Introduction to Advance Web

Chapter 1: Overview, Navigation, Entity Lookup

March 1, 2012

SunGard Higher Education

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Introduction

• Breaks
• Lunch
• Introductions
• Curriculum notes

Objectives

• Learn how to navigate the Advance Web application
• Gain hands-on experience with features and functions
• Discuss implementation considerations along the way
Advance Mission Statement

All 'users' have on-demand hands-on access to appropriately secured information and services which is provided via a dynamically generated web browser user interface tailored to their specific needs, permissions, and preferences.

On-Demand Hands-On Access

• Web-Browser User Interface
  — Thin client
  — Secure access/restriction to data
  — Choice of browsers (e.g., Internet Explorer, Firefox, Safari, Google Chrome)
  — Options in workstation configuration
Tailored to the User

- Advance Web’s user interface is context-aware and can dynamically present and configure pages based on a user’s attributes
  - Site Profile
  - Department and/or Role Profile(s)
  - Security
Product Direction – Advance Web

- Product ‘viability’ (contemporary technology)
- Tangible benefits
  - Cost savings
    - Software deployment
    - Computer configuration
    - Help desk support
  - Increased access
  - Opportunities for new tactical and strategic initiatives

What is Advance Web?

- Biographic
  - Categorize donors based on interests, locations, affiliations, and so forth
- Giving
  - Create/Maintain giving history, generate invoices and acknowledgements
- Prospect Tracking
  - Maintain/Monitor major donor activity and contact
- Membership
  - Manage annual memberships, clubs and dues; maintain member history
What is Advance Web?

- **Events Management**
  - Maintain event planning information and invitation lists
- **Reporting**
  - Provide easy to use end-user reports; generate reports based on custom criteria
- **Other Output**
  - Produce mailing labels, mail merge files, and ad-hoc reporting

Advance Management

- **Table Management System (TMS)**
  - Tables containing values, settings and defaults defined by your organization
    - Populates most of the dropdown lists in Advance
- **Configuration Utility**
  - An application used to administer user access rights, levels of security, form configuration and other administrative utilities
**The Entity**

- Starting point for all tracking and management in Advance Web
- Advance term for a person or organization in the database
- An entity can be a friend, alumni, prospect, donor, and so on
- Each entity is assigned a unique identifier called an Entity ID
Logging In

- Open your browser, type the appropriate path for the Web Interface logon page
- When the Advance Logon screen displays, type your User Name and Password (case sensitive)
- Click Logon

Home Page

- Quick access to key areas of Advance
- May be configured by your System Administrator(s) to display information specific to your role or organization
  - A development officer might view prospect-related information and annual fund staff may see campaign statistics and total money raised
Home Page – Messages

- Information that displays for a specific user when logging in with User Name
- Displays on the Home Page when the
  - message is created with the User ID of the person logging in
  - message is active
  - message type is M for message
  - the current date is equal to or greater than the start date of the message; the stop date is equal to or less than the current date
  - system option value #33 is set to 1 or 2
Home Page – Messages

Name of user logged in based on User Detail in Security Profile

Home Page – Tasks

- Fast way to access all of the tasks for which you are responsible
- Considered “your task” when
  - you are the staff member assigned to complete the task
  - the task does not have a completion date
    - Any task that does not have a completed date will display as task regardless of the status
  - the task is an entity, prospect, program prospect, proposal, or allocation task
Home Page – Tasks

Click on column header link to change display sort order

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Name</th>
<th>Task</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mr. Andrew Jackson</td>
<td>Correspondence</td>
<td>Pending</td>
</tr>
</tbody>
</table>

Link to the task

Link to Entity, Prospect, or Proposal Overview depending on task type

Home Page – My Contact Reports

- Displays a list of your contact reports
- Considered “your contact report” when
  - you are on a distribution list that includes the contact report
  - you are the staff member author of the contact report
  - the contact report is for an entity, prospect, program prospect or proposal
  - the contact report has a start date that precedes the current date by no more than seven days (# of days can be changed via Configuration Utility)
Home Page – My Contact Reports

- Link to entity, prospect, or proposal record based on contact level
- Link to contact report

Home Page – My Prospects

- View all prospects that you are assigned to as primary solicitor
- Considered “your prospect” when
  - you are the primary solicitor responsible for the prospect
    - Primary solicitor in assignment type table is set to Y (for Primary)
  - Prospect and Prospect Assignment are both set to Active
  - Staff member ID that is assigned to the prospect matches your ID
Home Page – My Prospects

- Link to prospect record
- Link to staff entity profile

Home Page – My Prospect Summary

- Summary of money that is expected to be received by your prospects; grouped by stage

<table>
<thead>
<tr>
<th>Stage</th>
<th>Cur Year Amt</th>
<th>Next Year Amt</th>
<th>No Year Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identified</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Cleared for solicitation</td>
<td>0.00</td>
<td>0.00</td>
<td>50,000.00</td>
</tr>
<tr>
<td>TOTAL</td>
<td>0.00</td>
<td>0.00</td>
<td>50,000.00</td>
</tr>
</tbody>
</table>
Home Page – My Prospect Summary

- **Stage**
  - Groups most recent prospect stages

- **Curr Year Amt**
  - Total dollars expected to be received in the current fiscal year
  - $ from Expectation field of prospect record
  - Based on expected date in fiscal year

- **Next Year Amt**
  - Total dollars expected to be received in the upcoming fiscal year
  - $ from Expectation field of prospect record
  - Based on expected date in next fiscal year

- **No Year Amt**
  - Total dollars expected in an unspecified time or after the upcoming fiscal year
  - $ from Expectation field of prospect record
  - Expected date is empty or is in a fiscal year after the next
### Home Page – Last Viewed

- Provides links to the most recently viewed information and entities
  — Dynamically refreshes with newly viewed information

<table>
<thead>
<tr>
<th>Last Viewed</th>
<th>Action</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entry</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. Andrew Jackson (17962)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. Robert Lankford (19027)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Prospect</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. Andrew Jackson (180189)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ms. Camille Harrison (100190)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Proposal</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. Andrew Jackson (100292)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Main Menu

<table>
<thead>
<tr>
<th>ADVANCE</th>
<th>Action</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home – Quick link to Home page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GoTo – Quick access to other forms and pages (F5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lookups – Access standard and advanced lookups</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reports – Generate institution reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clipboard – Access the clipboard application</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Help – Details uses and steps for using various pages and forms; links to custom site Help file</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Close All – Closes all open tabs/applications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Back/Forward – Move to previous and next pages and forms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refresh – Refreshes current page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Logoff – Logoff current session</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Go To Menu

- Allows quick movement to a specific application
  — Alternative navigation links may also exist to access applications
Go To Menu

- Select application and enter appropriate ID, if necessary
  — Open with ID field only present when needed

Currently Open Applications

- Tabs provide access to open applications
- Default number of applications is 10
  — Controlled by System Admin (set in the Advance web.config file)
Favorites

- Quick access to favorite applications
- Can be configured by System Administrator

Task 1 – Log in and Practice Navigating
What Is a Lookup?

- Built-in feature that allows end users to query the database for a single record or a group of records based on entered criteria
- List of records will be retrieved and displayed based on criteria entered

Accessing the Lookups Page

- Click the Lookups icon to access Advance Web’s lookup functionality
Two Types of Lookups

- Quick Lookup (Standard Lookups)
- Advanced Lookup

Quick Lookups

- Allows you to search for information within an Advance sub-system
  - Find all active Board of Trustee members
- The format of output results is predetermined and will change depending on the default for that type of lookup
Introduction to Advance Web

Advanced Lookups

- Allows end users to perform a search with criteria from a combination of Advance sub-systems
  - Find all Active Board of Trustee members who are Alumni who live in Arizona and have given $500 or more in the current fiscal year
- User defines format of output results

Basic Lookups

- Default selections for Template, Results Format, and Output Type display
- Use defaults or select different values
- When you select a different template, results format will change accordingly
Basic Lookup Templates

- User selects predefined lookup template from the Template dropdown

- Templates have pre-defined attributes for establishing lookup criteria (i.e., address, name, affiliation)
- Lookup form will change based on template chosen
Basic Lookup Templates

- Selecting additional attributes from the Lookups page tree is considered a variation
- No template displays in the dropdown
  — This is an Advanced Lookup
Basic Lookup Templates

- Some templates consist of one lookup form; others consist of various forms
- Template lookup forms are the equivalent forms from the Lookups page tree
  - For example, the Bio-Entity template displays ID, Entity, Address and Geo Code lookup forms
  - These same forms/fields can be accessed individually from the Biographic branch of the Lookups page tree

Use of Operators

<table>
<thead>
<tr>
<th>Operator</th>
<th>Definition</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Data must be equal to the entered value</td>
<td>State = New York</td>
</tr>
<tr>
<td>&gt;</td>
<td>Data must be greater than entered value</td>
<td>Amount &gt; 9,999</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Data must be greater than or equal to the entered value</td>
<td>Class Year &gt;= 1996</td>
</tr>
<tr>
<td>&lt;</td>
<td>Data must be less than entered value</td>
<td>Date of Record &lt; 1/1/2010</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Data must be less than or equal to the entered value</td>
<td>Gift Amount &lt;= $100,000</td>
</tr>
<tr>
<td>!=</td>
<td>Data not equal to the entered value</td>
<td>Allocation Annual indicator != 'Annual'</td>
</tr>
</tbody>
</table>
Use of Operators

<table>
<thead>
<tr>
<th>Operator</th>
<th>Definition</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIKE</td>
<td>Data compares partially to the entered value</td>
<td>Allocation code LIKE ‘ABG%’</td>
</tr>
<tr>
<td>Begins with</td>
<td>Data begins with typed value followed by any character</td>
<td>Last name Jack%</td>
</tr>
<tr>
<td>Ends with</td>
<td>Data ends with typed value preceded by any character</td>
<td>Last name %son</td>
</tr>
<tr>
<td>Contains</td>
<td>Data contains value preceded or followed by any character</td>
<td>Last name %ack%</td>
</tr>
</tbody>
</table>

Entity ID Lookup

- Every entity is assigned a unique Entity ID that can be used to perform a lookup
Entity ID Lookup

- Enter Advance Entity ID; click Search or hyperlink which opens Entity Overview

Entity ID Lookup Results List

- If more than one match, a results page displays (e.g., search for last name of Jackson)
- Click on the entity name link to display the Entity Overview
**Entity Overview**

**Alternate ID Lookup**

- Enter Alternate ID (e.g. legacy id or SSN)
- Click Search to display results
Task 2 – Perform an Entity Lookup by Entity ID and Alternate ID

Entity ID Lookup Tip

- Switch to a new entity record without using Lookup
- If you know the Entity ID, press F3 from an Entity record to access the Enter New ID prompt
  — Note: F3 closes the entity record for the previous entity
Task 3 – Use the F3 function key

Entity Name Lookup

- Enter complete or partial last name, first name or both
- Select an operator (default = Begins with)
- Click Search
## Task 4 – Perform an Entity Lookup by Name and work with Lookup Results

**Entity Lookup Results**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrew Jackson</td>
<td>100 West Boulevard, Montréal, Canada</td>
</tr>
<tr>
<td>Andy Jackson</td>
<td>231 Hartdale Avenue, White Plains, NY</td>
</tr>
<tr>
<td>Mr. Andrew Jackson</td>
<td>19992 Alumnus Alumna Art and Science 1953</td>
</tr>
<tr>
<td>Mrs. Andrew Jackson</td>
<td>231 Hartdale Avenue, White Plains, NY</td>
</tr>
<tr>
<td>Mr. Ed. Jackson</td>
<td>19992 Alumnus Alumna Business 1972</td>
</tr>
<tr>
<td>Mr. J. E. Jackson</td>
<td>703 High St,﻿using(Alumna Alumna Art and Science 1972)</td>
</tr>
<tr>
<td>Mr. Jeffrey Jackson</td>
<td>100 Main St, Littleton, CO 80111</td>
</tr>
<tr>
<td>Mrs. Paula Jackson</td>
<td>100 Old Mill Rd, Dedham, MA 02026</td>
</tr>
<tr>
<td>Mrs. Paula Jackson</td>
<td>100 Old Mill Rd, Dedham, MA 02026</td>
</tr>
</tbody>
</table>

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Entity Address Lookup

- Enter address criteria
  - Indicate whether the address should be the preferred address
  - Enter address type (e.g., home, business)
  - Enter a complete or partial address (e.g., Malvern, PA or PA)
  - Enter a zip code
- Click Search

Entity Address Lookup

- Preferred Address
  - The address for which the entity prefers to receive mail.
  - An entity can have only one preferred address
Other Entity Lookup Options

- Limit search by Status (e.g. Active)
- Find records by Primary Record Type, School, Class, or Affiliation
- Use Wildcards
  - Underscore (_) replaces a character
  - Percent sign (%) replaces a string of characters

Task 5 – Perform other address lookups and practice lookups with wildcards
ID Lookup Fields

- Allows for a context sensitive, entity lookup directly from the field
- Press the F2 key in the ID Lookup field to perform an entity lookup

F2 Lookup will populate ID field

QUESTIONS?