

UC SANTA BARBARA

Advance Web CRM Navigation Guide

September, 2022

UCSB Advancement Services

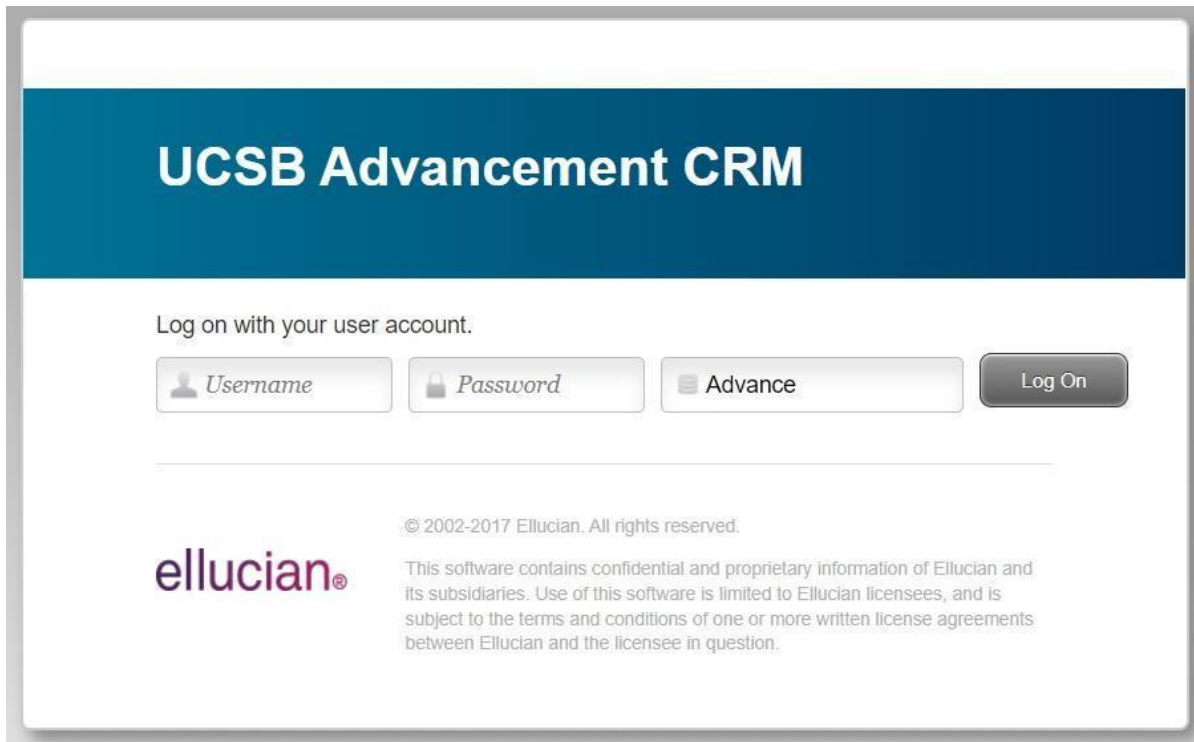
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To log onto Advance Web CRM:

Start your Web browser and navigate to your logon page. Chrome is the preferred browser.

Once you have reached the logon page, you will see two fields for entry of username and password.



The screenshot shows the login interface for UCSB Advancement CRM. At the top, a dark blue header contains the text "UCSB Advancement CRM" in white. Below the header, the text "Log on with your user account." is displayed. There are three input fields: "Username" with a person icon, "Password" with a lock icon, and "Advance" with a menu icon. To the right of these fields is a dark grey "Log On" button. At the bottom left is the "ellucian" logo. At the bottom right, there is a copyright notice: "© 2002-2017 Ellucian. All rights reserved." and a paragraph of legal disclaimer text.

Enter your username, hit the tab key to enter your password, and then click the Log On button or use the Enter/return key.

Next, you will see a **Confidentiality Notice**. If you agree to the terms, click OK or use the Enter/return key.

UCSB Institutional Advancement Confidentiality Notice

As an employee of the Division of Institutional Advancement you are provided with access to sensitive or confidential information through use of the Advancement Web CRM system and other resources. You hold a position of responsibility and trust that carries the understanding that confidential information viewed within this system must be held in strict confidence. IA's confidential information is not open to the external campus community and precautions are necessary by you to protect this data from unauthorized disclosure or use.

This responsibility will be executed in accordance with the Federal Family Educational Rights and Privacy Act (FERPA) of 1974, the California Information Practices Act, California Public Records Act and other applicable laws, also including the policies and procedures of the University of California, UC Santa Barbara and the Division of Institutional Advancement.

In keeping with Federal and State Law, the following information is available only to UCSB Institutional Advancement Staff when required for the performance of their job duties. This information or reports may not be released to any other individual or organization outside the Division of Institutional Advancement.

By clicking 'OK' you agree to this statement of confidentiality.

Home Page

After you have agreed to the Confidentiality Notice, the **Home page** will display in your browser. The Home page is the dashboard for accessing the key areas of the system that are job-critical or that are referenced frequently. The goal of the Home page is to allow you to be one click away from information.


The screenshot shows the UCSB Advance Web CRM Home Page. At the top, a blue callout box states: "The Main Menu and Navigation Controls will appear at the top of every page while you are using Advance Web CRM." The browser address bar shows "advancecrm.ia.ucsb.edu/A". Below the browser, a navigation bar contains icons for home, back, forward, search, and other functions. The main content area features a "Home" tab on the left, a "Home" header, and a "Actions" button. A welcome message reads: "You are logged on as [User] on the ADVWPRD database. Welcome to Advance. Today is Monday, August 29, 2022." Below this are three main sections: "Entity Lookup" with a person icon, "Reports" with a bar chart icon, and "OARS" with a yellow icon. A second blue callout box on the left explains: "The page tree is the main navigation tool within an entity record. It is located on the left hand side of the screen, under the tab." A third blue callout box on the right explains: "The application frame encompasses the area directly to the right of the page tree and below the Main Menu. At the top of the frame is the application header and within it is all information related to the frame in forms and form headers."


Main Menu and Navigation Controls


The **Main Menu** gives you quick access to several application functions. It allows you to return to the Home page from whatever application is open and log off the system when your work is complete. The Main Menu consists of a series of icons with links, each activated by a single mouse click.





Main Menu items, from left to right:


 **Home:** Clicking "Home" will navigate you to the Home page. The page from which you navigated will still be open and available for redisplay by selecting the tab above the application header.

 **Go To:** Clicking "Go To" displays the Go To application, which allows you to quickly navigate to a specific application. Using Go To is an alternate navigation method to the page tree and also provides access to additional applications.

 **Lookups:** Clicking "Lookups" from the currently displayed application will navigate you to Lookups. Lookups allow you to find data in the database.

 **Last Viewed:** Clicking "Last Viewed" will generate a popup window listing the last ten records that you have viewed. To expand the list of last viewed, click the "More" button and additional records will be listed. You can navigate to any of the records listed by clicking on the name in blue text. You can also view the last lookups you conducted and last reports viewed and navigate to those items by clicking on the name.

 **Reports:** Clicking "Reports" will take you directly to a list of AWA reports to which you have access.

 **Clipboard:** Clicking "Clipboard" navigates you to the Clipboard. Here, you can work with a new Clipboard list or open or modify existing Clipboard lists.



Help: Clicking “Help” from the currently displayed application will open a new browser and display Advance Online Help. From here you can navigate to any help topic.



Close All: Clicking “Close All” closes the tabs for all open applications.

Navigation controls



Navigation controls modify what is open in the application. Using navigation controls, you can recall information previously displayed (similar to the back and forward arrows in your browser, but these are within Advance CRM). It is recommended that you do not use your browser navigation arrows to move next or previous while working in Advance Web CRM, but rather, use these navigation arrows within the system. You may also refresh the current page by clicking on the refresh circle.

Page Tree

The page tree is the primary navigation tool in Advance and is located on the leftmost vertical space of the page. However, it is important to keep in mind that the page tree is not the only navigation tool, as the Main Menu provides additional navigation. **Use the page tree to change your password.**

The page tree has three general areas:

Page Name - The first few rows plus a half-width row are reserved for the page name as well as any actions you may take. For example, the Actions list allows you to access the Clipboard or switch to a new entity ID (depending on the current page).

Page Tree - The page tree lists the applications associated with the displayed page. Each listed application in the page tree expands by clicking and can be collapsed again by clicking . Expanding the page tree displays the links, or branches, available

beneath the major headings. When you click a branch (sub-heading), you navigate to that topic (more on this later).

Copyright Notification - Standard SunGard Higher Education copyright notification always appears at the foot of the page tree. This section of the page tree also contains links to privacy information, so this information is accessible from any page within Advance.

The screenshot shows a web browser window with the URL `advancecrm.ia.ucsb.edu/Advance2017/default.aspx`. The page title is "UCSANTA BARBARA" and the user is logged in as "Suzie Follmer [Logoff]". The main content area displays the "Entity Overview" for "Mrs. Mary G. Gaucho #526883 (No Contact Requested)". The overview includes fields for "Rec Type" (Friend), "Degree" (BA 1999 College of Letters & Science (Major: Communication Studies)), and "Prim Affil" (Widowed:). Below this, there is a "Contact Information" section with two columns: "Home (Preferred)" and "Business". The "Home" contact is at 123 Main St, Holyoke, MA 01040-5812, modified 08/25/2022. The "Business" contact is at 2010 Cliff Drive, Santa Barbara, CA 93109-1506, modified 07/10/2019. A "Preferred Email" is listed as `marygaucho@email.com`. On the left side, there is a "page tree" box with a blue arrow pointing to a navigation menu. The menu items include: Overview, Detail, Biographic, Giving, Stewardship, Membership, Prospect Tracking, Alerts, Messages, Add Person, Add Organization, Entity Update, Ack Helper, Deceased Entity, and Entity Merge.


Applications and Application Headers

Applications are comprised of one or more forms within the application frame of a Web page. Applications are located within a page and provide the interactive 'holding place' for additional elements, such as forms. Applications are dynamic and are the means by which data are collected and displayed. The Home page, for example, displays summaries of information pertinent to your logon and allows you to navigate to and view information specific to your function as a user of Advance. They are contained within the Home application. The contents of the application frame will change as you navigate to different details about the entities you view. If there is more information to display within the application frame than the space allowed within your browser's window size, a scroll bar displays on the right side.

The application frame (or application) encompasses the area directly to the right of the page tree and below the Main Menu. At the top is the application header and within it is all information related to the frame in forms. The **application header** contains the title of the application along with any controls associated with the application. The application header control for the Home page is **Actions** and the action available is **VCR**.



The header displays its title and all of the controls associated with using the application on each page. The right hand side of the application header contains a drop down **Actions menu**. The number of actions displayed on an application header's Actions list depends on the header being displayed, so the items shown in the figure may not appear on every Action menu. Your potential choices are:

- | | |
|--------------------|---|
| Expert Mode | This Action displays when you are on Lookups. By switching to Expert Mode, additional controls for setting lookup criteria are provided. |
| VCR | Selecting 'VCR' from the Action List displays the VCR command buttons () on the upper right of the page. If you have copied items to your clipboard which is compatible with the form being displayed, you can display the information for the current form for each item by clicking |

	the Forward or Back button. You may also move to the beginning or end of the list by clicking the First or Last button.
To Spouse	Selecting 'To Spouse' from the Actions list displays the same application as currently being displayed for an entity, but with information for the entity's spouse. If the entity does not have a spouse with a record, an information dialog box will display indicating the information is not available.
Reports	Selecting 'Reports' from the Actions list displays the Report List application. Default reports displayed here are Entity Profile Report and Labels.
Copy	Selecting 'Copy' from the Actions List will copy the item from the currently displayed application to the appropriate clipboard list on the clipboard. For example, if Contact Report application is currently being displayed and Copy is selected, the Report ID is copied to the Contact Report clipboard list.
Copy/Replace	Selecting 'Copy/Replace' from the Actions List will copy the item from the currently displayed application and replace any existing items on the appropriate clipboard list on the clipboard.
Enter New ID	Selecting 'Enter New ID' from the Actions list displays the 'ID Number' prompt. By entering a new ID, you display the information for the new entity on the same application currently being displayed. For example, if Affiliations are currently displayed for 'entity X' and you select 'Enter New ID' from the Actions list, and enter the Entity ID for 'entity Y', the Affiliations for 'entity Y' will replace those previously being displayed.

Forms and Form Headers

A **form** is comprised of fields, which allow you to input values or select values during a lookup. A reference to a form in Advance is synonymous to a DataWindow in Advance Windows.

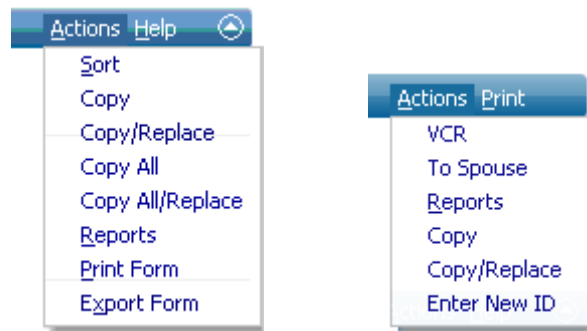
An example of a form is the Giving Summary form on the Entity Profile. Upon accessing the Entity Profile, you will see many forms, including the Primary Address, Affiliations and Giving Summary forms.

Form headers display at the top of a form and contain the title of the form, along with any controls associated with the form. Form header controls for forms on the Home page vary, depending on the current form. Examples of what controls are available are New, Actions and Help. In addition, information displayed beneath form headers can be minimized (or collapsed) by clicking and maximized (or expanded) again by clicking the triangles on the far right. When you click the triangle to face up, you temporarily hide the information so more information can be viewed within the application frame without using the scrollbar.

On a form header, your menu selection choices are Save, New, Delete, Actions and Help (depending on your security rights).



Form header Actions only display choices applicable to the form on which they appear. The options displayed are dependent on your rights.

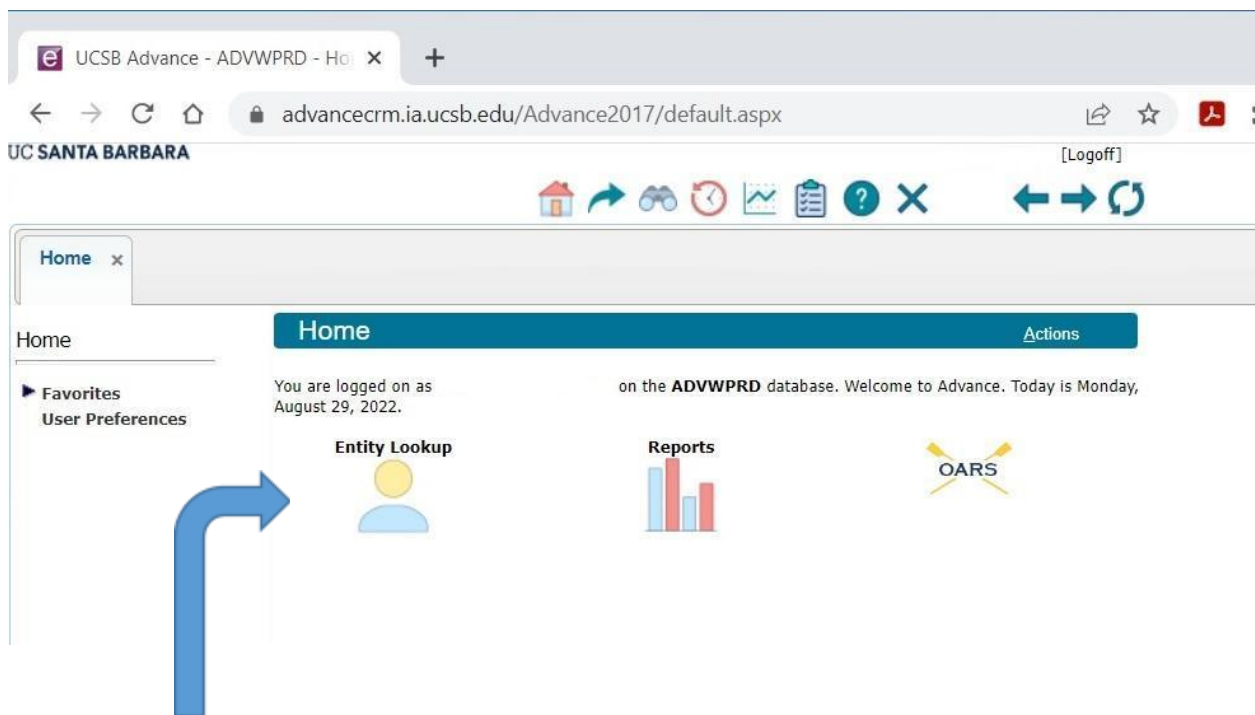


The number of Actions displayed in the figures above may not appear on every menu:

- Copy** Selecting this copies (append) an ID from the currently selected form to the appropriate clipboard.
- Copy/Replace** Selecting this copies the ID from the currently selected form and replace all current entries on the appropriate clipboard with it.
- Copy All** Selecting this copies (appends) all IDs on the current form to their appropriate clipboard(s).
- Copy All/Replace** Selecting this copies all IDs on the current form and replaces all current entries on the appropriate clipboard(s) with them.

Reports	Selecting this navigates you to the Report List application and Form. Reports will run on IDs located at the form level, if any.
Print Form	Selecting this prints the contents of the current form. A new browser window opens and the standard Windows printing procedure applies.
Export Form	Selecting this provides you with the ability to save the currently displayed information as a CSV file (Comma Separated Value) for use in another application.
Paste	Selecting this pastes the current clipboard value into the current form.

Looking up Records



To search for an entity, select **Entity Lookup** on the Home page. After you click on Entity Lookup, a new application page will appear on your screen. You will see a new header entitled Lookups, and you will see a new **Lookups** heading on the Page tree.

UCSB Advance - ADVWPRD - Loc x +

advancecrm.ia.ucsb.edu/Advance2017/default.aspx

UC SANTA BARBARA [Logoff]

Home x Lookups - Bio - Entity x

Lookups Actions

1. Choose a template (optional) Bio - Entity
2. Select results format* Entity Lookup List
3. Select output type* Display results/Open on exact match
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Search

Help

Help

The Lookups page defaults to the Bio-Entity template. You may choose another template (1) by selecting from the drop down menu.

The results format defaults to an Entity Lookup List (2). You can select other results options from the drop down menu.

You may also select Output Type, which defaults to Display Results/Open on Exact match (3) or you can choose another output option from the drop down menu.

You may also select additional criteria from the page tree on the left of the screen, if you already have Saved Criteria.

Option (5) allows you to choose specific criteria from available fields that are listed on the page.

Deleted = N Not Deleted

Address Lookup Help

Preferred =

The Biographic template choices are:

- Activity Participant** Use this template when you wish to search for entities with involvement in an activity or an event. This Attribute should not be confused with Student Activities. Search forms displayed are Activity Participant, Address and Geo Code.
- Affiliation** Use this template when you wish to search for entities with affiliations, both inside and outside the institution. Search forms displayed are Affiliations, Address and Geo Code.
- Committee Header** Use this template when you wish to search for committees and their associated information. Search forms displayed are Committee, Committee Role and Committee Owner.
- Committee Participant** Use this template when you wish to search for entities who have participated on various institutional committees. Search forms displayed are Committee Participant, Address and Geo Code.
- Entity (default)** Use this template when you wish to search for entities. Search forms displayed are ID, Entity, Address and Geo Code.
- Mailing List** Use this template to search for entities whose records are associated with mailing lists
- Name/Address** Use this template to search for entities by Name or Address.
- Student Activity** Use this template when you wish to search for entities who have been involved with a student activity. Search forms displayed are Student Activity, Address and Geo Code.

When you select a Biographic Template for your Lookup, the appropriate results format displays. This value identifies the recommended format for the results of your lookup and may be changed by making a selection from the drop-down list. For example, changing the results format selection to Activity Participation Lookup List will cause the system to display the results of the query in the Activity Participation Lookup List format on the Lookup Results page.

When selecting your Biographic results format, it is important to select a format that has a relationship with Biographic attributes. If a Biographic relationship is not provided, the system will display an error indicating the nature of the mismatch. The following results formats are associated with Biographic attributes:

Activity Participants Lookup List	When selecting the Activity Participants Lookup List result, at least one of your search criteria must be Biographic.
Affiliation Lookup List	When selecting the Affiliation Lookup List result, at least one of your search criteria must be Biographic.
Committee Lookup List	When selecting the Committee Header Lookup List result, at least one of your search criteria must be Biographic.
Committee Participation Lookup List	When selecting the Committee Participants Lookup List result, at least one of your search criteria must be Biographic.
Entity Lookup List (default)	When selecting the Entity Lookup List result, at least one of your search criteria must be Biographic.
Student Activity Lookup List	When selecting the Student Activity Lookup List result, at least one of your search criteria must be Biographic.

If you select additional attributes from the Lookups Page Tree, no template will appear because your choice will be considered a variation from one of the pre-defined templates.

To perform the lookup, enter your criteria and click Search.

If you have an Advance ID, enter it in the ID field, then click the Search button or use the enter/return key. If there is a corresponding record match, the record's Entity Overview page will open.

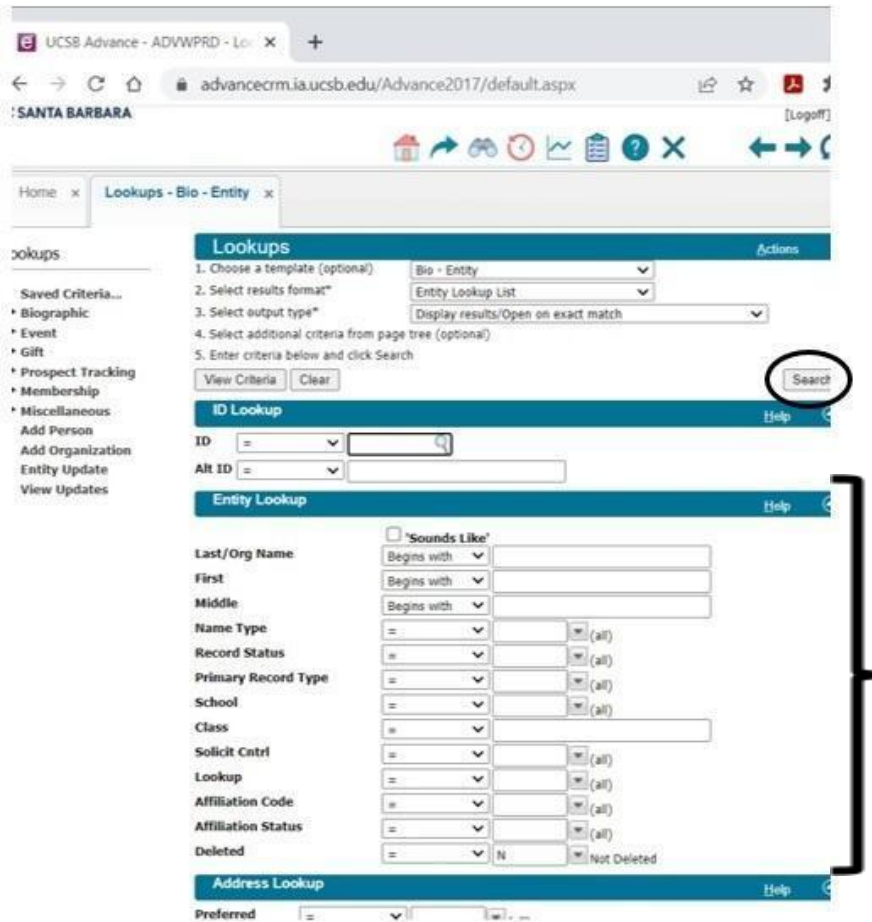
If you have an alternate ID (i.e., perm number), enter it in the Alt ID field, then click the Search button or use the enter/return key. Records containing the alternate ID will open on a new tab called Lookup Results. **Note: If you have an ID number or alternate ID number, you do not have to enter any additional information on this page.**

The screenshot shows the UCSS Advance CRM interface. The browser address bar displays 'advancecrm.ia.ucsb.edu/Advance2017/default.aspx'. The page title is 'SANTA BARBARA'. The main content area is titled 'Lookups' and contains the following sections:

- Lookups:**
 - 1. Choose a template (optional): Bio - Entity
 - 2. Select results format*: Entity Lookup List
 - 3. Select output type*: Display results/Open on exact match
 - 4. Select additional criteria from page tree (optional)
 - 5. Enter criteria below and click Search
- ID Lookup:**
 - ID: [Empty field]
 - Alt ID: [Empty field]
- Entity Lookup:**
 - Sounds Like
 - Last/Org Name: Begins with [Empty field]
 - First: Begins with [Empty field]
 - Middle: Begins with [Empty field]
 - Name Type: [=] [Empty field] (all)
 - Record Status: [=] [Empty field] (all)
 - Primary Record Type: [=] [Empty field] (all)
 - School: [=] [Empty field] (all)
 - Class: [=] [Empty field]
 - Solicit Cntrl: [=] [Empty field] (all)
 - Lookup: [=] [Empty field] (all)
 - Affiliation Code: [=] [Empty field] (all)
 - Affiliation Status: [=] [Empty field] (all)
 - Deleted: [=] N [Empty field] Not Deleted
- Address Lookup:**
 - Preferred: [=] [Empty field]

Enter Advance ID, if known, in the **ID** field. Or, enter an alternate ID, if known, in the **Alt ID** field. Then click the **Search** button or use the enter/return key. Result(s) will display in a new page.

If you do not have an ID number, use the area under the Entity Lookup header bar to enter your search criteria.



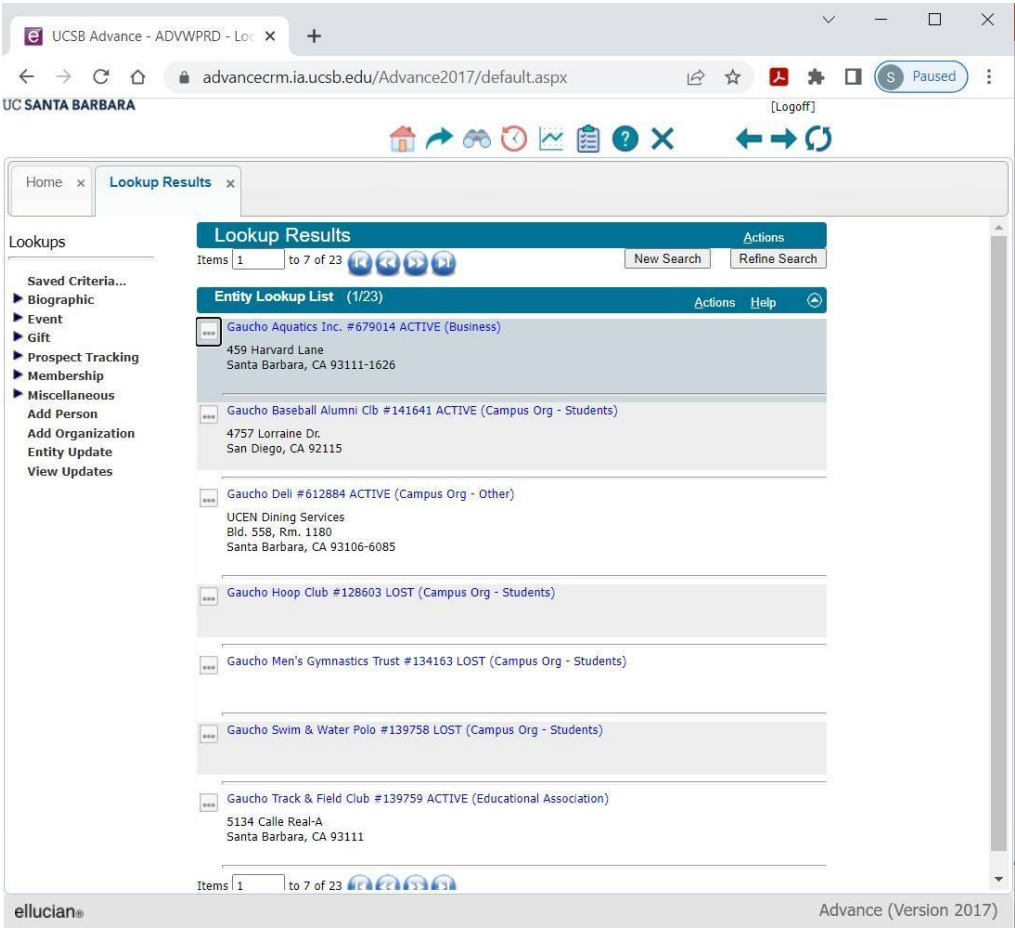
Use the area under the **Entity Lookup header bar** to search criteria: Last name, first name, name type, record status, etc. Then click the **Search** button or use the enter/return key and a new **Lookup Results** page will open displaying the search results. If the results are too many to display, you will have options to **refine your search** or select another means to display the results. You may also search by select criteria under the **Address Lookup** header bar.

The lookup fields contain default settings as displayed above. You can specify the conditions the criteria must meet by selecting a condition from the drop-down list:

Condition	Description
=	Must be an exact match to the characters entered
Not Equal	Not equal to the characters entered
>	Greater than the characters entered
<	Less than the characters entered
>=	Greater than or equal to the characters entered
<=	Less than or equal to the characters entered

Begins with	Begins with the characters entered
Like	Is similar to the characters entered
Ends with	Ends with the characters entered
Contains	Contains the characters entered

Lookup Results



If there is a single match to your lookup, Advance will open it in the corresponding application. If there is more than one result, a **Lookup Results** list will display. You can navigate the results using the scroll bar on the right side of the form, or you can move

back-and-forth between multiple pages of results by using the VCR buttons displayed on the top of the application. When you determine you wish to see more information about one of the rows in your list, click the ellipsis button or click on a hyperlink to navigate to the detail.

If you wish to save the results of your lookup, you can save the list to the **Clipboard**. If you wish to refine your search, click **Refine Search**, or, if you wish to perform a new search, click **New Search**. If you click Refine Search, you will be able to view criteria from your most recent search

Entity Overview Page

Selecting the entity from a lookup result or entering an ID will open a new Entity Overview page over the Entity Lookup page. Once the entity record is open, you will see that the Page tree has a new title, **Entity**, and a list of form headers is now visible for navigation purposes. The headers are **Biographic, Giving, Membership, and Prospect Tracking**.

On the Entity Overview page, you can view the stored biographic information for the entity. The Profile header provides basic entity information. For more detailed information on any of the entity's attributes, expand the Biographic Page Tree by clicking on the 'expand' arrow (▶) to the left of 'Biographic'. When the tree is expanded (▼), attributes such as Employment, Relationships, Sports, etc. will display.

To access the Entity Overview:

1. Select Lookups on the Main Menu. Entity Lookup will display.
2. Enter information in the ID, entity, address, or affiliation and click Search.
3. Advance will display a list of all records that match your criteria, from which you may select the appropriate entity.
4. Click the appropriate hyperlink from the list results to open the entity's record.

The screenshot shows the UCSB Advance system interface. The browser address bar displays 'advancecrm.ia.ucsb.edu/Advance2017/default.aspx'. The page title is 'UC SANTA BARBARA'. The main content area is titled 'Entity Overview' for 'Mrs. Mary G. Gauchó #526883 (No Contact Requested)'. The record type is 'Friend', the degree is 'BA 1999 College of Letters & Science (Major: Communication Studies)', and the primary affiliation is 'Married: Joseph Gauchó #526881'. The 'Contact Information' section shows home and business addresses. The 'Active eContact Information' section shows a preferred email address. The 'Affiliations' section is currently empty. The 'Giving Summary' section shows a table for 'Gift Club' with columns for Credit, Gifts, Matching, Pledges, and Balance. The 'Membership Summary' section is also currently empty.

Viewing the Entity Overview

The first application you will typically see for an entity is the Entity Overview. From here, you can navigate to all of the other attributes for the selected entity using the page tree on the left side of the page.

This close-up shows the header of the Entity Overview for 'Ms. Dorothy D Parker #19299 (Deceased)'. The record type is 'Alumnus Alumna (1932 Art and Science)', the degree is 'BA 1932', and the primary affiliation is 'Widowed: Mr. Howard Martin Parker #19300'. The record status '(Deceased)' is highlighted with a red box.

Under the Entity Overview Application Header, you will see:

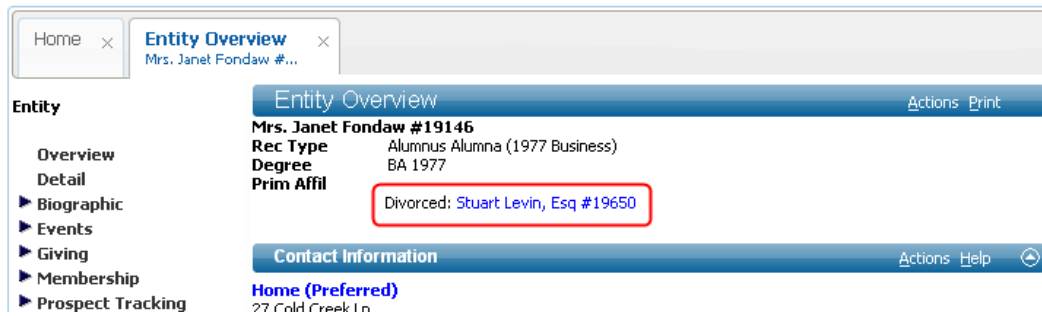
The entity's Primary Name, Advance ID#, and Alternate Record Status if not Active.

Entities with any record status other than 'Active' will have their record status displayed to the right of their name on the Entity Overview.

You will see the Rec (Record) Type(s) on the next line, with degree info if applicable. The next line will display degree type and year, if applicable. If there is a primary Affiliation, it will be listed on the next line. Spouse information will then be listed, with marital status and an active blue link if a spouse record exists.

Entities with a former spouse can view former spouse information along with a hyperlink to the former spouse's record, on the Entity Overview. Former spouse information appears when all of the following conditions are met:

- The entity is not married.
- The entity has a record in the former spouse table.
- The record in the former spouse table has a marital status, whose 'Display on Profile' is enabled.



Views

Views are used to display information in a Primary/Detail format on many pages. When you select Views from the page tree, the Views form displays a Primary form with the types of details available for the entity's biographic data. When you select a row on the Views form, the detail for that row displays below the Primary form.


The available forms include:

- Employment & Organization Contacts (person entity)
- Relationships (person entity)
- Relationships – Combined (Person entity w/spouse)
- Org Relationships (org entity)
- Relationships – Combined (org entity w/subsidiaries)

Views			Actions	Help
Context	Name	Description		
Entity	Employment & Org Contacts	Associations with organizations		
Entity	Relationships	Consolidated relationship info		
w/Spouse	Relationships - Combined	Consolidated relationship info w/Sp		

Fields include:

Context	This identifies whether the data is for the entity only or combined with spouse information.
Name	Identifies the form header and type of information in the row.
Description	A brief description of the information displayed in the Detail form when the row is selected.

To view more data for a Detail form row, either click the row or click  if it displays to the left of the row.

UCSB Advance - ADVWPRD - Ent x +

advancecrm.ia.ucsb.edu/Advance2017/default.aspx [Logoff]

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Entity Overview Mrs. Mary G. Gaucho...

Entity Overview Actions Print

Mrs. Mary G. Gaucho #526883 (No Contact Requested)

Rec Type Friend
Degree BA 1999 College of Letters & Science (Major: Communication Studies)
Prim Affil

Overview
Detail
Biographic
Views
Activities 2
Addresses 31
Adm Vol Act
Affiliations
Awards/Honors
Bank Cards
Bio Detail 1
Children
Comments
Comm Particip
Cvr Accounts
Cvrd by Accounts
Degrees 1
eContact
Email 1
Employment 7
Fmr Spouses 5
IDs 1
Inst Suffixes
Interests
Interviewee
Mail Control 1
Mailing Lists 2
Marital Info 1
Mentor
Names 2
Publications
Race/Ethnicity
Record Types 1

Contact Info
Home (Preferred)
123 Main St
Holyoke, MA 010
Modified: 08/25/

Preferred Email
marygaucho@em

Active eCor

Affiliations

Giving Sum

Gift Club:
Credit
Annual
Other
Total
Last Transaction:

Membershi

Using the page tree

Clicking the triangle to the left of a form header in the page tree will expand a list of forms available for viewing. In this example, The Biographic header has been expanded to show all of the forms that can be accessed. The number to the right of the form name indicates the number of data rows that exist for the entity. If there is no number listed, this means that there is no corresponding data for this entity on that form.

To navigate to any form listed under the Biographic header, click on the name of the form. The form will appear over the Entity Overview tab.* To navigate back to the Entity Overview tab, click Overview in the page tree or the left blue arrow in the navigation controls area at the top of the page.

*The address form will open in a new tab.

Actions Help

109-1506

Actions Help

Actions Help

rd Type Affil Year

Actions Help

Balance
0.00
0.00
0.00

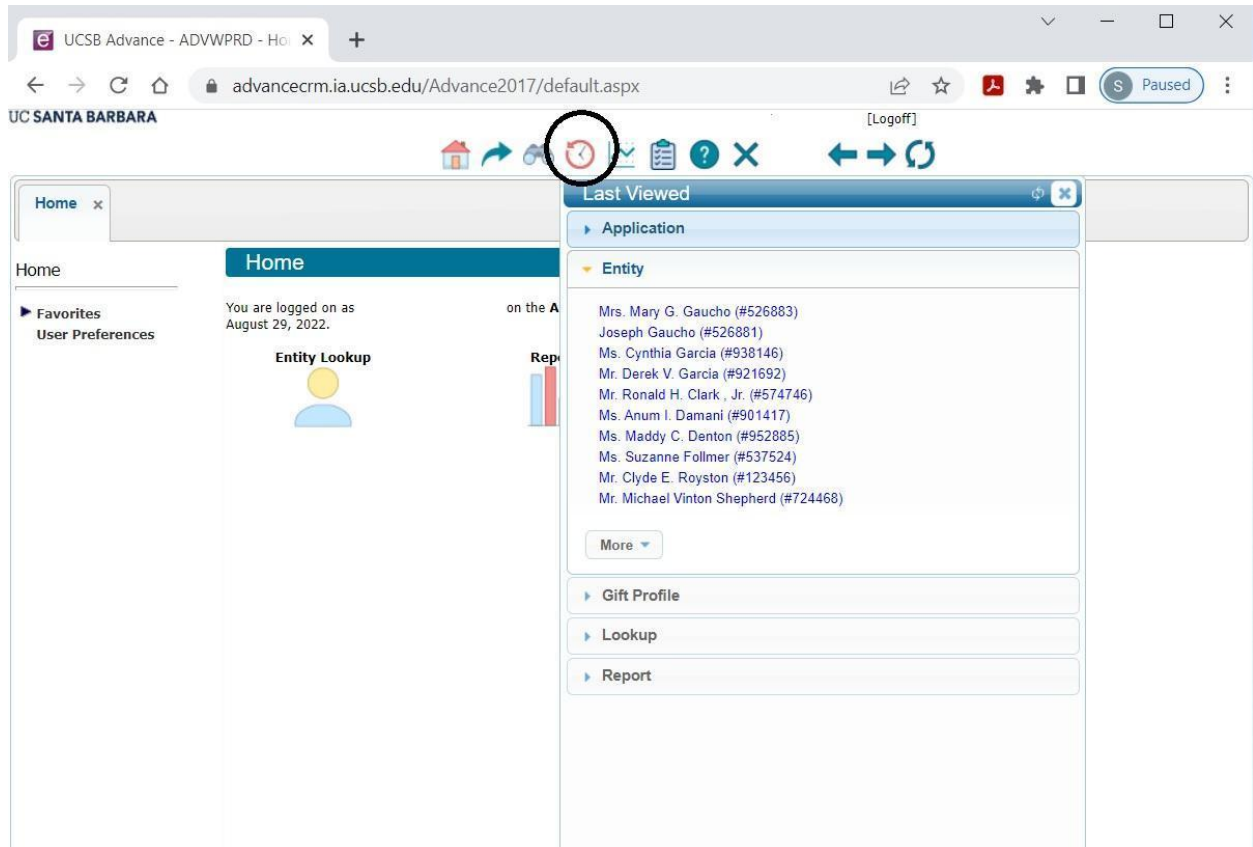
Actions Help

Clicking on the word next to each triangle will navigate to a **Summary Page** for that section (Biographic, Giving, Membership, Prospect). It will also open up the page tree listing the forms available under those sections. The image above shows the forms listed

under the Biographic branch. Clicking on the triangle will open or close the list of forms listed beneath it.

Using last viewed

Once you have viewed a record, lookup, or report in Advance Web CRM, you can access the last viewed button to see a historical list, and directly go to the record, lookup, report, or other options by clicking on the link.



Currently Open Applications

As you navigate through Advance Web CRM, each time you open a new application, a new tab opens at the top of the page. The application title corresponds with the name displayed on the tab.

To view an open application:

Click the tab of the application you wish to view. The selected application will display. If you do not plan on going back to an open application, closing its tab will make your use of "currently open applications" more manageable. The maximum for the number of currently open applications is 25. If you try to open an additional application, a message displays indicating you must close an application before you can open another. To close an application, click the X on the application's tab. To close all applications, click the X in the Main Menu at the top of the page.

Using Applications and Forms

Sorting Data in Forms

When information is displayed in a form, the list may be long and you might want to see items in a particular order. Forms which have blue and underlined headings can be sorted. Columns which do not appear in blue with an underline are not sortable.

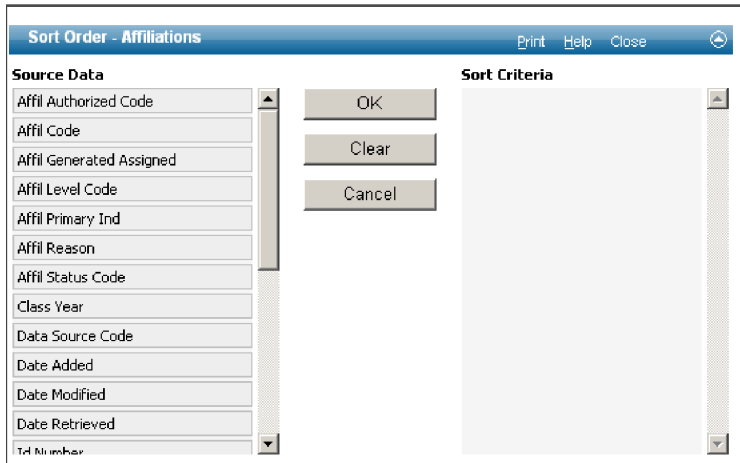
If you click on the heading of the column once, the sort order will change to ascending, with the lowest alphanumeric value at the top of the list. If you click the title again, the sort order changes to descending, with the highest alphanumeric value at the top of the list. If you click one more time, the sort order returns to the default.

If the item you wish to sort is not visible in the column header, you can sort the list as follows:



Select Actions: Sort from the Form Header that contains the list.

When the Sort Order prompt appears, drag-and-drop the item you want to sort from the **Source Data** column on the left to the **Sort Criteria** column on the right.

When you drag an item from the Sort Data column and drop it in the Sort Criteria column, it is automatically sorted in ascending order. Click the item in the Sort Criteria list to re-sort the item in descending order. To re-order items in the Sort Criteria column, drag the item within the column.





Ellipses Button

On many pages you will see the ellipsis button (). When this button displays, it is an indication navigation to more detail is available. When you click  you will navigate to the detail for the row on which the button appears. This process of expanding the detail of a row of information is referred to as 'drilling-down'.


Collapsible forms

When multiple Forms display within an application frame, a vertical scroll bar also displays to provide access to viewing the Forms off-screen. An arrow is visible on the far right of the form header for each form. As described earlier, information displayed beneath form headers can be:

1. Minimized (or collapsed) by clicking  or
2. Maximized (or expanded) again by clicking .

Go To


Another way to access biographic information, including the Entity Overview, is to use **Go To**. To access Go To:

1. Click Go To on the Main Menu. 
2. In Go To, select the appropriate application to display by entering the mnemonic or clicking the button to the left of the application name in the list.
3. Enter the Entity ID for which you wish the application to have currency (to view) even if you have already established currency on a different entity. When no ID number is provided and there is no currency on an entity, a Lookup prompt will allow you to establish currency for the data you wish to view. Some applications, e.g., Add Person or Staff Maintenance, do not require an ID and the 'Open with ID' field does not display. Also, on some applications ID is optional, e.g., Alerts. The list of applications brought up by Go To may be resorted by clicking on Application, ID, Mnemonic, or Type at the top of the 'Go To Applications' list, as mentioned earlier.
4. When you are finished entering the information, click 'Go' to navigate to the application you selected.

Bio Summary

You can use Bio Summary to display general biographic information for a person or organization entity. The Biographic Detail is also for a person or organization entity.

To display the Bio Summary for an entity:

1. Perform a Lookup  using either the entity's name or Entity ID to display the Entity Profile
2. Click 'Biographic' on the Entity Profile Page Tree **or** you can click Go To, select the Bio Summary application, enter an Entity ID in the 'Open with ID Lookup' field.
3. Click 'Go' and the Bio Summary will display.

The Bio Summary contains two forms, Biographic Detail and Biographic Detail (Birth & Death).

Biographic Detail is viewing only and displays general biographic information for the current entity. It is a collection of information which has been entered on other forms.

Data Fields:

Salutation	A general salutation used when addressing this person entity. This is the salutation that is normally used for letters (e.g., Mr. Smith, John, etc.). It is a required value for a person entity (not required for an organization entity), and will typically use the format Prefix + Last Name.
Status	Code describing the status of the entity.
Solicit Ctrl	Code describing whether the entity wishes to be contacted or not be contacted in a specific way.
Solicit Comment	A comment about Solicitation Control.
Gender	Code that describes the gender of the entity.
Children	This is the number of children that this person entity has. This field is updated automatically based on the number of entries in the Children application. This number includes the total number of children an individual has, even if no information other than the name of the child is known.
Source	Code describing the source that requested the addition of the entity to the database.
Added	Date the entity was first added to the database.
Bio Comment	A general comment about this entity.
Status Chg Date	The date the status of the entity was last updated.
Solicit Chg Date	The date the solicitation control code associated with the entity's mailing control record was last updated.

Alerts

Alerts provide important information about an entity (Alerts) to users who may access the entity's record. Once an Alert is attached to an entity, whenever the particular entity is displayed, an Alert is displayed. Alerts may be attached to a group of entities by using a Clipboard ID List. The Alert remains active until the active check box is no longer marked. You must manually change an Alert to make it inactive. To view the content of the Alert, click on the "ATTENTION" hyperlink and the Alert will display on the screen.

The screenshot displays the UC Santa Barbara CRM interface. At the top left, it says 'UC SANTA BARBARA'. In the top right, there is a '[Logoff]' link and a set of navigation icons. Below the header, there are two browser tabs: 'Home' and 'Entity Overview' (selected), which shows 'Joseph Gaucho #526...'. The main content area is divided into three sections:

- Entity Overview:** Shows 'Joseph Gaucho #526881' with details: 'Rec Type: Friend', 'Degree: BS 1999 College of Engineering (Major: Engineering - Computer) More...', and 'Prim Affil: Married: Mrs. Mary G. Gaucho #526883'. There is a red 'ATTENTION' warning.
- Contact Information:** Shows 'Home (Preferred)' at '250 Coromar Dr, Goleta, CA 93117-5583 503'.
- Alerts:** Shows 'Attention (1)' with an active alert: 'Urgency: Alert', 'Status: Active', 'Entity-based Symbol: test', 'Description: test', 'Comment: test', 'Source: Ms. Pauline F. Bustillos', 'Start Date: 06/18/2007', and 'Stop Date'.

Idle Timeout

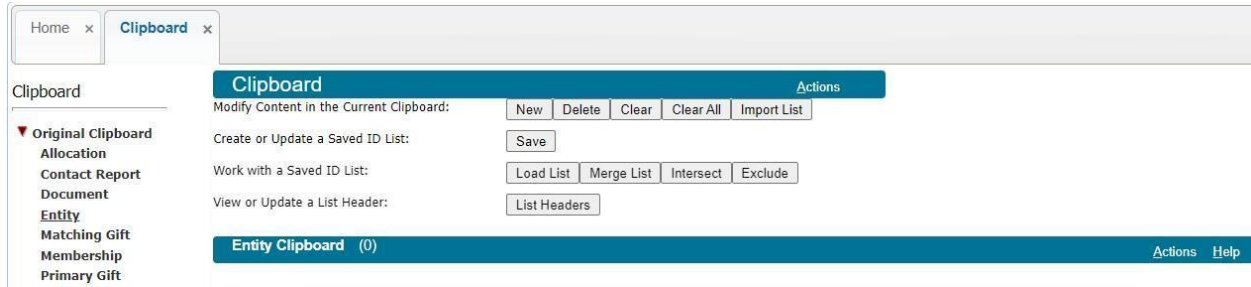
Although this will feel like an application you can keep open and idle, such as your e-mail account, Advance Web CRM acts much like an online commercial user site that will end your session if you are not using it for a period of time. After a prolonged period of idle, you will receive a note indicating that your session will expire in less than a minute, and then will count down, during which time you can decide whether to continue with your session or end the session. If you do not choose a button, the session will automatically close.

Entity Clipboard

The Entity Clipboard allows you to use IDs to view and/or modify data for an individual entity or group of entities associated with Biographic Attributes. ID results from Prospect, Gift, etc. Lookups are not copied to the Entity Clipboard. You may also save IDs you have identified via a Lookup and use them again.

Advance allows you to store and share multiple lists of database items that are created, viewed, saved and manipulated using the Clipboard. From the Clipboard you can use hypertext links to access entity profiles, prospect details, etc. You can also access previously saved ID Lists created by you or others.

You access the Clipboard application by clicking on the Main Menu. 



When you first open the Clipboard, it will be empty. If you copied the contents of a Lookup Results List, the rows of this data will display. The Clipboards available to you are displayed on the Clipboard page tree on the left of the page. If there are rows of data currently on a Clipboard, a value will display to the right of the Clipboard's name indicating how many rows of data are present.

Unique identifiers (ID numbers) for entities, gifts, pledges, prospects, program prospects, proposals, contact reports and allocations can be copied onto the Clipboard. You can manually add new list entries to the Clipboard while the Clipboard is displayed, or you can copy items into the current Clipboard list from another window.

The system will verify that the number is a valid ID and will add the appropriate item to the Clipboard. If the system does not recognize the identifier (if the ID Number does not exist), it will notify you but will still allow the item to be listed. To copy data to a Clipboard, for example, from a Lookup Results List, select one of the following commands from the Actions list:

Copy adds the currently selected row to the current Clipboard.

Copy/Replace replaces data on the current Clipboard with the currently selected row.

Copy All selects the entire list and appends the current Clipboard list.

Copy All/Replace selects the entire list and replaces the current contents of the Clipboard.

If you wish to selectively copy multiple rows, highlight each row and select Copy for each one. Each time you select Copy, it appends the list currently residing in the Clipboard. The Clipboard does not have to be open to copy to it, but you should be aware of which Clipboard is current. When you finish copying, navigate to the Clipboard to view the data you copied.

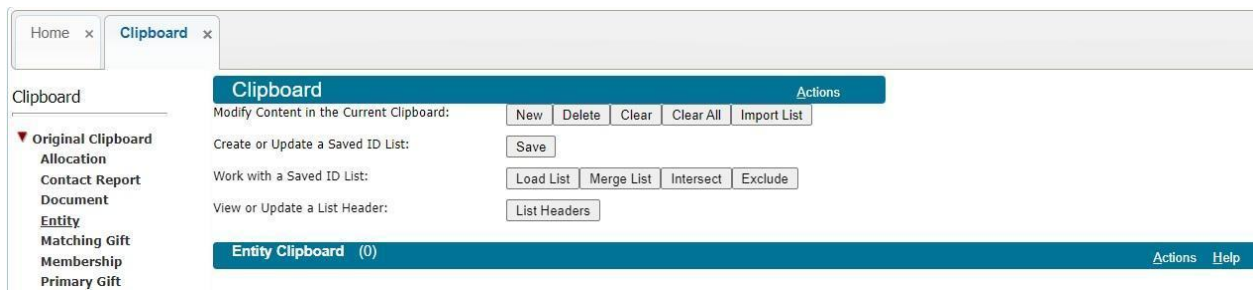
Each Clipboard entry contains at least two elements: a text-entry field, which is the unique identifier (ID number), and a hypertext link to the list item in the database. If you enter the identifier manually, the hypertext link is automatically filled in by the system.

The Clipboard allows lists to be saved and accessed by multiple users. There are 2 ways to view the current Clipboard list:

Click on the Main Menu.

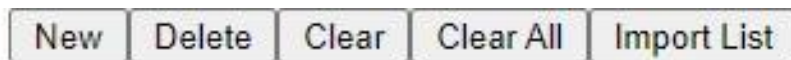
Press F4

Clipboard buttons



When you navigate to the Clipboard, you will notice there are several rows of buttons at the top of the application. Each row performs a different set of actions relative to the data contained in the Clipboard.

Modify content in the current Clipboard



When you have data in the current Clipboard, this row of buttons provides you with the following functionality:

If you wish to manually enter a new row while on the Clipboard, click the **New** button. A blank row will display. The row provides a field for a valid ID number and will display the hypertext link to the record when you tab from the field.

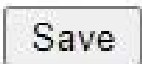
If you wish to delete a row of data, select the row and click the **Delete** button. The row will be removed from the Clipboard.

If you wish to remove the entire contents of the current Clipboard, click the **Clear** button. All rows of data in the Clipboard are deleted.

You are not limited to creating Clipboard lists from data within Advance. If you have an external file with valid Advance data (including Entity IDs), you can import the data. To import the list, click the **Import List** button to display the 'Import Clipboard File' window. Identify the type of file by clicking the Tab Delimited or Comma Delimited radio button. If the file contains a header row, check the check box. Navigate to the file using the Browse . . . button and indicate whether you wish to Import New (create a new Clipboard list) or Import Append (append the current list). The import occurs when you click the appropriate button.

If the list you are importing contains an ID which is not valid in Advance, the row will display an 'Invalid ID' message. To remove the row from the list, highlight the row and click the Delete button.

Create or update a Saved ID List



If you wish to save the list you are currently working with in the Clipboard, click the Save button. The Saved ID List application will display the ID Lists you own and those that are public.

Save ID List Actions

Clipboard Lists (1/1) Save New Actions Help

Name	Type	Owner	Share	ID Count
Mailing List for (BUS)	Entity	Mr. Abraham Arthur	<input type="checkbox"/> Private	14

Name*

Type

Category

Unit Business School

Delete Date (MM/DD/YYYY)

Description

Active Distribution List Temporary

Private Alert and Message List

Replace Saved ID List with Current Clipboard List

Enter a new Name and Category for the list and apply any other attributes you wish, such as:

Active A check in this box indicates the list is active.

Private If you do not want an ID List to be visible to other users, check the "Private" check box. If the check box is not checked, others can use the list, based on the security settings for the Clipboard. This feature is helpful when various tasks need to be accomplished by many users with the same group of entities.

Replace Saved ID List with Current Clipboard List

A check in this check box will overwrite the selected list with the list in the current Clipboard if you have the appropriate security settings.

Warning: The system will not prompt you with a warning when you check this box and click 'Save' to overwrite the saved list.

Distribution List IDs pasted to the Entity Clipboard can be saved as a Contact Report Distribution List using the check box labeled "Distribution List."

Alert and Message List ID lists can also be saved as a group of entities that can be alerted/messaged simultaneously. To save an ID list as an “Alert and Message” ID List, check the “Alert and Message” check box.



If you wish to make modifications to a Clipboard list you previously worked with and saved, click the **Load List** button. The Load ID List application displays. Identify the row which contains the list you wish to load on the Clipboard and click the ellipses button to the left of the row.

Load ID List Actions						
Load ID List (1) Actions Help						
	View	Name	Type	Owner	Category	ID Count
...		Mailing List for April	Entity	Mr. Abraham Ar	Museum Solicitation	14

The selected list will load onto the current Clipboard and its name will display on the Clipboard's form header. Make any modifications to the list, then, click the Save button.

Work with Saved ID List

When you have multiple ID Lists available on the Clipboard, you can perform a variety of actions on them:

Load List button: When you click this button the Load ID List form displays, as described in the previous section. Select the list you wish to load into the Clipboard by clicking the ellipses button to the left of the row.

Merge button: When you click this button the Load ID List form displays. Select a previously-saved list from the form, click the ellipses button, and it will merge the list with the current Clipboard list. If a list is not current on the Clipboard, you can load a list by clicking the ellipses button on the list you wish to load, then click the Merge button, select the list you wish to merge, and click the ellipses button. The Clipboard will append the second list to the first list. Any duplicate IDs will be removed on the merged list.

You can use this button to compare two Clipboard lists and see which IDs the two lists have in common. This involves having at least one of the lists as a Saved ID List. With one of the lists displayed on the Clipboard, click the **Intersect** button to display the Load ID List form. Select the second list. The Clipboard displays the IDs that are in common with the two lists.

You can use this button to compare two Clipboard lists and see which IDs do not appear on both lists. This involves having at least one of the lists as a Saved ID List. With one of the lists displayed on the Clipboard, click the **Exclude** button to display the Load ID List form. Select the second list. The Clipboard displays the IDs that do not appear in both lists.

Below is a step-by-step example using Clipboard lists with the Exclude, Intersect and Merge buttons:

1. Create a list of entities who gave a gift this year and save the Clipboard.
2. Create a Clipboard list for all Business School graduates by either creating it manually or selecting a saved Clipboard.
3. To add entities that live in Waltham, MA to the current list, perform a lookup and copy the data to the Clipboard OR select the Merge Lists button and select a saved list of Waltham, MA IDs. Save this list.
4. To exclude the entities who have already given a gift this year from this list, select the Exclude Lists button and select the Clipboard list created in Step 1. You now have a list of entities who have not given this year. Save this list.
5. To get a list of Business School graduates and Waltham, MA entities who gave this year: Clear the Clipboard and select the ID list saved in Step 3. Select the Intersect button and select the list created in Step 1. You now have a list of Business School graduates who are Waltham, MA entities who gave this year. Save the list.

View or Update a List Header

When you click the List Headers button, the Clipboard Lists form displays. This functionality is different than List ID, which only shows the clipboard lists for your current context. This form displays the clipboard lists you have access to (depending on security settings) across all contexts.

Save ID List
Actions

Clipboard Lists (My Lists) (1/15)
Save Actions Help

Name	Type	Owner	Share	ID Count
QTP523	Entity	Mr. John Smith	<input type="checkbox"/> Private	32
QTP531	Entity	Mr. John Smith	<input type="checkbox"/> Private	32
QTP550	Entity	Mr. John Smith	<input type="checkbox"/> Private	32
QTP613	Entity	Mr. John Smith	<input type="checkbox"/> Private	44
QTP748	Entity	Mr. John Smith	<input type="checkbox"/> Private	32
QTP797	Entity	Mr. John Smith	<input type="checkbox"/> Private	32

Name*

Type

Category

Unit

Delete Date (MM/DD/YYYY)

Description

Active Distribution List Temporary

Private Alert and Message List

Replace Saved ID List with Current Clipboard List

Attributes can be modified, lists can be replaced and deleted, but new lists cannot be created on this form. The default view is 'My Lists' and the Actions List provides you with the option of displaying the following additional clipboard lists:

- Private & Public Lists
- Private Lists
- Public Lists

VCR controls



(Left to right: First, Previous, Next, Last)

The 'VCR' controls allow you to navigate the current Clipboard. The numbers displayed to the left of the controls indicate the current record selected, along with the total number of Clipboard records. You can move to each row by clicking Next or Previous. You may also move to the beginning or end of the list by clicking First or Last. To move to a specific row, type the number of the row in the text box and press 'Enter'. The row entered displays at the top of the list.

Form header Action list

The Actions list contains a list of commands, Sort, Audit Info, Print Form, Export Form and Delete. You can access them by hovering your cursor over Actions to display the list.

Print Form

When you select Print Form, a new browser window will open with the contents of the current Clipboard. To print this window, select **Print This** at the top of the page. If you do not wish to print the window, select **Close This** at the top of the page to close the window.

Export Form

You may wish to export the contents of a Clipboard to work with the data in another application. To do this, select 'Export Form' from the Actions menu on the form header while viewing your Clipboard. Your Clipboard contents will be exported as a comma separated file (.csv) and you can choose to either view the file first or save it directly to your computer.

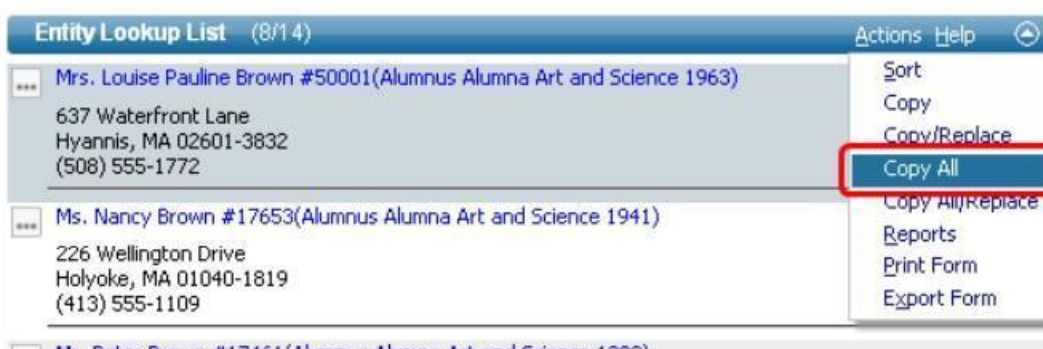
How do I...


At the beginning of this section, you were introduced to how the Clipboard works. In the following pages, we'll walk through the step-by-step use of the Clipboard.

Copy items to the Clipboard

To copy the results of your lookup to the Clipboard:

1. Identify the type of lookup and criteria which will provide you with the Lookup Results you wish to copy to the Clipboard.
2. On the Entity Lookup List header, which is what was selected for this example, display the Actions Menu and highlight "Copy All" with your cursor.



3. You may repeat the action in Step 2 as many times as you wish with multiple Lookup Lists. Each time, you will copy the entire list to the appropriate Clipboard and append the existing list on the Clipboard. Please refer to page 40 for more information on copying to the Clipboard.
4. Click  on the Main Menu. The Clipboard application will display with the results of your 'Copy All'.



Clipboard Actions

Modify Content in the Current Clipboard: New Delete Clear Clear All Import List

Create or Update a Saved ID List: Save

Work with a Saved ID List: Load List Merge List Intersect Exclude

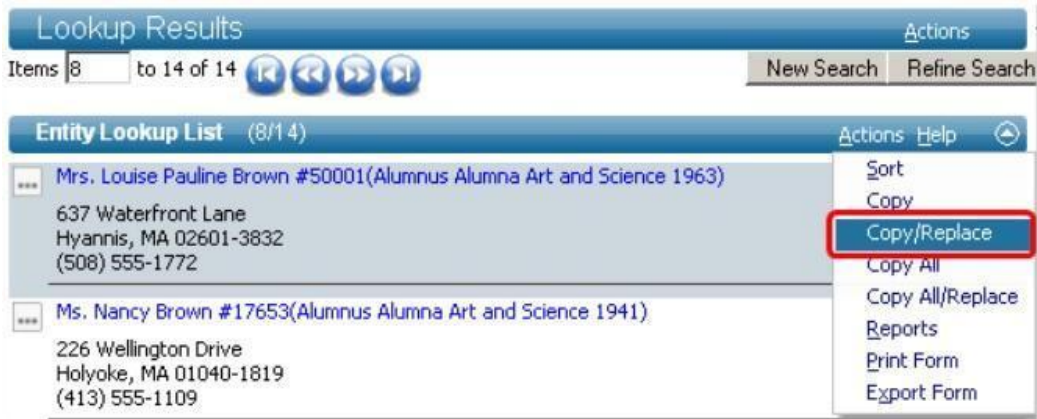
Entity Clipboard (14) Actions Help


ID	
1001062	Brown Distribution
18762	Ms. Arlene Beverly Brown
17234	Ms. Arlene Beverly Brown

Copy/ Replace items on the Clipboard

There may be an occasion when you wish to replace the current contents of the Clipboard with different data. To Copy/Replace items on the Clipboard:

1. Identify the type of lookup and criteria which will provide you with the Lookup Results you wish to copy to the Clipboard.
2. On the Entity Lookup List header, which is what was selected for this example, display the Actions Menu and highlight "Copy/Replace" with your cursor. This will replace the current contents of the Clipboard with the selected row on your Lookup List. Selecting "Copy All/Replace" replaces the current Clipboard contents with your entire lookup list.



3. Each time you select Copy/Replace or Copy All/Replace, you will replace the current Clipboard with your selection. Please refer to page 40 for more information on copying to the Clipboard.
4. Click  on the Main Menu. The Clipboard application will display with the results of your 'Copy/Replace' or 'Copy All/Replace'.

Create an ID List

Once you copy IDs to a Clipboard, you can save them for your own use at another time or you can share the Clipboard with others:

1. On the Clipboard application, with your Clipboard list displayed, click the Save button to save your list.
2. The Save ID List application will display. Any previously saved Clipboard lists will display on the Clipboard Lists form.

Save ID List Actions

Clipboard Lists (1/1) Save New Actions Help

Name	Type	Owner	Share	ID Count
Mailing List for (BUS)	Entity	Mr. Abraham Arthur	<input type="checkbox"/> Private	14

Name*

Type

Category

Unit Business School

Delete Date (MM/DD/YYYY)

Description

Active Distribution List Temporary

Private Alert and Message List

Replace Saved ID List with Current Clipboard List

3. Click "New" on the Clipboard Lists form header and fill in the fields with the appropriate information. Click Save on the form header when finished.
4. After saving your list, it will display as a row on the Clipboard Lists form.
5. You can apply security to the Clipboard list, if you wish. Public Clipboards must have security assigned.

Import an ID List

You can import a list from an external file to either create a new Clipboard list or append an existing list:

1. While current on the Clipboard, click the **Import List** button to import a list created in another application containing valid Entity IDs. The Import Clipboard File window will display.
2. Identify the type of file, either Tab Delimited or Comma Delimited, and whether the first row of the file is a header row. Enter the directory path and name of the file or click the **Browse . . .** button to navigate to the location and select the file.
3. If you are importing a new file, click the **Import New** button; if you are appending a current Clipboard, click the **Import Append** button. Once you click the appropriate button, the action you selected will display the results on the Clipboard form.

4. Either use the Clipboard or save the Clipboard for future use.

Load a Saved ID List

Once Clipboards are saved in Advance, if they are public, they can be used by others or, if private, only you have access to them and can use them any time you wish:

1. Navigate to the Clipboard and click the **Load List** button.
2. If the Clipboard is currently displaying a list, a dialog box will display confirming you wish to overwrite the current Clipboard. If you are finished with the current Clipboard and have saved it, click OK, otherwise, save your Clipboard first.
3. The Load ID List form will display all saved ID Lists available to you.
4. Click the ellipses button on the left of the row containing the list you wish to load onto the Clipboard.
5. The Clipboard will display with the contents of your ID List.

Export the contents of a list

It is possible you need to use a Clipboard list for something outside of Advance. To export a list:

1. Load the Clipboard list you wish to export.
2. On the current Clipboard's form header, select Actions > Export form. The File Download window will display.
3. Either open the file to view the list, then save it or click Save to save the file without viewing.
4. When you save the file, rename it from the default name of "ReportExport.csv" and navigate to the appropriate directory for storing the file.
5. When the file is downloaded, the "Download complete" dialog box will display.
6. If you are finished working with the file, click the **Close** button to close the dialog box.

Delete a Saved ID List

Once Clipboards are saved in Advance, if you have access to them and determine they are no longer needed, you can delete them:

1. Navigate to the Clipboard and click the **List Headers** button.

2. Select the list you wish to delete from the Clipboard Lists form. If the list you wish to delete is not displayed on the default 'My Lists' list, select the appropriate list from the Actions list.
3. Once the ID list you wish to delete is displayed, select Delete from the Actions list. Click OK on the Confirmation Dialog to confirm you want to delete the current list.

Note:

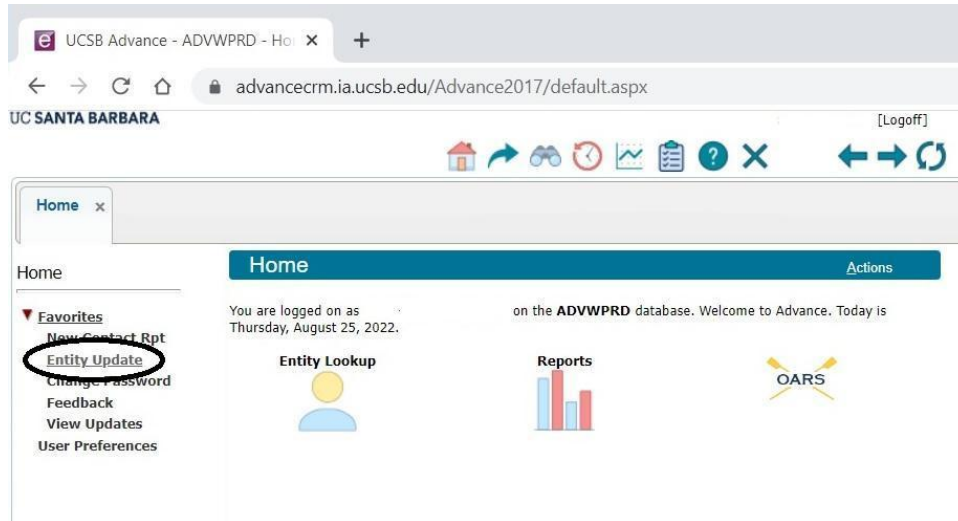
The Clipboard Lists you have access to are dependent on security settings.

Clipboard Security

When you save a Clipboard, you can either identify the Clipboard as a private or public Clipboard list, as mentioned earlier. A private list will only be available to you. A public list will be available to whomever you designate in the Security form and their rights will identify how they can use the list.

Entity Update

Click on Entity Update on the left page tree.



The first screen on Entity Update is **Primary Name/Details**.

If you know the Advance ID number, enter it in the ID fields and click on the magnifying glass or press the Tab key.



Home x Primary Name/Details x

Entity Update

- Primary Name/Details
- Spouse Information
- Address
- Email Address
- Employment
- Telephone
- Additional Information

Primary Name/Details Actions

Enter and/or change the desired information. To enter all new information, click Clear. Click Save when completed. If you wish to create a new Entity record, the Entity ID# field must be blank.

Please note that Mail Name and Salutation are required, but they will be constructed from the values entered in Prefix, First Name, Middle Name, Last Name, Suffix and/or Professional Suffix. Prefix is required in order to construct the Salutation.

Primary Name/Details Save Actions Help

Entity ID (if known):

Last Name*

First Name

Middle Name

Prefix

Suffix

Professional Suffix

Mail Name

Salutation

Status*

Entity Type*

Class

School

Gender Unknown

The entity information will autopopulate the Primary Name/Detail screen.



Home x Primary Name/Details x Mrs. Mary G. Gaucho #52688...

Entity Update

- Primary Name/Details
- Spouse Information
- Address
- Email Address
- Employment
- Telephone
- Additional Information

Primary Name/Details Actions

Mrs. Mary G. Gaucho #526883 (No Contact Requested)
 Rec Type Friend
 Degree BA 1999 College of Letters & Science (Major: Communication Studies)
 Prim Affil Widowed:

Names ↕

- Primary Mrs. Mary G. Gaucho
- Maiden Name Ms. Mary Go Frisbee

Enter and/or change the desired information. To enter all new information, click Clear. Click Save when completed. If you wish to create a new Entity record, the Entity ID# field must be blank.

Please note that Mail Name and Salutation are required, but they will be constructed from the values entered in Prefix, First Name, Middle Name, Last Name, Suffix and/or Professional Suffix. Prefix is required in order to construct the Salutation.

Primary Name/Details New Save Actions Help

Last Name*

First Name

Middle Name

Prefix

Suffix

Professional Suffix

Mail Name

Salutation

Status* No Contact Requested

Entity Type* Friend

Class

School

Gender Female

If you are already viewing a record, and see that something needs to be updated, click on Entity Update, and a new tab will open that autopopulates the entity's current data into the Entity Update screens.

Existing record information will appear on the screen, and to the right, additional information that exists in the record. Enter the new information in any of the existing fields, or select from the right column to autopopulate the change request. Click **Save** on the form header bar to proceed to the next screen, Address - or - if there is no information on the current screen that needs to be updated, click on one of the options to the left. You can navigate to any screen within Entity Update at any time.

Spouse Information

UC SANTA BARBARA [Logoff]

Home x Spouse Information x

Mrs. Mary G. Gaucho #52...

Entity Update

Primary Name/Details

Spouse Information

Address

Email Address

Employment

Telephone

Additional Information

Spouse Information
Actions

Mrs. Mary G. Gaucho #526883 (No Contact Requested)

Rec Type Friend

Degree BA 1999 College of Letters & Science (Major: Communication Studies)

Prim Affil Widowed:

Enter and/or change the desired information. To enter all new information, click Clear. Click Save when completed.

Spouse Information
Save Actions Help

Marital Status	<input type="text" value="W"/> Widowed
Spouse ID	<input type="text"/>
Spouse Name	<input type="text"/>
Joint Name 1	<input type="text"/>
Joint Name 2	<input type="text"/>
Joint Salutation	<input type="text"/>
Marriage Date	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>
Original Source	<input type="text" value="A"/> AWA
Change Source	<input type="text"/>

Address

UC SANTA BARBARA Suzie Follmer [Logout]

Home x Address x Mrs. Mary...

Address Actions

Mrs. Mary G. Gauchó #526883 (No Contact Requested)
Rec Type: Friend
Degree: BA 1999 College of Letters & Science (Major: Communication Studies)
Prim Affil: Widowed:

New/Updated Addresses on the Right Pane displays any pending Address data from this Entity Update session. Current Addresses on the Right Pane displays any existing Address data for this entity.

The Address hyperlink will open the entity's current addresses in a new tab.

Click New to enter new Address information. To modify existing Address information listed in the Right Pane, click the hyperlink and the data will appear below for updating. Click Save when completed.

Address Save Actions Help

This is a new address record.

Type* Preferred
Status* A Active
Title
Emp Name 1
Emp Name 2
Address
Foreign
City
State
ZIP
County
Country

Address

New/Updated Addresses (0)
Current Addresses (31)

Past Home
615 Alameda Padre Serra 888
Santa Barbara, CA 93103-2137
Status: Last Known Address

Past Home
120 North la Cumbre Road Apartment 28
Santa Barbara, CA 93110-1634
Status: Past

Past Home
120 North la Cumbre Road Apartment 35
Santa Barbara, CA 93110-1634
Status: Past

Past Home
924 De la Vina Street
Santa Barbara, CA 93101-3221
Status: Past

Past Home
4201 State Street
Santa Barbara, CA 93110-1818
Status: Past

Past Home
1234 De la Vina Street
Santa Barbara, CA 93101-3119
Status: Past

Past Home
Calle Aduana 29
28070 Madrid
34
Status: Past

Past Home
1212 State Street

The mailbox visible on the Address screen is an address validation system (Intuitim) that replaces QAS.

If you are requesting that a new address be added to the record, click in the Address field, then click on the mailbox. A pop up window will appear.

UC SANTA BARBARA [Logout]

Home x Address x Mrs. Mary...

Address Actions

Mrs. Mary G. Gauchó #526883 (No Contact Requested)
Rec Type: Friend
Degree: BA 1999 College of Letters & Science (Major: Communication Studies)
Prim Affil: Widowed:

New/Updated Addresses on the Right Pane displays any pending Address data from this Entity Update session. Current Addresses on the Right Pane displays any existing Address data for this entity.

The Address hyperlink will open the entity's current addresses in a new tab.

Click New to enter new Address information. To modify existing Address information listed in the Right Pane, click the hyperlink and the data will appear below for updating. Click Save when completed.

Address Actions Help

This is a new address record.

Type* Preferred
Status* A Active
Title
Emp Name 1
Emp Name 2
Address
Foreign
City
State
ZIP
County
Country

validate address Alt+V
search for new address Alt+L
mark as overridden Alt+O
mark as not validated Alt+N
exit

Address

New/Updated Addresses (0)
Current Addresses (31)

Past Home
615 Alameda Padre Serra 888
Santa Barbara, CA 93103-2137
Status: Last Known Address

Past Home
120 North la Cumbre Road Apartment 28
Santa Barbara, CA 93110-1634
Status: Past

Past Home
120 North la Cumbre Road Apartment 35
Santa Barbara, CA 93110-1634
Status: Past

Past Home
924 De la Vina Street
Santa Barbara, CA 93101-3221
Status: Past

Past Home
4201 State Street
Santa Barbara, CA 93110-1818
Status: Past

Past Home
1234 De la Vina Street
Santa Barbara, CA 93101-3119
Status: Past

Past Home
Calle Aduana 29
28070 Madrid
34
Status: Past

Past Home
1212 State Street

Select "Search for a new address" and start typing the address in the Address field. Intuitim will give you matching options to select. Once the address has populated the fields, Click **Save** and the Entity Update will automatically move to the next screen, Email Address.

Email Address

UC SANTA BARBARA Suzie Follmer [Logoff]

Home x Email x Mrs. M...

Entity Update

Primary Name/Details

Spouse Information

Address

Email Address

Employment

Telephone

Additional Information

Email

Mrs. Mary G. Gaucho #526883 (No Contact Requested)

Rec Type Friend

Degree BA 1999 College of Letters & Science (Major: Communication Studies)

Prim Affil Widowed:

New/Updated Emails on the Right Pane displays any pending email data from this Entity Update session. Current Emails on the Right Pane displays any existing email data for this entity.

The Email hyperlink will open the entity's current emails in a new tab.

Click New to enter new Email information, To modify existing Email information listed in the Right Pane, click the hyperlink and the data will appear below for updating. Click Save when completed.

Email Save Actions Help

This is a new email record.

Preferred

Email Address

Email Type

Email Status* Active

Email Code

Email Format HTML

Original Source Entity Update

Change Source

Comment

Email

New/Updated Emails (0)

Current Email(s) (1)

marygaucho@email.com (Primary Email, Pref)

Employment

UC SANTA BARBARA [Logoff]

Home x Employment x Mrs. Mary G. ...

Entity Update

Employment Actions

Mrs. Mary G. Gaucho #526883 (No Contact Requested)
 Rec Type Friend
 Degree BA 1999 College of Letters & Science (Major: Communication Studies)
 Prim Affil Widowed:

New/Updated Employment on the Right Pane displays any pending Employment data from this Entity Update session. Current Employment on the Right Pane displays any existing Employment data for this entity.

The Employment hyperlink will open the entity's current employment in a new tab.

Click New to enter new Employment information. To modify existing Employment information listed in the Right Pane, click the hyperlink and the data will appear below for updating. Click Save when completed.

Employment Save Actions Help

This is a new employment record.

Self Employed Primary Employment

Employer ID

Emp Name 1

Emp Name 2

Job Type*

Job Status

Title

Position Desc

Start Date / /

Original Source A AWA

Change Source

Employment

New/Updated Employment (0)

Current Employment (7)

Past Employer
Sales Associate
UCSB Bookstore

Past Employer
Sales Associate
Costco #706922

Past Employer
Vice President
GauchoBack Foundation #797755

Secondary Employer
Vice President
GauchoBack Foundation #797755

Past Employer
Owner
Starbucks

Primary Employer
Primary Employment
Vons

Past Employer
Owner
Jamba Juice

Telephone

UC SANTA BARBARA Suzie Follmer [Logoff]

Home x Telephone x Mrs. Mary G. ...

Entity Update

Telephone Actions

Mrs. Mary G. Gaucho #526883 (No Contact Requested)
 Rec Type Friend
 Degree BA 1999 College of Letters & Science (Major: Communication Studies)
 Prim Affil Widowed:

New/Updated Telephones on the Right Pane displays any pending telephone data from this Entity Update session. Current Telephones on the Right Pane displays any existing telephone data for this entity.

The Telephone hyperlink will open the entity's current telephones in a new tab.

Click New to enter new Telephone information. To modify existing Telephone information listed in the Right Pane, click the hyperlink and the data will appear below for updating. Click Save when completed.

Telephone Save Actions Help

This is a new telephone record.

Type*

Status* A Unverified

Country

Call Code

Phone Extension

Preferred
 Unlisted

Txt Msg Allowed

Original Source A AWA

Change Source

Comment

Telephone

New/Updated Telephones (0)

Current Telephones (15)

(805) 888-8888 (P)

(805) 123-4567 (Q)

(805) 789-4562 (P)

(805) 987-6555 (P)

(805) 967-3400 (P)

(805) 123-4567 (P)

(805) 123-4567 (P)

(805) 555-5555 (P)

(805) 123-4323 (P)

(805) 685-3199 (Q)

(805) 966-4444 (P)

(805) 455-5555 (P)

(805) 555-5555 (P)

(805) 123- (P)

(805) 555-5555 (P)

Additional Information (this screen not currently in use)

Once you are finished submitting updates, you can close the tab.

[How to Request a New Record Creation](#)

Click on Entity Update on left page tree.

The screenshot shows the UCSB Advance web application interface. The browser address bar displays the URL `advancecrm.ia.ucsb.edu/Advance2017/default.aspx`. The page header includes the text "UC SANTA BARBARA" and a "[Logoff]" link. A navigation bar contains several icons: a home icon, a back arrow, a forward arrow, a search icon, a refresh icon, and a question mark icon. A left sidebar menu is titled "Home" and lists "Favorites" with the following items: "New Contact Rpt", "Entity Update" (circled in black), "Change Password", "Feedback", "View Updates", and "User Preferences". The main content area has a "Home" header with an "Actions" link. Below the header, it displays "You are logged on as Thursday, August 25, 2022." and "on the ADVWPRD database. Welcome to Advance. Today is". There are three main sections: "Entity Lookup" with a person icon, "Reports" with a bar chart icon, and "OARS" with a crossed-out icon.

Leave ID field blank, and tab to the next field to add Primary Name/Details

UC SANTA BARBARA [Logoff]

Home x Primary Name/Details x

Entity Update Primary Name/Details Actions

Primary Name/Details

Spouse Information
Address
Email Address
Employment
Telephone
Additional Information

Enter and/or change the desired information. To enter all new information, click Clear. Click Save when completed. If you wish to create a new Entity record, the Entity ID# field must be blank.

Please note that Mail Name and Salutation are required, but they will be constructed from the values entered in Prefix, First Name, Middle Name, Last Name, Suffix and/or Professional Suffix. Prefix is required in order to construct the Salutation.

Primary Name/Details Save Actions Help ↻

Entity ID (if known):

Last Name*

First Name

Middle Name

Prefix ▼

Suffix ▼

Professional Suffix ▼

Mail Name

Salutation

Status* ▼

Entity Type* ▼

Class

School ▼

Gender ▼ Unknown

Click Save, and proceed through each screen to add information, if needed.

Once you have submitted an update, you can view it by selecting **View Updates** on the page tree.

UC SANTA BARBARA [Logoff]

Home x View Entity Updates x

Home View Entity Updates Actions Print

View Entity Updates View Entity Updates (3) Actions Help ↻

ID Number	Last	First	Operator Name
526883	Gaicho	Mary	

Favorites
 New Contact Rpt
 Entity Update
 Change Password
 Feedback
View Updates
 User Preferences

It will show the updates that you have submitted. Once the update has been accepted into Advance Web CRM through a validation process, the update will

disappear. You will be able to view the updates in the specific record, or will see a new record has been created with the information you submitted.

Advance Web CRM Terminology

The following table contains terms you will encounter when using or discussing Advance Web:

Application	Applications are comprised of one or more forms within the application frame of a Web page. Applications are located within a page and provide the interactive 'holding place' for additional elements, such as forms
Form	<p>A form is comprised of fields, which allow you to input values or select values during a lookup. A reference to a form in Advance Web is synonymous to a DataWindow in the Windows version of Advance.</p> <p>An example of a form is the Giving Summary form on the Entity Profile. Upon accessing the Entity Profile, you will see many forms, including the Primary Address, Affiliations and Giving Summary forms</p>
Form Header	A form header is the area that appears directly on top of the form. The form header allows you to perform many functions, similar to those functions found on the Advance Edit and Frame Bars in the Windows version of Advance. These functions include adding, modifying and saving data in the form, accessing the Online Help system, Printing the data in the form, viewing Audit Data and copying items to the Clipboard.
Main Menu	The Main Menu is the area that displays at the very top of the page. The Main Menu consists of icons for 'Home', 'Go To', 'Help', 'Logoff', etc.

<p>Metadata</p>	<p>By definition, metadata is data about data, or information about information. In the context of Advance Web, metadata is data stored in the database and controls the appearance and display of the various forms, pages and applications. When Advance Web displays a page, form or application, the underlying .NET Framework technology takes the metadata and translates it into viewable pages, forms or applications. This concept of using metadata to modify this information is a variation from the traditional method, which required PowerBuilder or InfoMaker to modify a Window or DataWindow, as in the Advance Windows.</p> <p>Using the Advance Configuration Utility, your system administrator can modify the metadata used by Advance Web and change the appearance and display of a column, label, etc. Additionally, using metadata, your system administrator can specify who will see each change by applying the changes to users who are associated with specific profiles.</p>
<p>Page</p>	<p>A page is comprised of one or more applications and is the foundation on which all interactions are based. A reference to a page in Advance Web is synonymous to a Window in the Advance Windows, i.e., the entire area within a window. Within the page area, you will find text elements, links, the page tree, forms, applications and form headers.</p> <p>An example of a page is the Home page. Upon logging in successfully, the Home page will display. The Home page is the dashboard for accessing the key areas of the system that are job-critical or that are referenced frequently.</p>
<p>Page Tree</p>	<p>The page tree is the primary navigation tool in Advance Web and is located on the leftmost vertical space of the page. However, it is important to keep in mind that the page tree is not the only navigation tool as the Main Menu provides additional navigation. The page tree has three general areas:</p> <ol style="list-style-type: none"> 1. Page Name - The first few rows plus a half-width row are reserved for the page name as well as any actions you may take. For example, the Actions Menu allows you to access the Clipboard or switch to a new entity ID (depending on the current page). 2. Page Tree - The page tree lists the applications that are associated with the displayed page. Each listed application in the

	<p>page tree expands to display the individual forms that are available to you, which constitute the selected application.</p> <p>3. Copyright Notification - Standard SunGard Higher Education copyright notification always appears at the foot of the page tree. This section of the page tree also contains links to privacy information, so that this information is accessible from any page within Advance.</p>
Profile	<p>The term Profile is used to describe a group or area within your organization, or your institution or organization as a whole. When configurations are made to pages, forms and applications in Advance Web, they are applied to specific profiles. Thus, you can configure Advance Web to appear one way for users that are associated with a profile and differently for users that are associated with a different profile.</p>
Profile Header	<p>The Profile header is the area that displays directly below the Main Menu. For Profiles that are entity ID specific, such as the Entity Profile, the Profile header will consist of the entity's name, record status, primary affiliation and spouse information. Depending on which profile you are current on (Entity Profile, Prospect Profile, Program Prospect Profile, etc.), information in the Profile header will change.</p>

[Advance Web CRM Shortcuts Menu](#)

F1	Advance Web Help
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Alt + F1	Access institution or organization site-specific context-sensitive Site Help
F2	Context-sensitive lookup (in Lookup controls)
F3	Enter New ID
Shift + F3	Spouse Information
F4	Clipboard
Ctrl + F4	Close Application (or "tab")
Shift + F4	Entity Lookup
F5	Go To
F6	New
F7	Refresh
F8	Save
F9	Activate Primary row selection, press F9 to toggle between primary lists. Use up and down arrows to move, press Enter to select a row
F10	Menu Bar (highlights Logoff; you can tab to other entries there)
F11	Paste (in Lookup controls)
F12	Copy (in Lookup controls)
Alt + I	Display audit info

Advance Web CRM Biographic Attributes Definitions

Activities

A person or organization can have related non-student activities. The activities are defined by your institution and affiliated entities are linked. Examples include homecoming, the inauguration of a new university president, etc. In addition, this table can be used to store important information related to the event such as special meals, start and stop date, fee information, payment information, menu, seat numbers and ticket information.

Addresses

Both organizations and person entities can have multiple addresses stored in the Address table. The address can be given particular start and stop dates and must be assigned an address type. Only one primary home and one primary business address type can be assigned for each entity. Seasonal addresses with their dates are also stored here. The mailing labels used by the Advance system are generated based on these addresses but the format or data can be changed and saved for mailing label use. Geo Codes, used to designate a geographic region can be attached to an address. Address types include home, business, past home, past business, seasonal, etc.

Admissions Volunteer Activities

A person entity can be an admissions volunteer for your institution or another. This is stored in the Admissions Volunteer table by creating a row for that entity.

Affiliations

An organization or person entity can have an affiliation with a particular academic unit, fund, or department. The Affiliations table stores information on affiliations and entities linked to those affiliations along with affiliation status and authorization. Examples include Class Officer, Foundation Board Member, Member of the Board of Trustees, etc.

Awards and Honors

Awards and honors can be linked to an organization or person entity. The information stored for the entity includes the date of the award or honor and the award or honor.

The values for the awards and honors are user assigned. Examples include Distinguished Alumni Award, Pulitzer Prize Winner, Congressional Medal of Honor, Eagle Scout, etc.

Bank Cards

The Bank Card table stores information on the Bank Cards used by an entity. It is generally used to record affinity bank card data. Information includes the card type, card status, expiration date, and card number. See the Security section of this document and the Advance Configuration Utility User Guide for a discussion on how Advance handles confidential information.

Comments

Although most tables in the Bio subsystem store a short comment on the table information, a separate, longer comment can be linked to the entity as a whole using the Comments table. Examples include Research Information, Stewardship Information, Harris Market Research Information, etc.

Committees

Committee memberships of a person or organization entity are stored in the Committee table. Committee information includes the entity's role and the source of the information. Examples include Annual Fund Committee, Presidential Search Committee, Faculty Development Committee, etc.

Corporate Hierarchy

An organization entity can be linked to other organization entities by organization relationship such as parent/subsidiary. These relationships can be formed into a hierarchy that is the corporate hierarchy for the organization entity. See the explanation of Corporate Hierarchy in the Relationships section found earlier in this document.

Covering Accounts

When the Primary Donor of a gift or pledge always shares some or all of the soft credit for the contribution with one or more associated donors, this connection can be saved and automatically supplied during gift entry in Advance. This feature is called a Covering Account. For example, a foundation might cover the pledges or gifts of a person. The Covering Accounts form allows you to set up this relationship and the percentage of a given gift that should be credited toward other entities.

Degrees

A person entity can be linked to information on the degrees they have earned. This information is stored in the Degrees table. The data stored can include the institution, FICE code, degree level, school, admission year, campus, date of attendance, date of graduation, class, department, major, concentration, honors, financial aid, advisor, thesis title, dissertation title and advisor. Degrees may be local, indicating the degree was awarded by your institution, or non-local, indicating the entity received a degree from an institution other than your own.

eContact

A person entity can be linked to any number of eContacts, whether they are for Home, Business or other. The data stored can include types such as Twitter, Facebook, LinkedIn, URL, and so on.

Email

A person entity can be linked to any number of email addresses, whether they are for Home, Business or other. The data stored can include the type of email, status, the actual address, format of the body of the email and audit information indicating when the status of the email last changed.

Employment

The Bio subsystem stores employment information for both organization entities and person entities:

For organization entities, the system automatically composes a list of employees based on the employment information linked to person entities. No non-entity employee can be linked to an organization entity.

For person entities, the Employment table allows you to link an entity to an employer organization entity or to store the name and details of a non-entity employer.

The Employment table stores: job status, the extent of employment this employer provides for this entity (part-time, primary job, etc.), nature of business, occupational name, job title, position description, position level, specialization and matching status. Based on this information, the system will know whether to look up an employer's matching record.

IDs

Alternate ID numbers can be stored for any entity. The ID is linked to the Entity ID together with information on the type of ID being stored. It can also be used as a

criterion when searching for an entity using the Entity Lookup. Examples include Legacy System ID numbers, Student ID numbers, etc.

Interests

The Interests table can link an entity to various user-defined interest areas. Entity Interests are meant to be quite broad. Examples include Arts, Athletics, Environmental Issues, Volunteer Activities, etc.

Mailing Lists

Advance keeps track of the mailings sent to an entity and any special instructions involved with a particular mailing to an entity. Examples include Alumni Magazine, Season Ticket Holders, President's Holiday Card Mailing, etc.

Matching Policy

Organization entities can have matching policy information. This information is automatically called upon when an entity on the employee list of an organization entity makes a payment on a pledge or sends a gift. A relationship between an organization entity with a matching policy record and a foundation entity through which the organization pays its matching gifts is established in the Matching Policy table, as well.

Names

Advance stores multiple names associated with a single Entity ID. Each name is stored as a row in the Names table together with its designated name type. Examples include Maiden or Former Name, Birth or Given Name, Nickname, etc.

Organization Contacts

An organization entity can be linked to organization contacts that are person entities in the system or to persons not in the system. The system stores the name of the organization contact, the Entity ID if applicable, title, salutation, phone number, and address. Examples include Grants Administrator, Higher Education Liaison, Public Relations Officer, etc.

Publications

Information about any publication authored by, or affiliated with, an entity can be stored in the Publications table and linked to an entity. Here, the year, title, magazine or journal name and publisher are stored. The name of any publication may be manually entered in this form rather than selected from a predefined list of publications.

Record Types

Each entity can be identified by its type of record. A single entity can have multiple record types. Each record type is stored as a row in the entity record type table. Examples include Alumnus/Alumna, Friend, Parent, Student, Corporation, Foundation, Government, etc.

Relationships

Personal relationship information is stored in the relationship database table as well as the children, entity and former spouse tables. Advance distinguishes between different types of relationships and allows you to set new relationship types in the Relationship table. These tables ensure that each relationship is handled appropriately (e.g. only one spouse is accepted) and reflexively (if an entity is a brother to a second entity then the second entity is a brother/sister to the first entity as well).

Organizations also need to store information on relationships between entities. A person entity can be linked to an organization entity as an organization contact. This information is stored in the organization contact table. An organization entity can also be linked to other organization entities by organization relationship such as parent/subsidiary. These relationships can be formed into a hierarchy that is the corporate hierarchy for the organization entity. The corporate hierarchy set up within the biographic subsystem can be used in other subsystems: giving totals in the Giving subsystem can be based on the corporate hierarchies set up here.

Salutations

A general salutation is stored with primary entity information in the entity database table, but other salutations can be stored for other uses by associating each salutation for the particular entity with a salutation type and an optional signer ID. Examples include Casual, Formal, President's Salutation, etc.

Special Handling

Special handling instructions are stored in this table as they relate to person or organization entities.

Sports

The Sports table contains information on a person entity's participation in a sport while attending your institution.

Student Activities

A person entity's participation in activities, while a student at your institution, is stored in the Student Activity table.

SIC Codes

Organization entities' Standard Industry Classification (SIC) Codes are stored in the SIC table.

Telephone

A person entity can have any number of telephone numbers, whether they are for 'H'ome, 'B'usiness, Fax, or Mobile. 'H' and 'B' types will be automatically linked to 'H' and 'B' address records. Other phone types must be manually linked to and unlinked from address records.

Volunteer Activities

A person entity's participation in volunteer activities within your institution is stored in the Volunteer Activity Table. Examples include Development Council, Campaign 2000 Alumni Chairperson, etc.