbox"/> Author	Visits	

Staff* 667652 [REDACTED]
Credit Type* 3 [REDACTED] Visits Author
Participation [REDACTED]
Unit [REDACTED]
Comment [REDACTED]

Adding Contact Reports

Select the DOD or other staff person who should receive credit for this contact from the drop-down menu on the 'Staff' field.

Select a Credit Type and Participation code.

Click 'Save' on the form header.

The screenshot shows a web form titled "Contact Report Credit" with an "Actions" link in the top right. The form contains the following information:

- Mr. [REDACTED] #686303
- Contact Type: Pers Scheduled Visit/Meeting (Aug 09, 2018)
- Purpose: 1st Time Cnt

Below this is a table with the following columns: Person Credited, Author, Credit, and Participation. The first row contains:

Person Credited	Author	Credit	Participation
Mrs. [REDACTED]	<input checked="" type="checkbox"/> Author	Visits	

At the bottom of the form, a dropdown menu is open for the "Staff*" field. The menu options are:

- (none)
- Mrs. [REDACTED] 932)
- Ms. [REDACTED]
- Ms. [REDACTED] ns (599300)
- Mrs. [REDACTED] 564004)

Other fields visible in the form include "Credit Type*", "Participation", "Unit", and "Comment". A "Save" button is located in the top right of the form header.

Reports & Tricks



Reports & Tricks

Contact Reports at the Entity Level

Access the “Contact Report” hyperlink in the Nav Tree under Prospect Tracking at the Entity Level.

Change the results format defaults to “Contact Report Lookup List.”

Lookups

- Saved Criteria...
- ▶ Biographic
- ▶ Event
- ▶ Gift
- ▼ Prospect Tracking
 - Assignment
 - Beneficiary
 - Category
 - Contact Person
 - Contact Rpt**
 - Cntract/Grant
 - Demographic
 - Evaluation
 - Interest
 - Note
 - Phil Affnty
 - Program
 - Proposal
 - Proposal Purpose
 - Prospects
 - Security

Contact Report 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

Contact Report (90048) Help

Contacted	Equal	<input type="text"/>
Name	Contains	<input type="text"/>
Contact Type	Equal	(All) <input type="text"/>
Purpose	Equal	(All) <input type="text"/>
Unit	Equal	(All) <input type="text"/>
Contact Credit ID	Equal	<input type="text"/>
Program	Equal	(All) <input type="text"/>
Author	Equal	<input type="text"/>
Joint	Equal	(All) <input type="text"/>
2nd ID	Equal	<input type="text"/>
Contact Date	Equal	<input type="text"/>

Reports & Tricks

Contact Reports at the Prospect Level

To search for all Prospects you have contacted:

1. Change “Choose a Template (optional)” to Prospect – Contact Report
2. Change “Select Results Format” to Prospect Lookup List
3. Enter your ID in the “Contact Credit ID” field of the search

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

Contact Report Lookup (70047) Help ↻

Contacted	Equal	<input type="text"/>
Contact Type	Equal	(All) <input type="text"/>
Purpose	Equal	(All) <input type="text"/>
Unit	Equal	(All) <input type="text"/>
Contact Credit ID	Equal	667652 <input type="text"/> Mrs <input type="text"/>
Contact Start Date*	Greater Than	<input type="text"/>
Contact End Date	Less Than Equ	<input type="text"/>
Contact Credit Unit	Equal	(All) <input type="text"/>

Assignment Lookup (70100) Help ↻

Assignment Type	Equal	(All) <input type="text"/>
Assign Status	Equal	(All) <input type="text"/>
Assign ID	Equal	<input type="text"/>
Priority	Equal	(All) <input type="text"/>
Unit	Equal	(All) <input type="text"/>

Reports & Tricks

Crystal Reports also allows you to pull a list of all of your Report of Contacts

University of Arkansas Advance System Report
Report of Contacts by DOD Reports
August 03, 2017
Page 1 of 4

<u>Contact ID and Name</u>	<u>Contact Date</u>	<u>Contact Description</u>	<u>Top</u>	<u>Contact Type</u>	<u>Call Report Summary</u>
<u>Name</u>		<u>PM Manager</u>	<u>PrspStage</u>	<u>Rpt Purpose</u>	<u>AS GS</u>
0000220193 Mr. [REDACTED] on Jr. Mr. [REDACTED]	03/02/2016 Dallas TX	Meeting in Dallas [REDACTED]	N Active Cultivati	Pers Scheduled Visit Cultivation	Wants stronger Dear [REDACTED] helped with Job learned that the finds it's worth t employees find

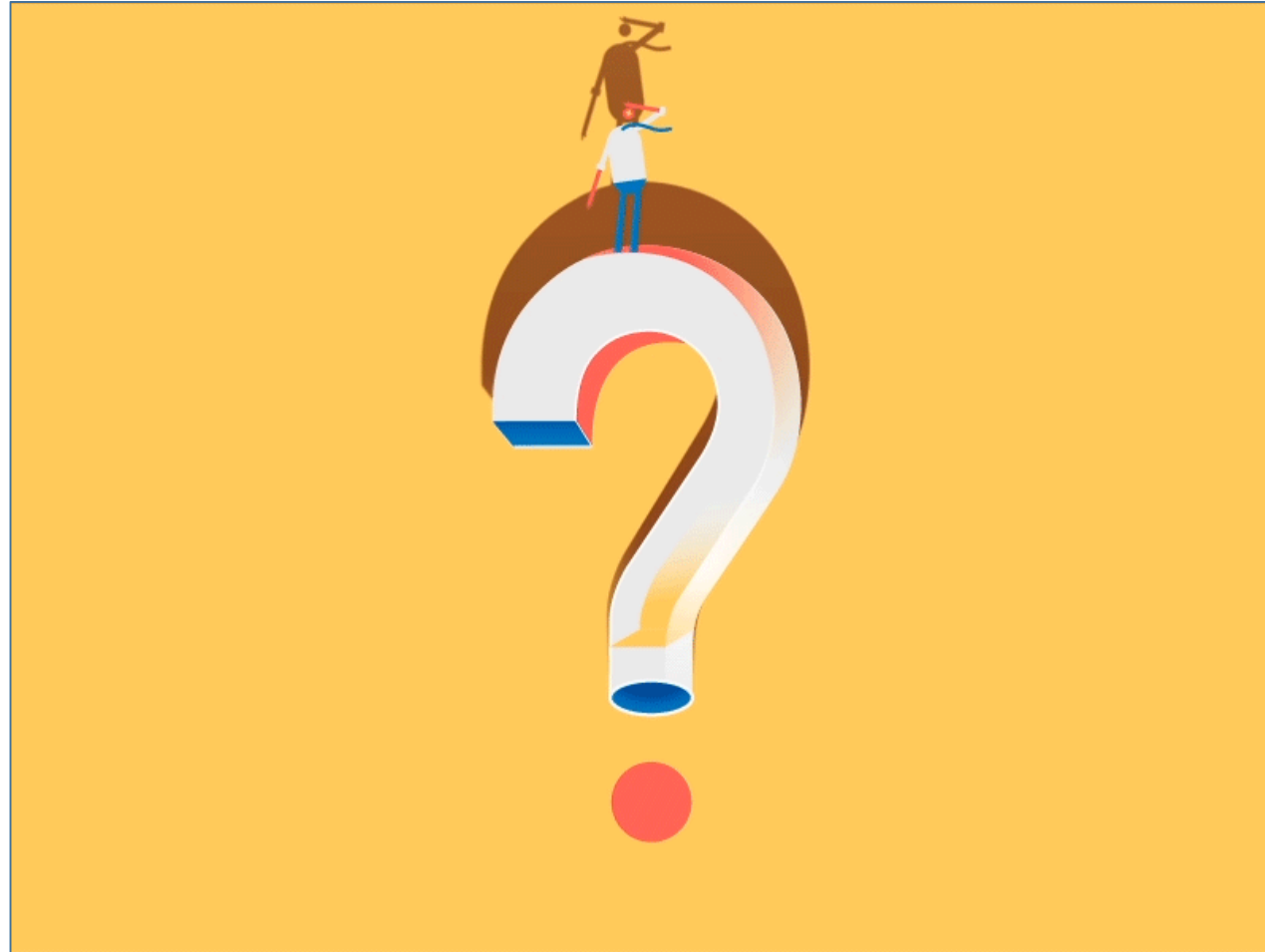
The inset window shows a file explorer view of the 'Reporting Outputs Folder' with the following files listed:

- UA - Blitz Report v2
- UA - Endowment Position Holders.
- UA - Entity Brief Bio
- UA - Entity Profile--Recent Version
- UA - Event Brief Bio
- UA - PMD Output
- UA Active Account Balances
- UA Committee Member Report
- UA Donor Summary Report.rpt
- UA Entity Detail Report
- UA Monthly PS Personally Schedule**
- UA Parent Giving Receipts with Da
- UA Pledge and Cash Flow Analysis
- UA Primary Manager Assignments
- UA Radius Proximity Report

Located in: Reporting Outputs Folder of Crystal.

Report Name: UA Monthly PS Personally
Schedule Contacts

Questions?



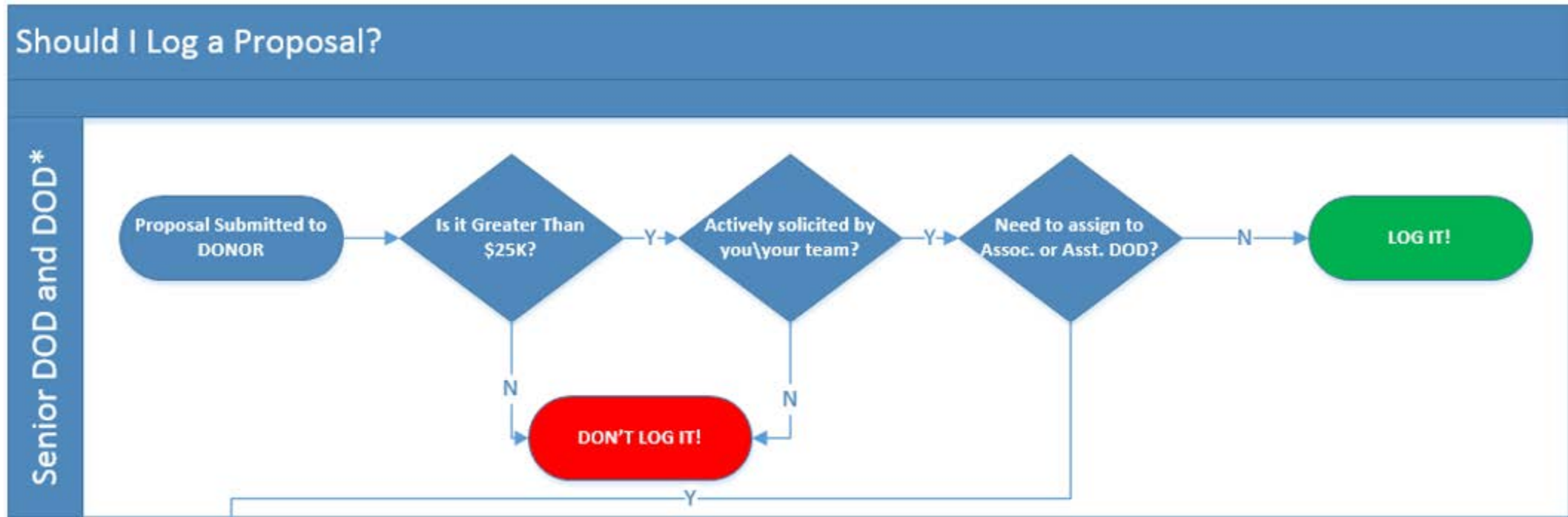
Proposals

Table of Contents

- ❖ Should I Log a Proposal?
- ❖ Proposal Submission Checklist
- ❖ Proposal Log Form



Should I Log a Proposal? (Part 1)



*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.

Should I Log a Proposal? (Part 2)



Should I Log a Proposal? (Part 3)



Tracking Proposals w/ Contact Reports

1. Select a CONTACT TYPE
2. Select a PURPOSE
 - **Solicitation Ask:** Donor was asked to financially support the university
 - **Solicitation Accepted:** Donor has agreed (verbally or in writing) to the ask and confirmed dollar amount
 - **Solicitation Declined:** Donor said no/rejected the ask OR the ask was administratively closed
 - **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*)

Contact Report (80086) Save Actions Help

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

Contacted ID: 197264 Mr. [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

- asks older than two years will be reviewed by UDEV leadership and the assigned PM
- administratively closed will be noted in subject line as ADMIN CLOSE

Tracking Proposals w/ Contact Reports

3. Select an AUTHOR
 - If there is a co-solicitor, select STAFF CREDIT from NAV Tree
 - Be sure to capture staff credit in the context as well
4. Add a DESCRIPTION
 - Ask amount should be stated first
 - Purpose should be stated second
 - Allocation should be stated third

Contact Report (80086) Save Actions Help

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

Contacted ID: 197264 Mr. [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

Examples of ROC

Solicitation Ask

\$1M Student Success Center Building

Solicitation Accepted

Accepted \$1M Student Success Center Building

Solicitation Declined

Declined \$1M Student Success Center Building

Tracking Proposals w/ Contact Reports

5. Enter TEXT

- Ask amount, purpose and allocation first
- Include descriptive items such as: outright gift, planned gift, program support, 5-year pledge, etc.
- Enter name for staff credit

Contact Report (80086) Save Actions Help

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

Contacted ID: 197264 Mr. [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

Proposal Manager (Jason Selle) will review ROC's weekly

Proposal Examples

DODs may create 4 types of Proposal Contact Reports

1. Solicitation Ask
2. Solicitation Accepted
3. Solicitation Declined
4. Solicitation Accepted but w/ Less than Ask Amount

Contact Report (80086) Save Actions Help

Report ID 0 Date* 10/15/2018

Contacted ID 197264 Mr. [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 ASK

Contact Report (80085) Save New Actions Help

Report ID 155357 Date* 10/22/2018

Contacted ID 197264 Mr. [REDACTED]

Joint

Spouse ID 197088 Mrs. [REDACTED]

Contact Type* T Phone Call

Purpose* N Solicitation Accepted

Unit UDE University Development

Author* 197264 Mr. [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 ACCEPTED

Contact Report (80086) Save Actions Help

Report ID 0 Date* 11/29/2018

Contacted ID 197264 Mr. [REDACTED]

Joint

Spouse ID 197088 Mrs. [REDACTED]

Contact Type* T Phone Call

Purpose* Q Solicitation Declined

Unit UDE University Development

Author* 197264 Mr. [REDACTED]

Description* Declined \$1M Student Success Center Building

Text Declined \$1M Student Success Center Building
Enter regular ROC details

Solicitation DECLINED

Contact Report (80086) Save Actions Help

Report ID 155360 Date* 10/22/2018

Contacted ID 197264 Mr. [REDACTED]

Joint

Spouse ID 197088 Mrs. [REDACTED]

Contact Type* E Email

Purpose* N Solicitation Accepted

Unit UDE University Development

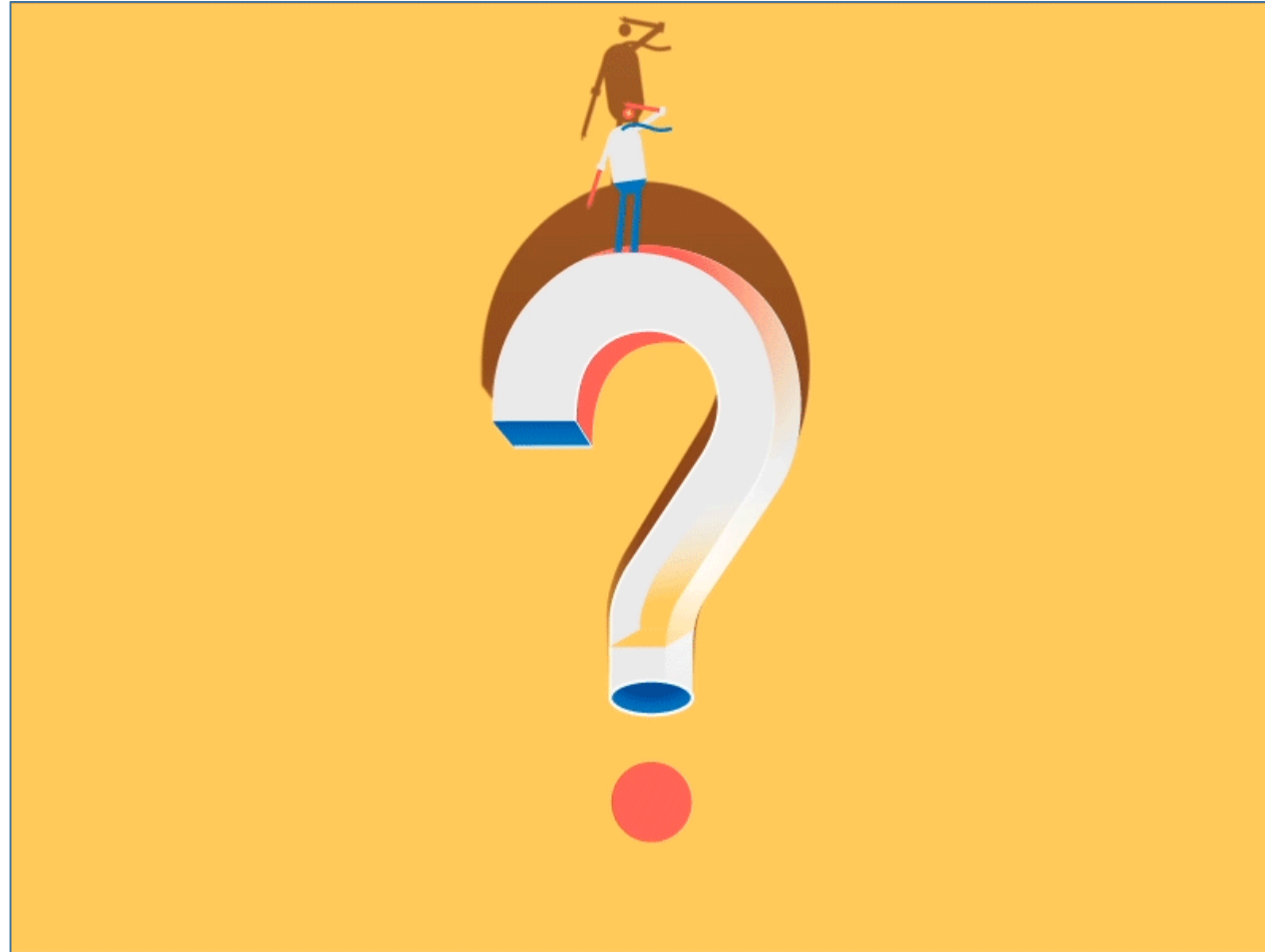
Author* 197264 Mr. [REDACTED]

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 ACCEPTED LESS

Questions?



How Are They Used?

DOD Metrics Summary Reports are delivered to Development Leadership every month on the 6th. They are used to track:

Unit Production

Print Date: 3/6/2018

University of Arkansas Goal Tracker Fiscal Year 2018 07/01/2017 -- 02/28/2018

GIVING

<u>Production</u>	\$5,406,074.12		<u>Receipts</u>	\$5,859,044.66		<u>Campaign</u>	\$168,899,702.41
Goal	<u>\$6,647,500.00</u>		Goal	<u>\$5,368,156.00</u>		Goal	<u>\$234,750,000.00</u>
Need	\$1,241,425.88	81.32% in 67% time	Need	-\$490,888.66	109.14% in 67% time	Need	\$65,850,297.59 71.95% in 71% time

Proposal Activity (Part 1)

PROPOSALS

<u>\$25K+ Proposals Asked</u>	2	150,000.00		<u>\$5K - \$24.9K Proposals Asked</u>	0	0.00
Funded:	1	50,281.22	50%	Funded:	0	0.00
Declined:	0	0.00		Declined:	0	0.00
Outstanding:	<u>1</u>	<u>100,000.00</u>		Outstanding:	<u>0</u>	<u>0.00</u>
<u>Goals: Solicitation Amounts: 100K+: 0 25K+: 0 10K+: 0 5K+: 12</u>				<u>Goal Setting Proposals Pending Solicitation:</u> 0 0.00		

<u>Previous Year \$25K+ Proposals Asked</u>	0	0.00		<u>\$5K - \$24.9K Proposals Asked</u>	0	0.00
Funded:	0	0.00	0%	Funded:	0	0.00
Declined:	0	0.00		Declined:	0	0.00
Outstanding:	<u>0</u>	<u>0.00</u>		Outstanding:	<u>0</u>	<u>0.00</u>

Proposal Activity (Part 2)

PROPOSAL DETAILS

Goals: Solicitation Amounts: 100K+: 0 25K+: 0 10K+: 0 5K+: 12

<u>Current Fiscal Year</u>					<u>Ask Amount</u>	<u>Granted Amt</u>	<u>Description</u>
25K+ Proposals							
PROSPECT NAME	24300	E	S	WCB	100,000.00	0.00	DESCRIPTION HERE
PROSPECT NAME	24319		F	UDE	50,000.00	50,281.22	
					<u>150,000.00</u>	<u>50,281.22</u>	
					<u>150,000.00</u>	<u>50,281.22</u>	
Grand Totals					<u>150,000.00</u>	<u>50,281.22</u>	

*****End of Proposals -- Page Forward for Contact Reports*****

Contact Report Details

CONTACT REPORT DETAILS

NAME 02/22/2018 Meeting with Anthony

NAME NAME Pers Scheduled Visit / Meeting General Cultivation Closing

and I meet Anthony at his . Anthony informed us that he has recently had back surgery and is recovery well. Anthony said within the last three months everyone but one of his sons has had to have some form of surgery. Anthony said this in good spirits as they are all doing fine now. Anthony also informed us that as of March 1st he will be promoted to VP of Investor Relations. He is excited for this new role and told us about all of what he will be managing.

invited Anthony to attend a football game this Fall. to set up a good weekend for them to visit.

NAME 02/23/2018 Lunch with John

NAME NAME Pers Scheduled Visit / Meeting General Cultivation Active Cultivation

I met John for lunch at the Royal Oaks Country Club. John knew of me through working previously at the Alumni Association. John is still involved in the chapter, specifically with the luncheons. We talked about John's time as of the Alumni Association, time with the Arkansas . His wife is an Ole' Miss grad and doesn't have any interest in the U of A.

We talked about his children and grandchildren. Being new to this role, John gave me a lot of advice in the fundraising area. He said he "knows my type" as he has met several development officers over the years. I told him I intend to stay around for a while. He offered to help me in any way from a connections stand point. I thanked him, and he gave me a few names to reach out to in the area. I thanked him for his support of the and asked if he'd like to meet some of the students. He said he would think about it.

He really enjoyed speaking with a few weeks ago and enjoys having speakers from all the across campus speak at the luncheon.

NAME 02/27/2018 Lunch with Bill

NAME NAME Pers Scheduled Visit / Meeting General Cultivation Active Cultivation

and I met Bill for lunch in . Bill had a mix up and was 30 minutes late. He was very apologetic. Bill told us about his time traveling all over the world in less than 80 days. His daughter recently got back from China, she moved over there for a job in marketing. She is home now and is interested in pursuing a master's degree at the U of A.

Bill asked us about our families and when we would bring up the campaign or All in for Arkansas, would divert to a different topic. I think Bill would be a good person to ask for an All-in for Arkansas match. We will continue visiting with him.

Advance Tasks

Table of Contents

- ❖ [Why are Tasks important?](#)
- ❖ [Create a Task](#)
- ❖ [Task Lookups](#)
- ❖ [Contact Info](#)



Why are Tasks important?

Shared communication with university leadership

- Chancellor and Vice Chancellor review Tasks for Donors
- Solicitation Plan
 - Action Items



Tool to assist with managing prospects

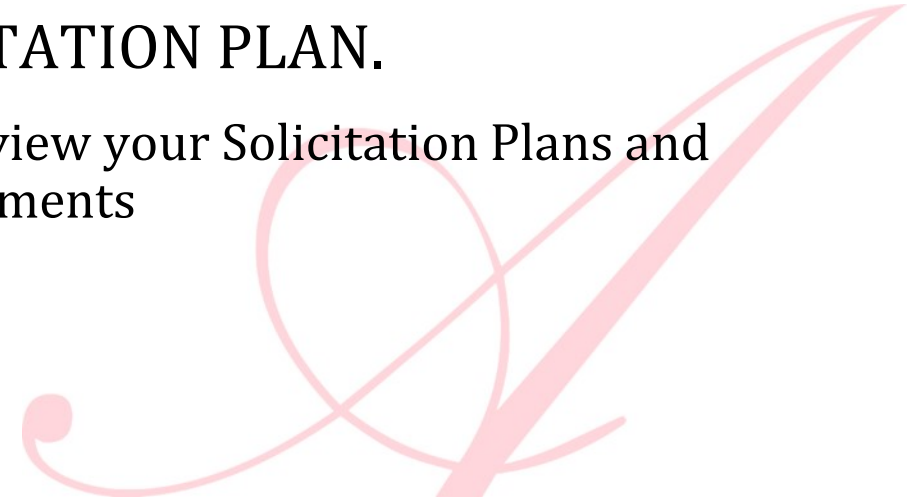
- Report with strategy and deadlines for Solicitation Plans and Action Items available



Important Task Notes

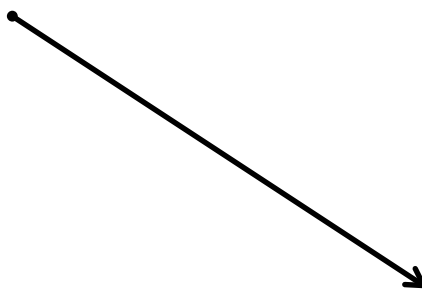


- There are 2 types of tasks:
 1. Solicitation Plan – Created as an **overall** strategic plan for soliciting a gift from a donor
 2. Action Item – Created to keep track of individual actions that need to be completed to **support** the Solicitation Plan
- **VERY IMPORTANT!!! THERE SHOULD BE A SOLICITATION 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



Create a Task

- Click on the “Task” link of the Prospect Overview to create the task



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

Prospect Tasks (Prospect #2662) Actions Print

Prospect Type Couple

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

Task	Status	Scheduled	Ended Date	Responsible
Information	Completed	09/30/2007	07/31/2016	#20798
Solicitation Plan	Completed	05/30/2002	09/08/2008	#20798

Task* Information

Status* Completed

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*

Contact Rpt



Past due and Pending Tasks will appear on your Home Screen in Advance!

My Pending Tasks (100008) (0) Actions Help

My Past Due Task (100403) (0) Actions Help

Create a Task Part 1

1) Click **New** on the Tasks form header 

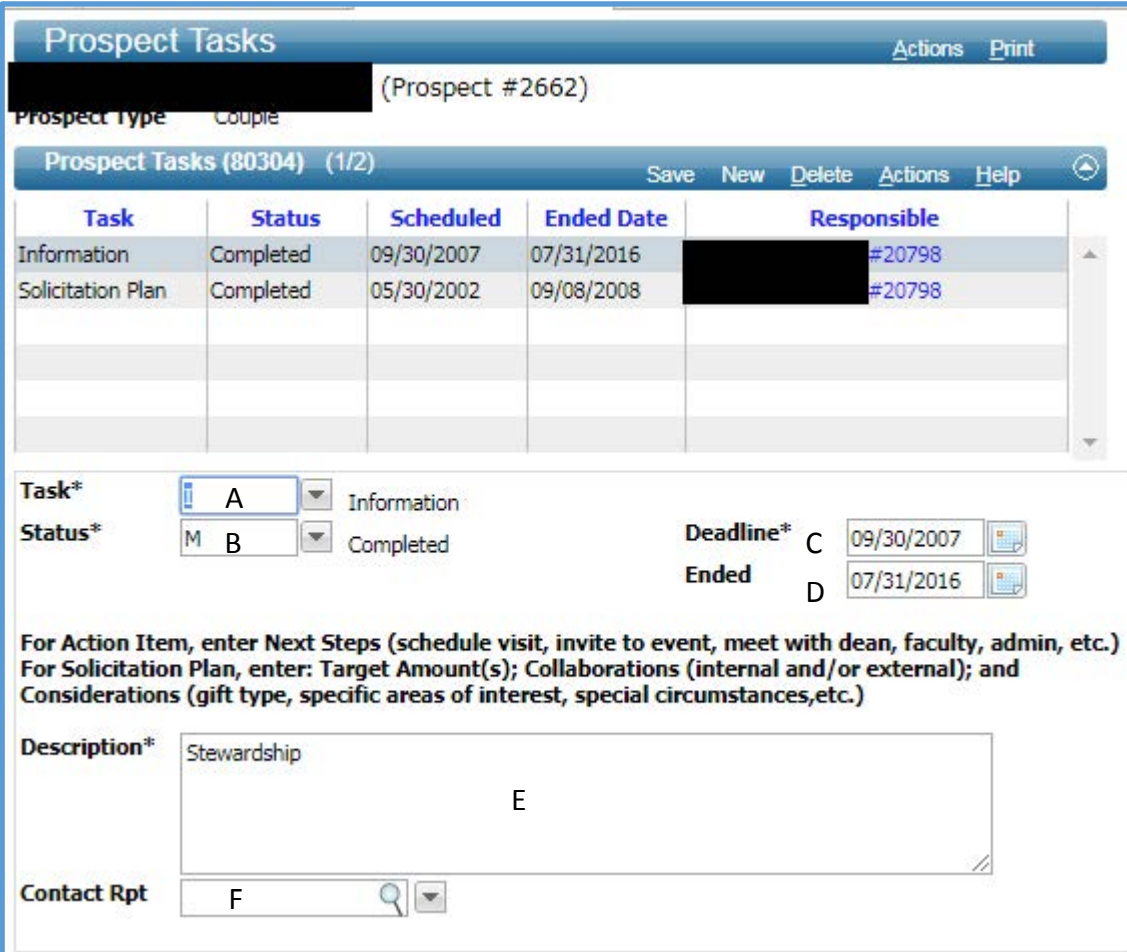
A. Choose a **Task*** Type:

- i. Solicitation Plan
- ii. Action Item

B. Set a **Status***

- i. **Pending**. Requires manual update by entry person.
- ii. **Cancelled**. Requires manual update by entry person.
- iii. **Complete**. Requires manual update by entry person. Requires adding an **Ended** date.
- iv. **Past Due**. Advance AUTOMATICALLY marks overdue tasks as **Past Due**.

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



The screenshot shows the 'Prospect Tasks' interface. At the top, there's a header with 'Prospect Tasks' and 'Actions Print'. Below that, a sub-header shows '(Prospect #2662)'. A table lists existing tasks:

Task	Status	Scheduled	Ended Date	Responsible
Information	Completed	09/30/2007	07/31/2016	#20798
Solicitation Plan	Completed	05/30/2002	09/08/2008	#20798

Below the table is a form for creating a new task. The 'Task*' dropdown is set to 'A' (Information). The 'Status*' dropdown is set to 'M B' (Completed). The 'Deadline*' field is set to 'C' (09/30/2007) and the 'Ended' field is set to 'D' (07/31/2016). The 'Description*' field contains 'Stewardship' and 'E'. The 'Contact Rpt' field is set to 'F'.

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.)

Continued Next Slide

Create a Task Part 2

D. Enter **Ended** Date when task is completed.

E. Enter the Task **Description*** following the rules for a Solicitation Plan or an Action Item.

i. Solicitation Plan:

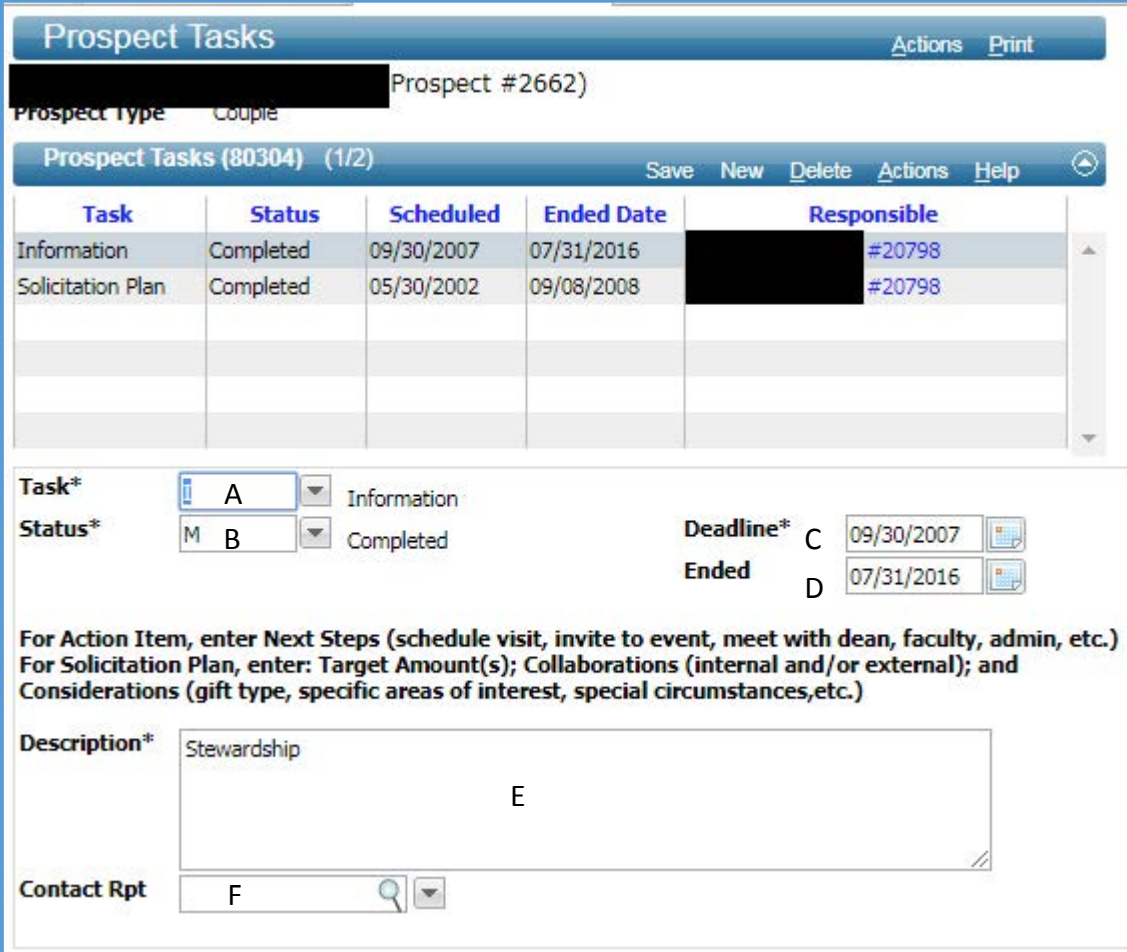
- i. Target Amount(s)
- ii. Collaborations (Internal and/or External)
- iii. Considerations (Gift Type, Areas of Interest, Special Circumstances, etc.)

ii. Action Item:

- 1) Next Steps
 - a. Schedule Visit
 - b. Invite to Event
 - c. Meet with Dean
 - d. Etc.

F. Link to **Contact Report** (If Exists)

G. Save new Task 



The screenshot shows the 'Prospect Tasks' interface. At the top, there's a header 'Prospect Tasks' with 'Actions' and 'Print' buttons. Below that, a sub-header shows 'Prospect #2662)'. A table lists existing tasks:

Task	Status	Scheduled	Ended Date	Responsible
Information	Completed	09/30/2007	07/31/2016	#20798
Solicitation Plan	Completed	05/30/2002	09/08/2008	#20798

Below the table is a form for creating a new task. It includes fields for 'Task*' (set to 'A'), 'Status*' (set to 'M B'), 'Deadline*' (set to 'C' with date '09/30/2007'), and 'Ended' (set to 'D' with date '07/31/2016'). A 'Description*' field contains the text 'Stewardship'. At the bottom, there is a 'Contact Rpt' field with the value 'F' and a search icon.

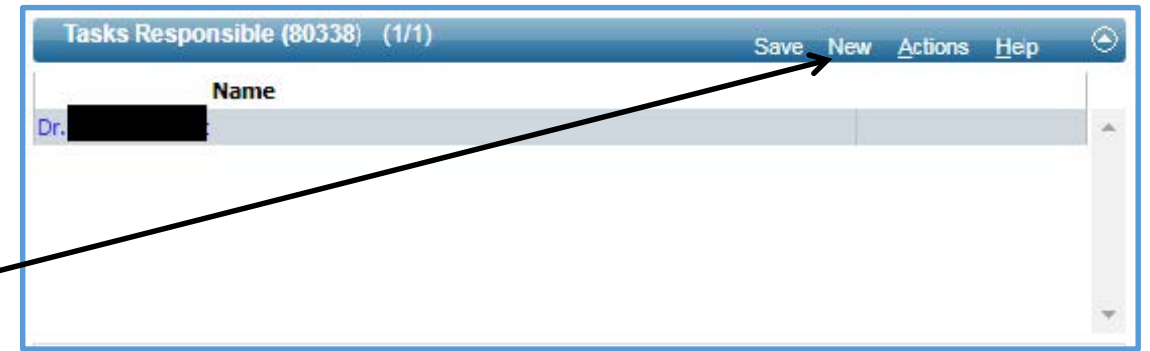
Continued Next Slide

Create a Task

➤ When multiple people are responsible for a task (i.e. Dean, Faculty, etc.) they need to be assigned to the task as well.

- Use the Tasks Responsible window to add these additional people.
- Click New.


Continued From Previous Slide Slide

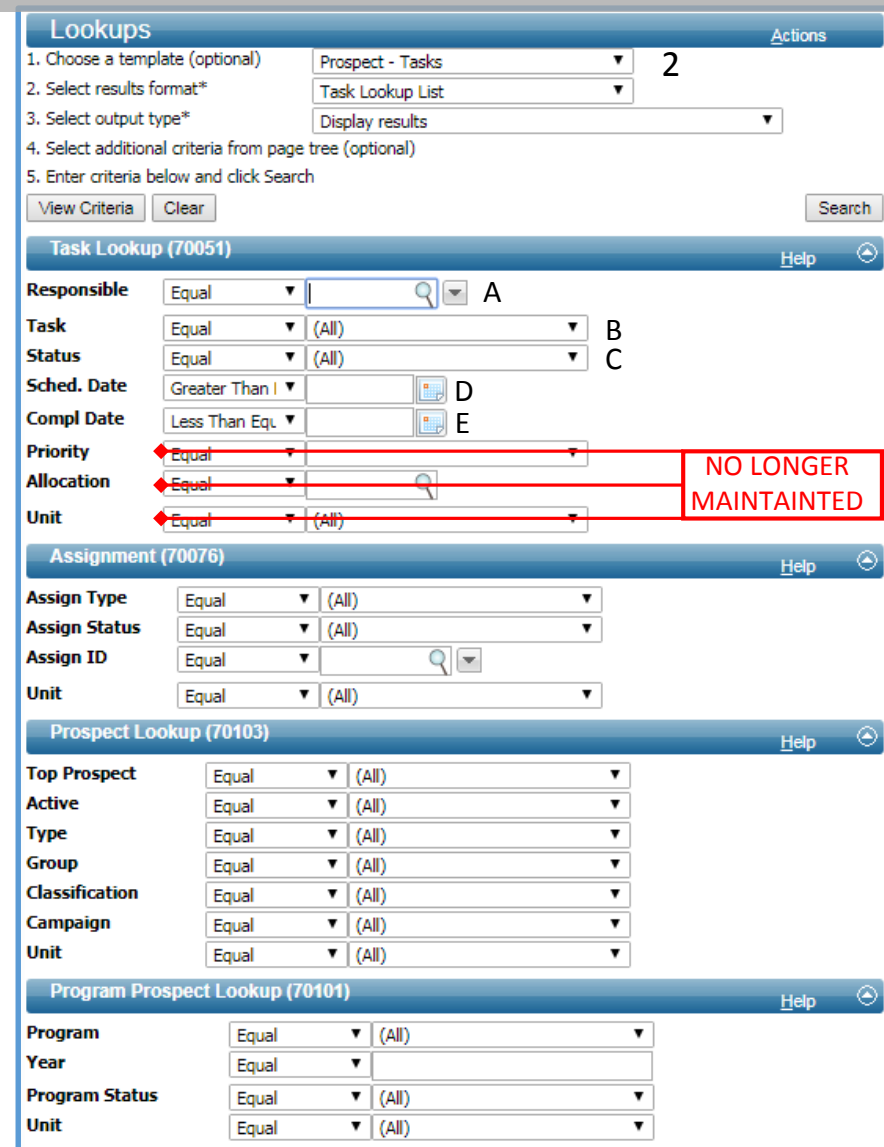


Past due and Pending Tasks will appear on your Home Screen in Advance!



Task Lookups

1. Access the **Lookups** application in Advance 
2. Change **Choose a template (optional)** to **Prospect-Tasks**.
 - A. Enter the ID of Entity **Responsible** for the Task
 - B. Use **Task** to choose between:
 - a) **Solicitation Plan**
 - b) **Action Item**
 - C. Use **Status** to choose between:
 - a) **Cancelled**
 - b) **Completed**
 - c) **Past Due**
 - d) **Pending**
 - D. Use **Sched. Date** to find Tasks by Deadline date.
 - E. Use **Compl Date** to find Tasks by their Ended date.



The screenshot displays the 'Lookups' application interface. At the top, there is a 'Lookups' header with an 'Actions' button. Below this, a list of steps is provided: 1. Choose a template (optional) - Prospect - Tasks; 2. Select results format* - Task Lookup List; 3. Select output type* - Display results; 4. Select additional criteria from page tree (optional); 5. Enter criteria below and click Search. There are 'View Criteria' and 'Clear' buttons, and a 'Search' button.

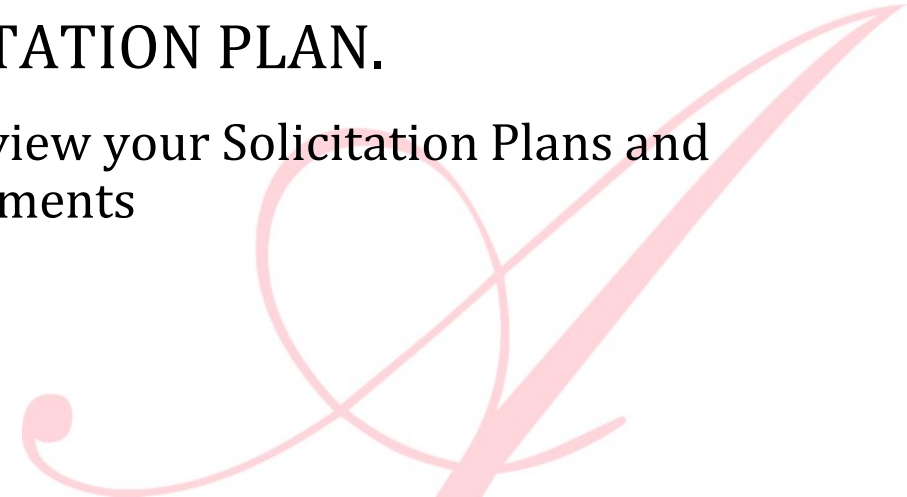
The main content area shows four lookup forms, each with a 'Help' button:

- Task Lookup (70051)**: Fields include Responsible (Equal, A), Task (Equal, (All), B), Status (Equal, (All), C), Sched. Date (Greater Than, D), Compl Date (Less Than Equ, E), Priority (Equal), Allocation (Equal), and Unit (Equal, (All)). A red box highlights the Priority, Allocation, and Unit fields with the text 'NO LONGER MAINTAINED'.
- Assignment (70076)**: Fields include Assign Type (Equal, (All)), Assign Status (Equal, (All)), Assign ID (Equal), and Unit (Equal, (All)).
- Prospect Lookup (70103)**: Fields include Top Prospect (Equal, (All)), Active (Equal, (All)), Type (Equal, (All)), Group (Equal, (All)), Classification (Equal, (All)), Campaign (Equal, (All)), and Unit (Equal, (All)).
- Program Prospect Lookup (70101)**: Fields include Program (Equal, (All)), Year (Equal), Program Status (Equal, (All)), and Unit (Equal, (All)).

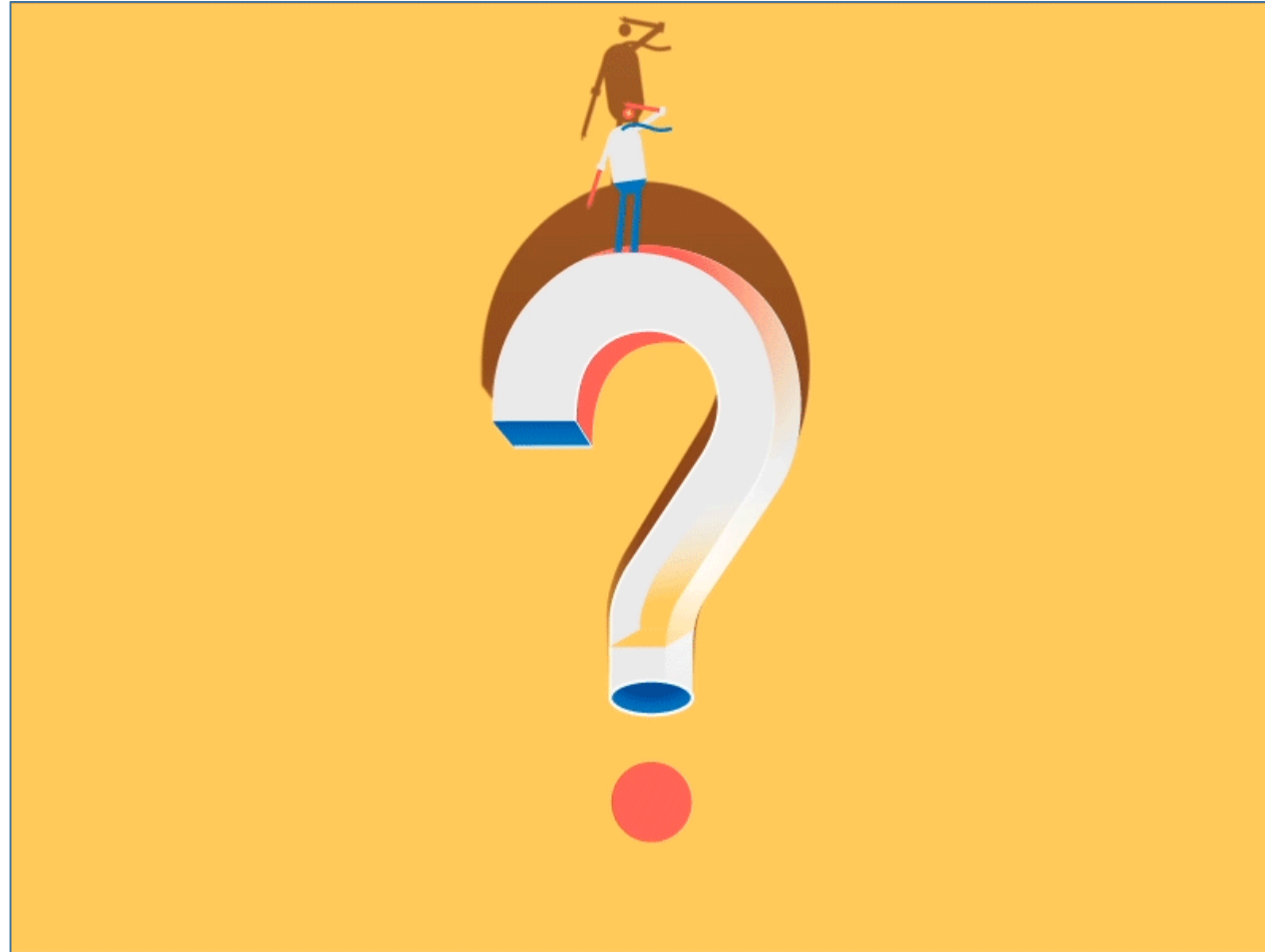
Important Task Reminder



- There are 2 types of tasks:
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Questions?



Crystal Reports Edge Server

Table of Contents

- ❖ [How to log in to Crystal Reports Server \(CRS\).](#)
- ❖ [How to navigate the CRS InfoView environment.](#)
- ❖ [How to change your password for CRS](#)

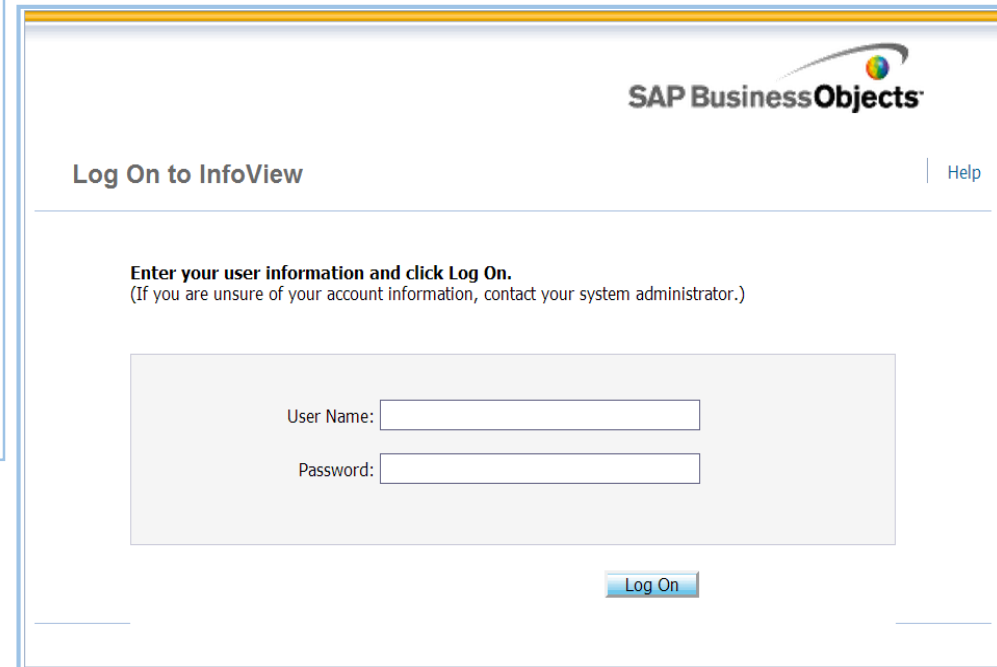


Log in to Crystal Reports Server

To access CRS, please use the following web address:

<http://aits.uark.edu> and click on “*Crystal Reports on the EDGE Server*” at the right side of screen

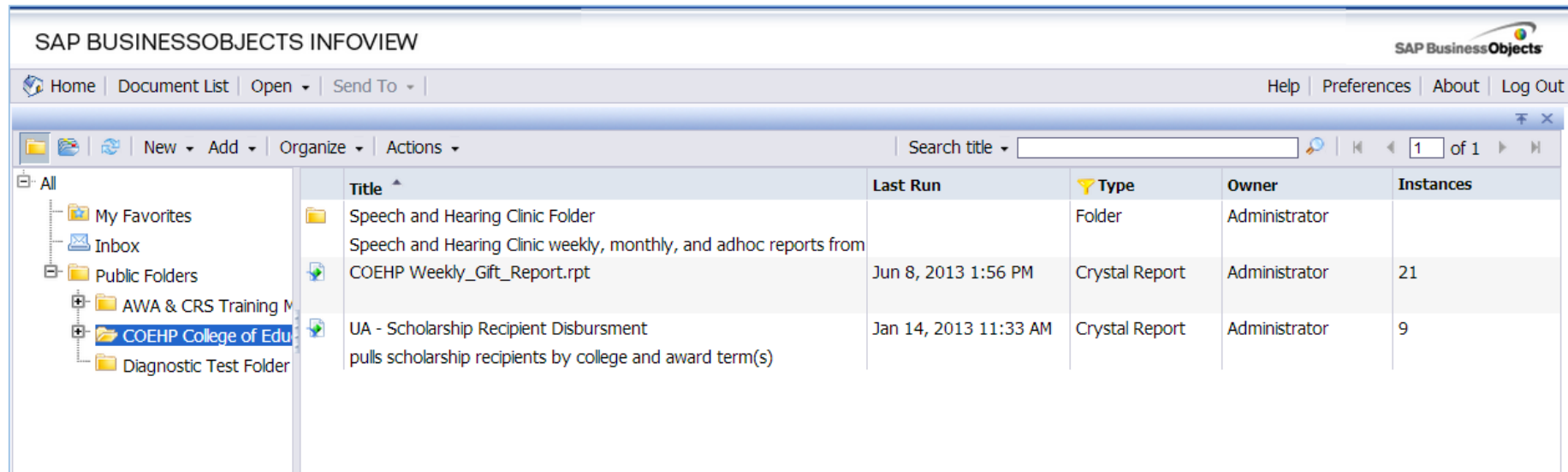
- Your CRS user name is the same as your uark ID (the first part of your uark email)
- Your initial CRS password is **uark01**
- ❖ **You will be required to change this password when you first log on. If this is your first time to log in.**



The screenshot shows the SAP BusinessObjects login interface. At the top right is the SAP BusinessObjects logo. Below it, the text "Log On to InfoView" is displayed on the left, and a "Help" link is on the right. A horizontal line separates the header from the main content area. The main content area contains the instruction: "Enter your user information and click Log On. (If you are unsure of your account information, contact your system administrator.)". Below this instruction is a light gray rectangular box containing two input fields: "User Name:" followed by a text input field, and "Password:" followed by a text input field. At the bottom center of this box is a blue "Log On" button.

Report Folders

After logging in, you will be taken to the folder that has the reports available to you.



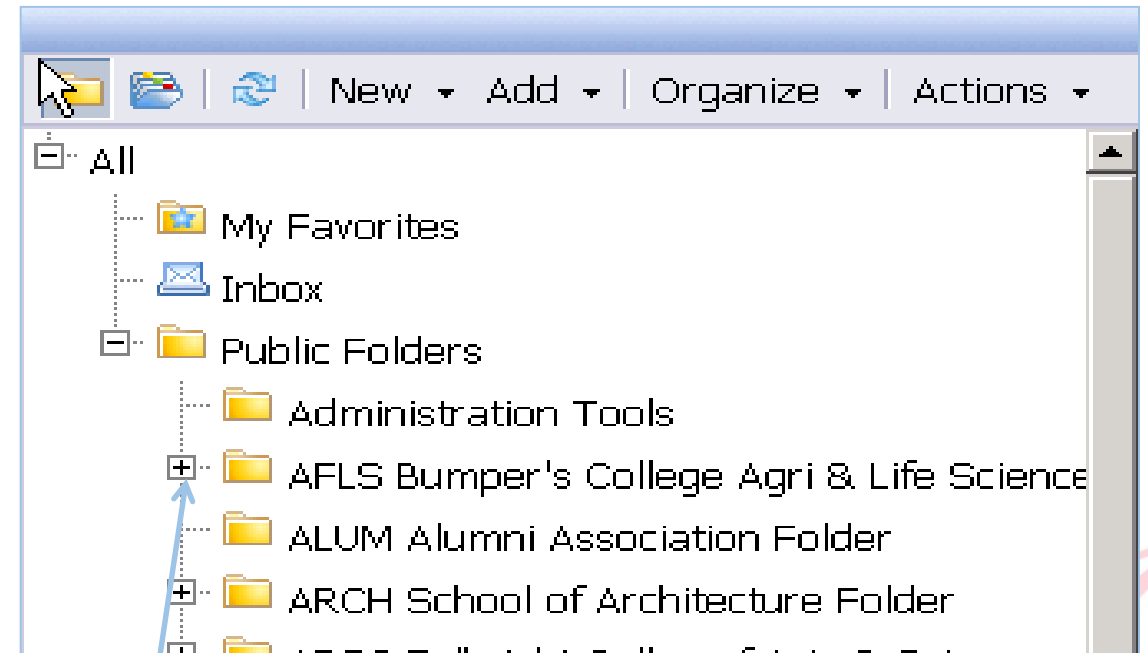
The screenshot displays the SAP BusinessObjects InfoView interface. The left pane shows a folder tree with 'COEHP College of Edu' selected. The right pane shows a table of reports with the following data:

Title	Last Run	Type	Owner	Instances
Speech and Hearing Clinic Folder		Folder	Administrator	
Speech and Hearing Clinic weekly, monthly, and adhoc reports from COEHP Weekly_Gift_Report.rpt	Jun 8, 2013 1:56 PM	Crystal Report	Administrator	21
UA - Scholarship Recipient Disbursement pulls scholarship recipients by college and award term(s)	Jan 14, 2013 11:33 AM	Crystal Report	Administrator	9

Navigating

If the report you need is in your top-level folder, click the “+” next to your folder to reveal subfolders.

- Users at the college level may view reports in departmental subfolders.
- Users in departmental subfolders only have access to their own reports.



Click here to view subfolders

Navigating

Once the subfolder is displayed, single-click on the folder to view its contents.



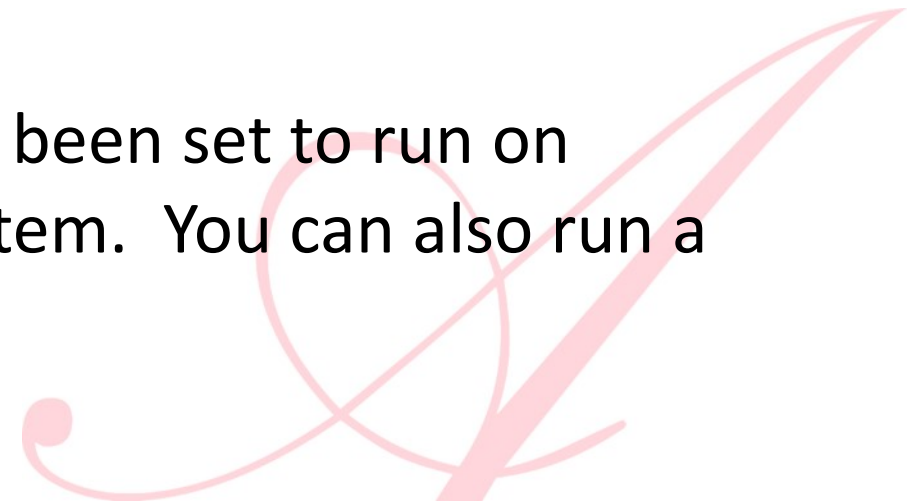
Daily_Summary_Report.rpt	Aug 26, 2009 11:10 PM	Crystal Report	Administrator	367
Daily Summary Report for Receipts and				
HC_Gift_Entity_Type.rpt	Aug 4, 2009 4:41 PM	Crystal Report	Administrator	8
All Hard Credit Receipts by Unit then Ent				
HC_Gift_Type.rpt	Jul 31, 2009 11:06 PM	Crystal Report	Administrator	23
All HC Receipts by Unit then Gift Type fo				
HC_Purpose.rpt	Jul 31, 2009 11:18 PM	Crystal Report	Administrator	16
All HC Receipts by Unit then Gift Purpose				
HC_Receipts_Goals_by_Source_Summar	Jul 31, 2009 11:10 PM	Crystal Report	Administrator	20
Summary of All HC Receipts by Unit and				
Production Goals by Source for Admin.rp	Jul 31, 2009 11:30 PM	Crystal Report	Administrator	14
Same report as Production Goals by Sou				

Click here to view a list of reports in the subfolder.

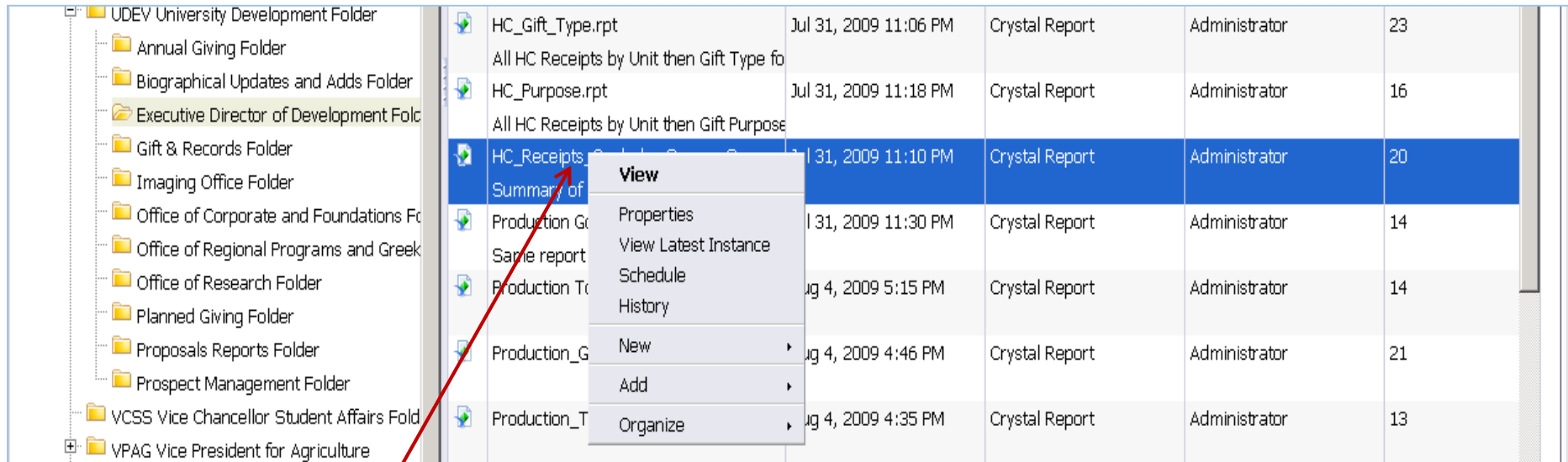
Running a Report

There are several options when viewing a report(right click)

- View Latest Instance:** Display the most recently run instance of your report. To ensure getting the correct report, always view the “**History**” of the report for the appropriate instance. NOT SUGGESTED.
- History:** Displays a list of the last 20 instances (runs) of your report. Select the one you want to view from the list.
- Schedule:** Weekly gift report schedule has already been set to run on Saturday, when fewer users are logged into the system. You can also run a report “on the fly.”



Viewing History or Scheduling Report

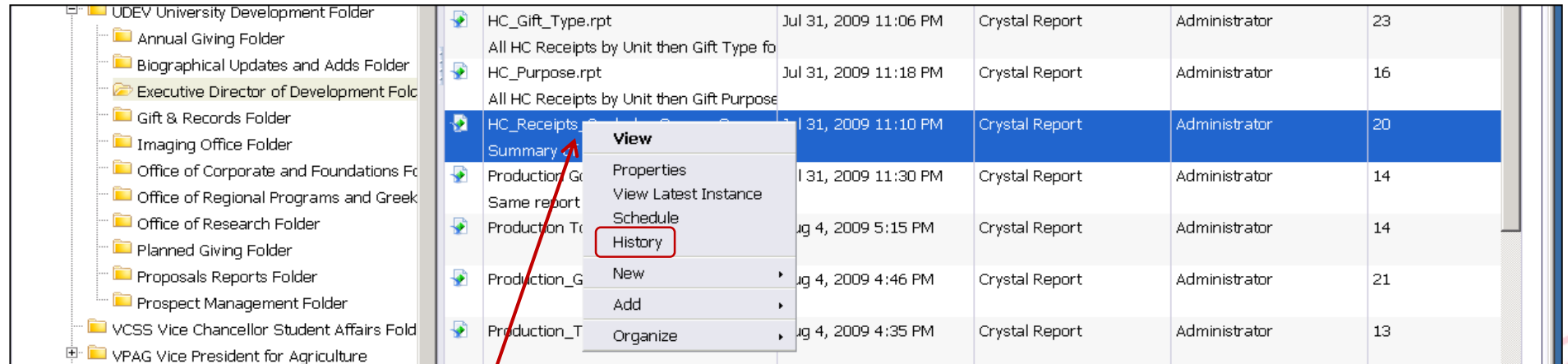


HC_Gift_Type.rpt	Jul 31, 2009 11:06 PM	Crystal Report	Administrator	23
All HC Receipts by Unit then Gift Type fo				
HC_Purpose.rpt	Jul 31, 2009 11:18 PM	Crystal Report	Administrator	16
All HC Receipts by Unit then Gift Purpose				
HC_Receipts	Jul 31, 2009 11:10 PM	Crystal Report	Administrator	20
Summary of				
Production G	Jul 31, 2009 11:30 PM	Crystal Report	Administrator	14
Same report				
Production T	Aug 4, 2009 5:15 PM	Crystal Report	Administrator	14
Production_G	Aug 4, 2009 4:46 PM	Crystal Report	Administrator	21
Production_T	Aug 4, 2009 4:35 PM	Crystal Report	Administrator	13

You must right-click your mouse on the report to get the Schedule and History options in a drop down box.

Viewing your Report History

Clicking on the word “History” will display a list of the last 20 instances of your report that have run.



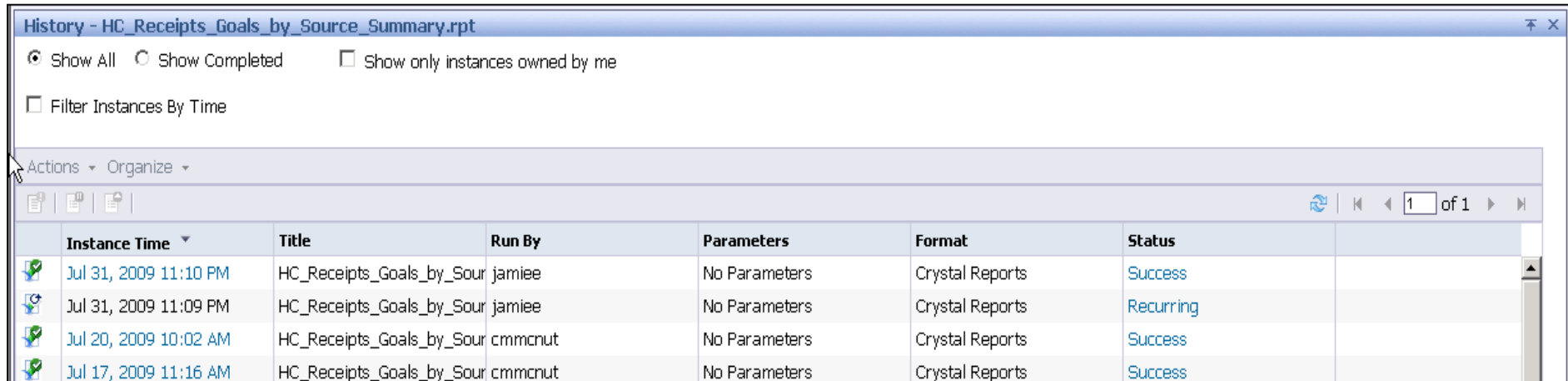
Report Name	Date/Time	Report Type	User	Count
HC_Gift_Type.rpt All HC Receipts by Unit then Gift Type fo	Jul 31, 2009 11:06 PM	Crystal Report	Administrator	23
HC_Purpose.rpt All HC Receipts by Unit then Gift Purpose	Jul 31, 2009 11:18 PM	Crystal Report	Administrator	16
HC_Receipts_Summary.rpt	Jul 31, 2009 11:10 PM	Crystal Report	Administrator	20
Production_G... Same report	Jul 31, 2009 11:30 PM	Crystal Report	Administrator	14
Production_T...	Aug 4, 2009 5:15 PM	Crystal Report	Administrator	14
Production_G...	Aug 4, 2009 4:46 PM	Crystal Report	Administrator	21
Production_T...	Aug 4, 2009 4:35 PM	Crystal Report	Administrator	13

You must right-click your mouse on the report to get the View, Properties, View Latest Instance, and History options in a drop down box.





The History View

The History View displays...

- ✓ **Instance Time:** The date and time when the report was run
- ✓ **Title:** The title of the report
- ✓ **Run By:** The user who ran or scheduled the report



The screenshot shows a window titled "History - HC_Receipts_Goals_by_Source_Summary.rpt". It includes filter options: "Show All" (selected), "Show Completed", and "Show only instances owned by me". There is also a "Filter Instances By Time" checkbox. Below the filters is a toolbar with "Actions" and "Organize" menus, and a refresh button. The main area contains a table with the following data:

	Instance Time	Title	Run By	Parameters	Format	Status
	Jul 31, 2009 11:10 PM	HC_Receipts_Goals_by_Sour	jamiee	No Parameters	Crystal Reports	Success
	Jul 31, 2009 11:09 PM	HC_Receipts_Goals_by_Sour	jamiee	No Parameters	Crystal Reports	Recurring
	Jul 20, 2009 10:02 AM	HC_Receipts_Goals_by_Sour	cmmcnut	No Parameters	Crystal Reports	Success
	Jul 17, 2009 11:16 AM	HC_Receipts_Goals_by_Sour	cmmcnut	No Parameters	Crystal Reports	Success

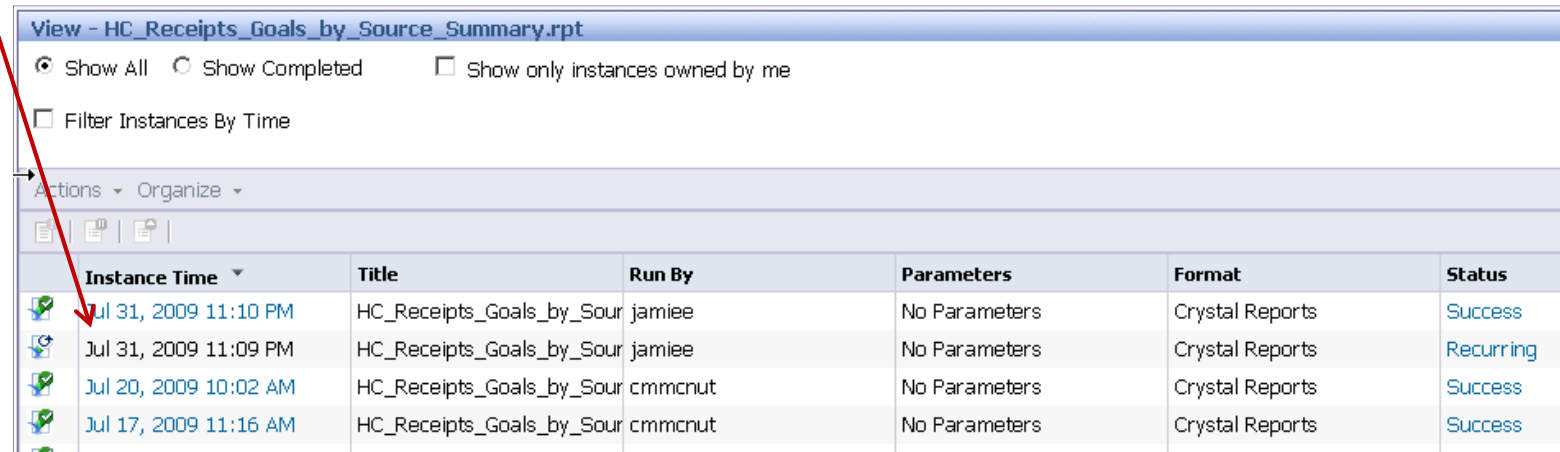
The History View, cont.

- ✓ **Format:** Set to Excel
- ✓ **Status:** Individual instances will display “Success” in the status column. Your regularly scheduled report will display “Recurring.”
- ✗ **Reschedule:** This option is now part of the “Right-Click” on the Report, and is not available on the History section.

Instance Time	Title	Run By	Parameters	Format	Status
Jul 31, 2009 11:10 PM	HC_Receipts_Goals_by_Sour	jamiee	No Parameters	Crystal Reports	Success
Jul 31, 2009 11:09 PM	HC_Receipts_Goals_by_Sour	jamiee	No Parameters	Crystal Reports	Recurring
Jul 20, 2009 10:02 AM	HC_Receipts_Goals_by_Sour	cmmcnut	No Parameters	Crystal Reports	Success
Jul 17, 2009 11:16 AM	HC_Receipts_Goals_by_Sour	cmmcnut	No Parameters	Crystal Reports	Success

Retrieving a Report from History

To reopen a previously run instance, click on the instance time hyperlink.

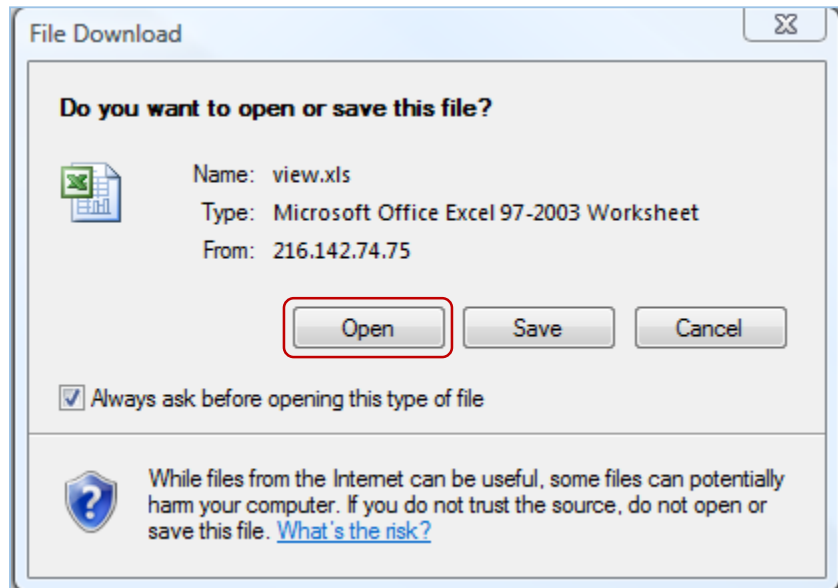


The screenshot shows a report history interface for 'View - HC_Receipts_Goals_by_Source_Summary.rpt'. It includes filter options for 'Show All', 'Show Completed', and 'Show only instances owned by me'. Below the filters is a table with columns for Instance Time, Title, Run By, Parameters, Format, and Status. A red arrow points to the 'Instance Time' column header.

Instance Time	Title	Run By	Parameters	Format	Status
Jul 31, 2009 11:10 PM	HC_Receipts_Goals_by_Sour	jamiee	No Parameters	Crystal Reports	Success
Jul 31, 2009 11:09 PM	HC_Receipts_Goals_by_Sour	jamiee	No Parameters	Crystal Reports	Recurring
Jul 20, 2009 10:02 AM	HC_Receipts_Goals_by_Sour	cmmcnut	No Parameters	Crystal Reports	Success
Jul 17, 2009 11:16 AM	HC_Receipts_Goals_by_Sour	cmmcnut	No Parameters	Crystal Reports	Success

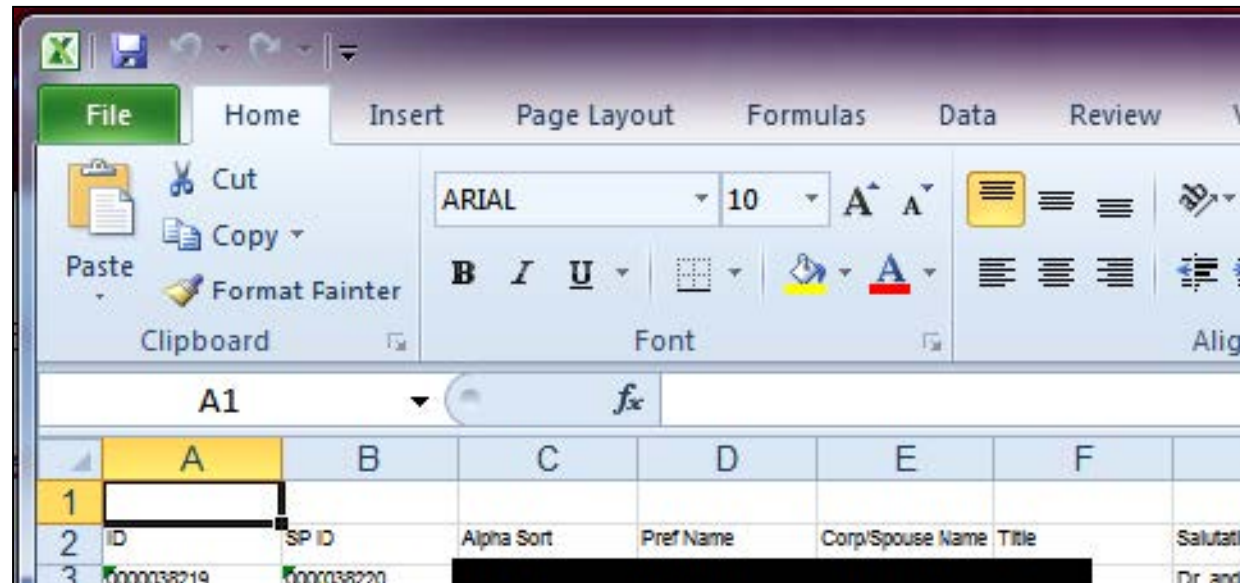
Download and Open the File

You will be asked if you would like to open or save the file. Select “Open.” Remember, if you need to save the report, do not save it to your hard drive. For security reasons, save it to Gizmo, or just leave it on CRS since it will retain up to 50 instances.



Viewing the Report in Excel

After the report opens in Excel, it is ready for review.



Preferences – Changing Password

Click on the “Preferences” icon to set viewing preferences or to change your password.



The screenshot displays the SAP BusinessObjects InfoView application window. The title bar reads "SAP BUSINESSOBJECTS INFOVIEW" and the SAP BusinessObjects logo is in the top right corner. The main menu bar includes "Home", "Document List", "Open", "Send To", "Help", "Preferences", "About", and "Log Out". The "Preferences" menu item is highlighted with a blue arrow pointing from the text above. Below the menu bar is a toolbar with icons for "New", "Add", "Organize", "Actions", and a search box. The main content area shows a list of documents with columns for "Title", "Last Run", and "Type".

Title	Last Run	Type
Speech and Hearing Clinic Folder Speech and Hearing Clinic weekly, monthly, and adho		Folder
COEHP Weekly_Gift_Report.rpt	Jun 8, 2013 1:56 PM	Crystal Report
UA - Scholarship Recipient Disbursement	Jan 14, 2013 11:33 AM	Crystal Report

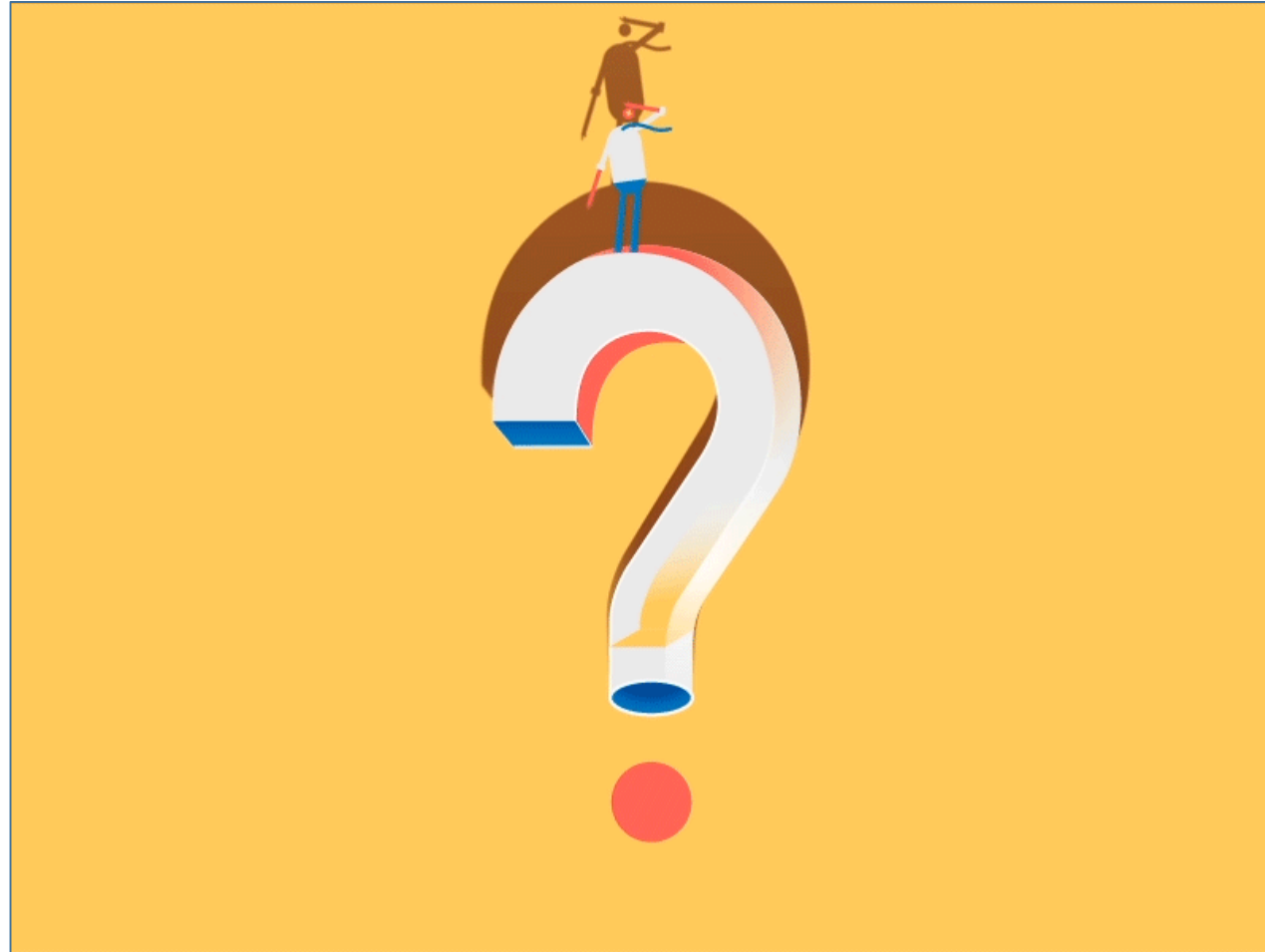
Preferences – Change Password

- Scroll down to the “Change Password” area on the Preferences page
- Enter the password you used to login in the “Old Password” field
- Enter a new password of your choice, confirm it, and then click “OK”



The screenshot shows a dialog box titled "Change Password" with a dropdown arrow to its left. The dialog contains four text input fields: "User Name:" with the text "Administrator" entered, "Old Password:", "New Password:", and "Confirm New Password:". At the bottom right of the dialog are two buttons labeled "OK" and "Cancel". Below the dialog box, the word "Discussions" is visible in a blue bar.

Questions?



Blackbaud General Ledger Solution (Familiarization)

What is the General Ledger Solution?

The Blackbaud General Ledger Solution gives you an online portal that allows you to view the financial state of your Allocations (or Projects).



Project Definition Report

Detailed listing of project attributes, organizational hierarchy, current balance and related notes
As of: 3/8/2018

P1

Project - 30000001 - [REDACTED] Scholarship

Project Definition	
Status	Active
Project Type	Foundation
Date Established	12/29/1998
Net Asset Class	Permanent
Endowment Type	Permanent Endowment
Earnings Distribution	31000001
Designation	
Use Code	UG Scholarship - B
Constituent Area	Multicultural Student Affairs - GS
Program Type	Not Applicable
University Reference	NA
X-Ref Number	029052000
Income Restrictions	Not Applicable

Balance as of:			
	7/1/2017	3/8/2018	
Cash	\$0.00	\$0.00	
Pledges Receivable	\$0.00	\$0.00	
Other Assets	\$0.00	\$0.00	
Pooled Assets	\$27,725.99	\$29,859.66	
Accounts Payable	\$0.00	\$0.00	
Net Assets	\$27,725.99	\$29,859.66	

Hierarchy	
Campus	02-Fayetteville
College	Vice Chancellor Student Affairs-2322
Department	Vice Chancellor Student Affairs-2322
Sub Department	Not Applicable

Project Notes

Project Financial Summary Report

Project financial position and statement of activity with a transaction drilldown
As of: 3/8/2018

P4

Project	Project Description	Campus	Endowment Type	
30000001	[REDACTED]	02-Fayetteville	Permanent Endowment	
		Month Ended 3/8/2018	Current YTD 3/8/2018	Last Fiscal YTD 3/8/2017
Financial Position				
Cash			\$0.00	\$0.00
Pledge Receivable			\$0.00	\$0.00
Other Assets			\$0.00	\$0.00
Pooled Assets			\$29,859.66	\$26,639.27
Accounts Payable			\$0.00	\$0.00
Ending Net Assets			\$29,859.66	\$26,639.27
Statement of Activities				
Gift Revenue		\$0.00	\$0.00	\$0.00
Pledge Revenue		\$0.00	\$0.00	\$0.00
Total Contributions		\$0.00	\$0.00	\$0.00
Gain (Loss)		\$0.00	\$2,133.67	\$1,389.66
Interest		\$0.00	\$0.00	\$0.00
Total Investment Income		\$0.00	\$2,133.67	\$1,389.66
Total Other Income		\$0.00	\$0.00	\$0.00
Total Revenue		\$0.00	\$2,133.67	\$1,389.66
Total Expense		\$0.00	\$0.00	\$0.00
Change in Net Assets		\$0.00	\$2,133.67	\$1,389.66
Beginning Net Assets		\$29,859.66	\$27,725.99	\$25,249.61
Ending Net Assets		\$29,859.66	\$29,859.66	\$26,639.27

Project Transaction Detail Report

Listing of all transactions and balances within a specified date range for a single project
For the period: 7/1/2017 - 3/8/2018

P2

Project 30000001 - [REDACTED]
Endowment Type - Permanent Endowment
Net Asset Class - Permanent
Campus - 02-Fayetteville

Balance as of:			
	7/1/2017	3/8/2018	
Cash	\$0.00	\$0.00	
Pledge Receivable	\$0.00	\$0.00	
Other Assets	\$0.00	\$0.00	
Pooled Assets	\$27,725.99	\$29,859.66	
Accounts Payable	\$0.00	\$0.00	
Net Assets	\$27,725.99	\$29,859.66	

Transaction Number	Post Date	Account Number	Account Description	Amount	Debit / Credit	Journal	Journal Reference
20008-0001	1/31/2018	02-10000	Cash	\$252.05	Debit	ID	Invest/Divest - -0.0650 Purchased @ 3874.9365 Per Share
20008-0002	1/31/2018	02-16200	Total Return Pool	(\$252.05)	Credit	ID	Invest/Divest - -0.0650 Purchased @ 3874.9365 Per Share
20010-0041	1/31/2018	02-16200	Total Return Pool	\$931.89	Debit	MV	Market Value Update - As of 1/31/2018
20010-0042	1/31/2018	02-46000	Gain(Loss)	\$931.89	Credit	MV	Market Value Update - As of 1/31/2018
19918-00077	1/1/2018	02-10000	Cash	(\$214.31)	Credit	CG	Cap Gain Dist for Q/E 12/31/2017
19920-00043	1/1/2018	02-10000	Cash	(\$6.29)	Credit	FO	Fnd O/H Q/E 2017-12-31
19920-00045	1/1/2018	02-10000	Cash	(\$31.45)	Credit	DO	Dev O/H Q/E 2017-12-31

The P Files

Almost everything you need to know about a single Allocation!

Financial Position Report

Consolidated presentation of project financial position filtered by project attribute.

As of: 2/28/2018

Project ID	Project Description	Cash	Pledges Receivable	Other Assets	Pooled Assets	Accounts Payable	Net Assets
30000027	Chair in	\$0.00	\$0.00	\$0.00	\$1,989,991.94	\$0.00	\$1,989,991.94
31000027	Chair in	\$310,409.82	\$0.00	\$0.00	\$0.00	\$0.00	\$310,409.82
30000028		\$0.00	\$0.00	\$0.00	\$33,257.84	\$0.00	\$33,257.84
31000028		\$23,559.88	\$0.00	\$0.00	\$0.00	\$0.00	\$23,559.88
30000031	son E. Fay	\$0.00	\$0.00	\$0.00	\$1,553,144.72	\$0.00	\$1,553,144.72
31000031	son E. Fay	\$126,615.44	\$0.00	\$0.00	\$0.00	\$0.00	\$126,615.44
30000032	Year	\$0.00	\$0.00	\$0.00	\$18,658.39	\$0.00	\$18,658.39
31000032	Year	\$1,717.53	\$0.00	\$0.00	\$0.00	\$0.00	\$1,717.53
30000033	dowed	\$0.00	\$0.00	\$0.00	\$72,046.92	\$0.00	\$72,046.92
31000033	dowed	\$3,719.22	\$0.00	\$0.00	\$0.00	\$0.00	\$3,719.22
40000052	n	\$0.00	\$0.00	\$442,600.59	\$0.00	\$341,694.55	\$100,906.04

C1

Consolidated Project Management Reports

- [C1 - Financial Position Report](#) PDF/Excel CSV - Extended
- [C2 - Statement of Activities Report](#) PDF/Excel CSV - Extended
- [C3 - Match Grant Report](#)

Multiple Formats Available!



Statement of Activities Report

Consolidated presentation of project activities filtered by project attribute.

For the period: 7/1/2017 - 3/9/2018

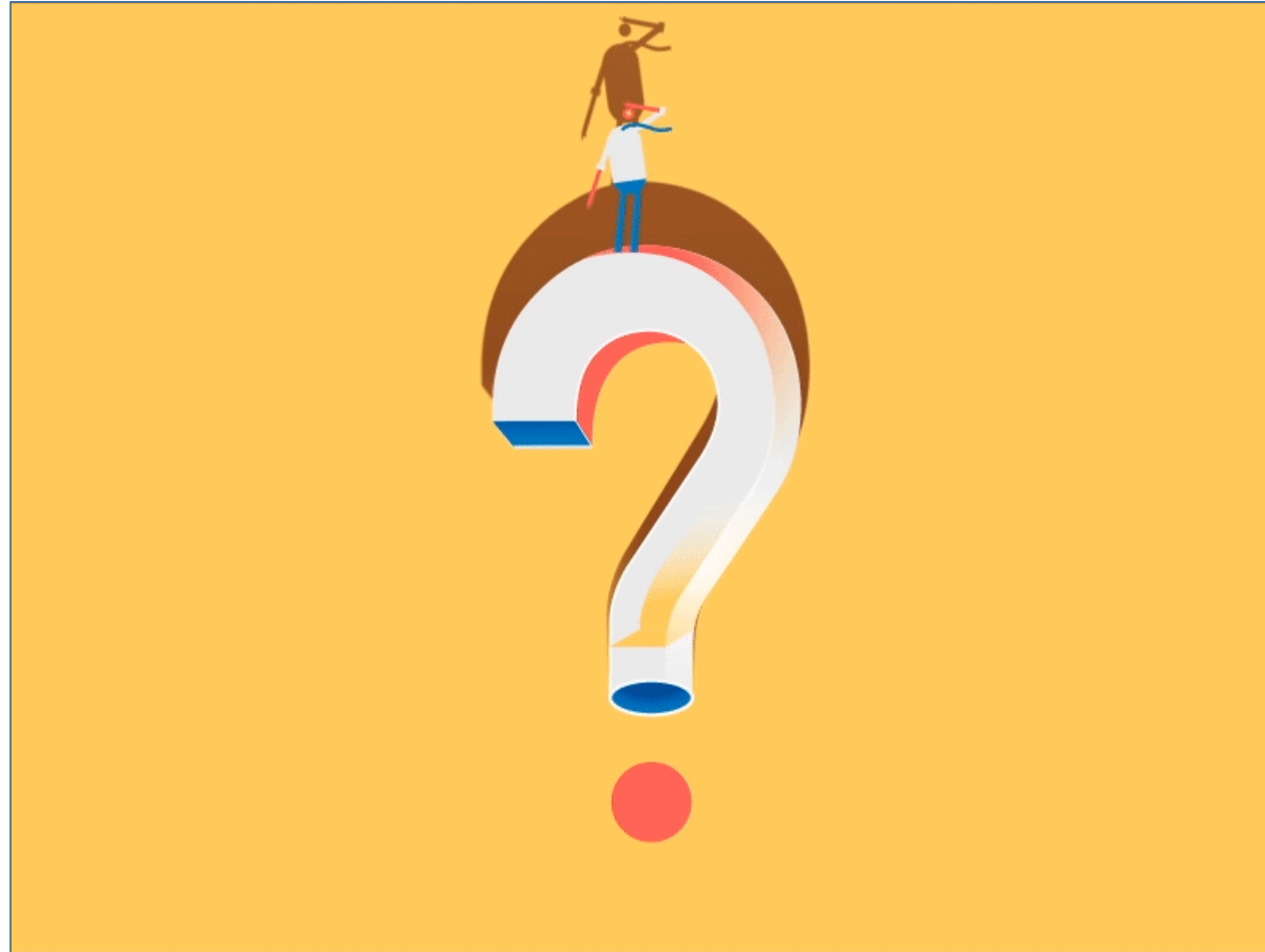
Project ID	Project Description	Beginning Balance	Income					Expenses	Ending Balance
			Gifts	Pledges	Gain/Loss	Interest	Other Income		
30000027	Chair in	\$1,847,800.67	\$0.00	\$0.00	\$142,191.27	\$0.00	\$0.00	\$0.00	\$1,989,991.94
31000027	Chair in	\$254,379.76	\$0.00	\$0.00	\$44,650.22	\$11,379.84	\$0.00	\$0.00	\$310,409.82
30000028		\$30,881.77	\$0.00	\$0.00	\$2,376.07	\$0.00	\$0.00	\$0.00	\$33,257.84
31000028		\$22,553.13	\$0.00	\$0.00	\$746.23	\$260.52	\$0.00	\$0.00	\$23,559.88
30000031	son E.	\$1,442,167.84	\$0.00	\$0.00	\$0,976.88	\$0.00	\$0.00	\$0.00	\$1,553,144.72
31000031	son E.	\$83,295.71	\$0.00	\$0.00	\$34,848.51	\$8,471.22	\$0.00	\$0.00	\$126,615.44
30000032	Year	\$17,325.13	\$0.00	\$0.00	\$1,333.26	\$0.00	\$0.00	\$0.00	\$18,658.39
31000032	Year	\$1,196.75	\$0.00	\$0.00	\$418.65	\$102.13	\$0.00	\$0.00	\$1,717.53
30000033		\$65,544.31	\$1,400.00	\$0.00	\$5,102.61	\$0.00	\$0.00	\$0.00	\$72,046.92
31000033		\$3,250.73	\$0.00	\$0.00	\$1,587.28	\$381.21	\$0.00	\$1,500.00	\$3,719.22
40000052	son	\$78,921.05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$21,984.99)	\$100,906.04
50000176	bert Gift	\$76,940.21	\$0.00	\$0.00	\$11,878.92	\$1,840.69	\$0.00	\$1,628.49	\$89,031.33

C2

The C Files

Almost everything you need to know about a group of Allocations!

Questions?



Need More Training?

Joshua Tipton



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