Gift and Fund Management

Campus Unit Administrator Guide

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Gift and Fund Management Unit Administrator

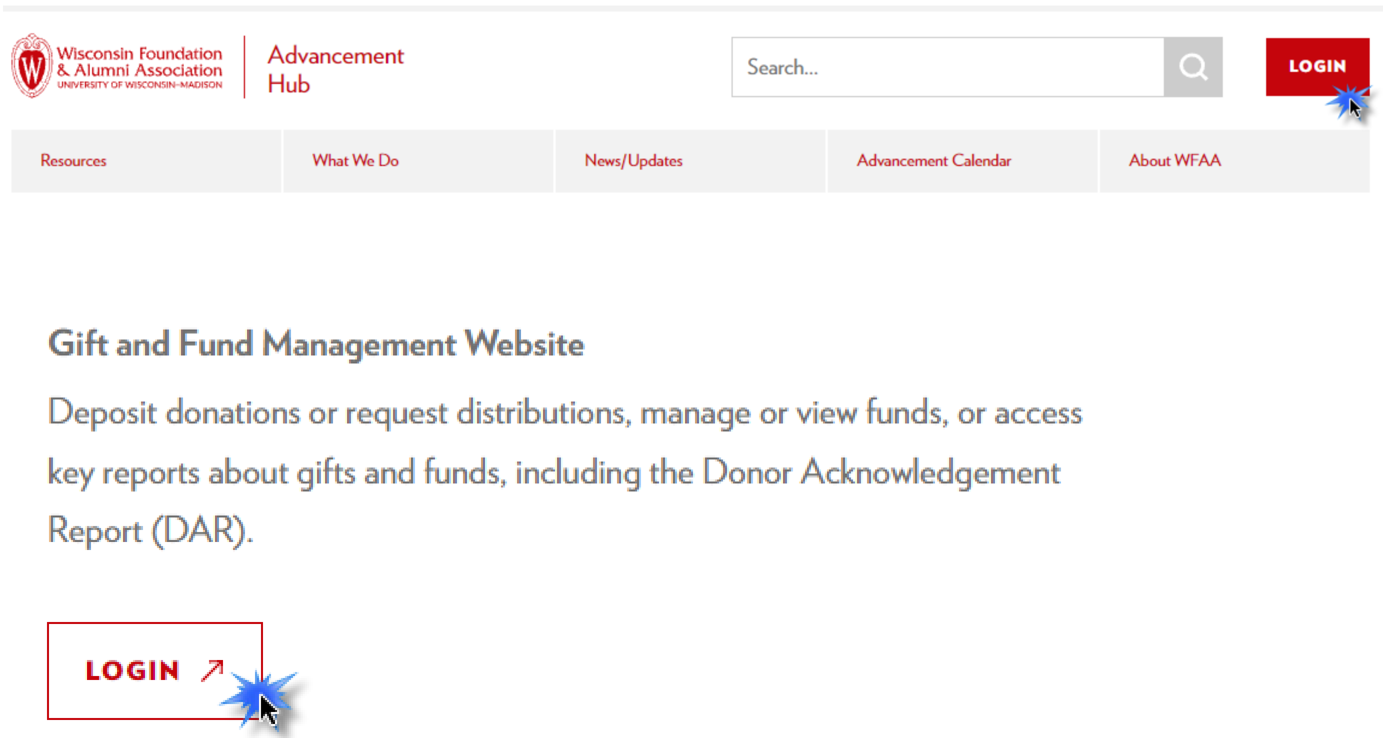
A **campus unit administrator** (CUA) is a person in a school, college, or department who is responsible for submitting requests to add users to Wisconsin Foundation and Alumni Association (WFAA) business applications. The applications are ABE CRM and the Gift and Fund Management website (GFM).

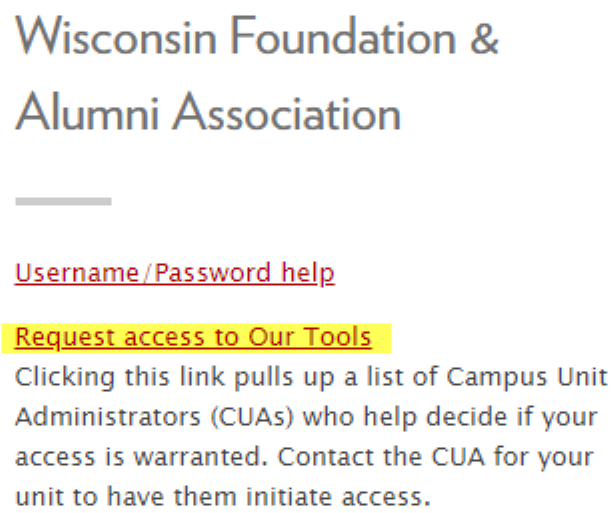
Unit administrators may submit new user requests, or requests to update access for a current user.

Unit Administrator List

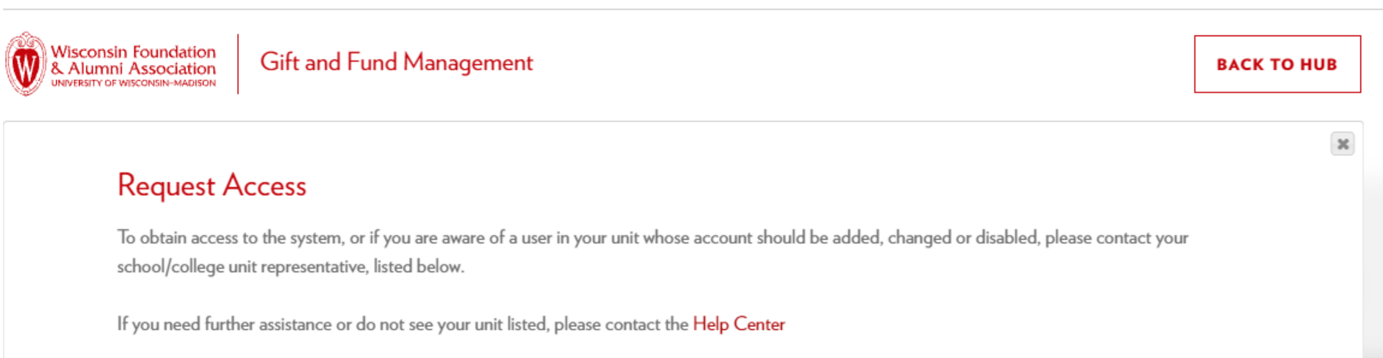
A list of CUAs is provided on the GFM login page, which is located in the Advancement Hub at the URL **uwadvancement.org**.

View the list by following the Request access to add, change or disable system users link:





CUAs are listed by their unit/school/college/department. A CUA may have the authority to request access to ABE CRM, GFM, or both applications:



If your name does not appear in this list, or your contact information is in error, please contact the WFAA Help Center (help@uwadvancement.org).

Requesting Access for a New User

Unit administrators request ABE CRM and/or GFM access for staff in their school, college, or department. Requests are submitted through the Advancement Resources website (uwadvancement.org).

This section discusses how to request access for a new user. If a current user's access needs to be changed (e.g. they are moving from one department to another, they require the ability to view additional CRM data), you will need to submit a change request. See the **Requesting Changes to User Access to Applications** section below.

Add User Access Process

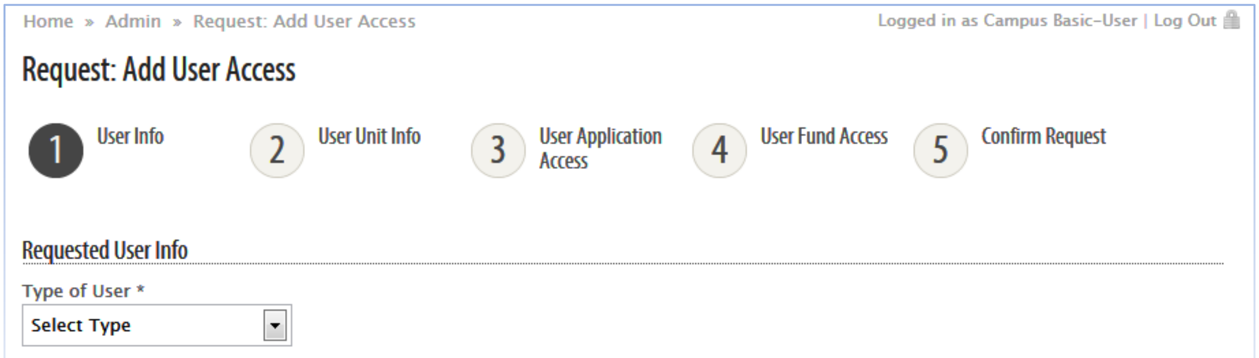
To begin the process to add a new user, log into the Advancement Hub/Gift and Fund Management website and use the menus to select **Admin → Add User Access Request**

At the top of the page is an ordered list of steps. Each step has its own specific data entry page.

You must complete a page before moving to the next step. A page is completed when you click the **Next** button. As you move through the pages, a **Previous** button will appear to provide a way to return to a page to review and/or edit its data.

If you exit the process before completing all steps, data you have entered **will not** be saved.

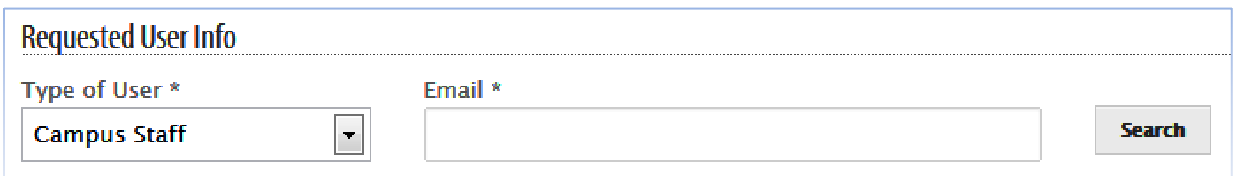
Add User Access - User Info



This page initially prompts you to specify the type of user:

- **Campus Staff** indicates the user is employed by UW-Madison.
- **Other** indicates the user is not Campus staff.

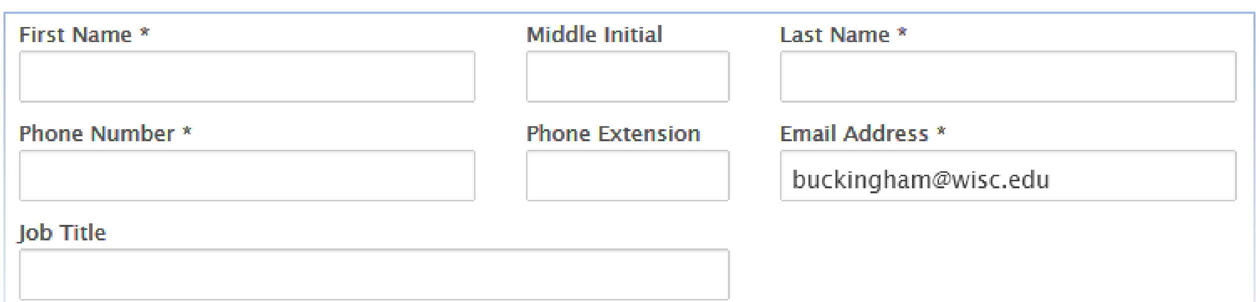
Make your selection to display the Email field:



Enter the user's email address, then click the **Search** button.

If the user already has an account, you will receive a message that they are "already registered in our system." Registered users are handled by a change request. (See the **Requesting Changes to User Access to Applications** section below.)

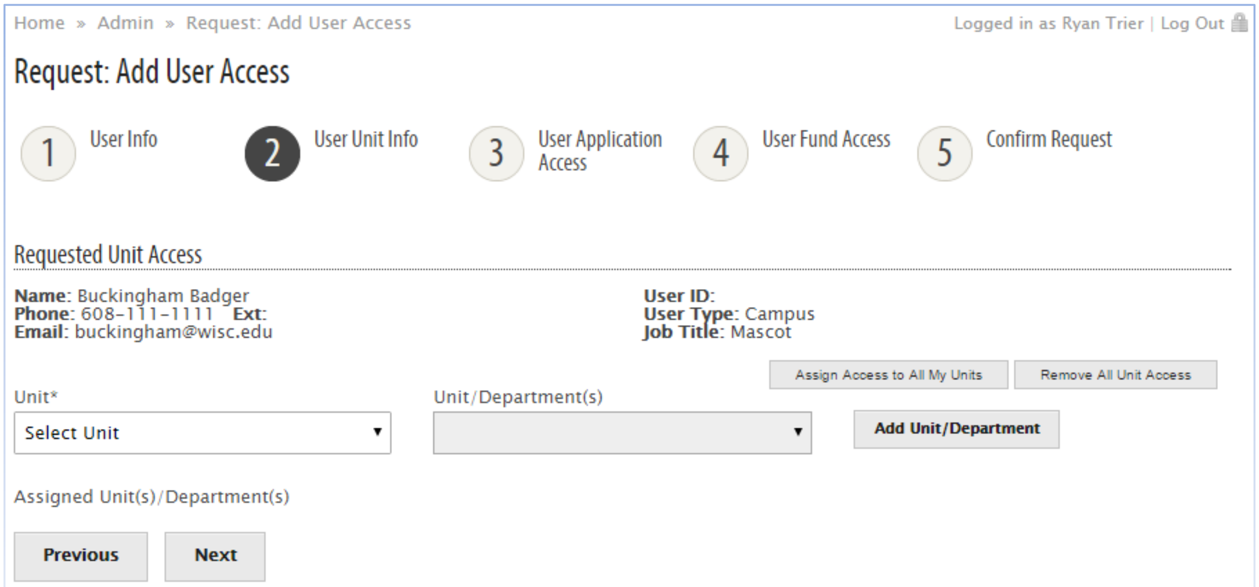
If the user is new, you are instructed to proceed. A set of data entry fields appear:



Data must be entered in the asterisked fields.

(When requesting access for a non-campus user, an additional **Specify Reason for Other** field is shown. Use the field to provide a reason you are requesting access for this user.)

Add User Access - User Unit Info



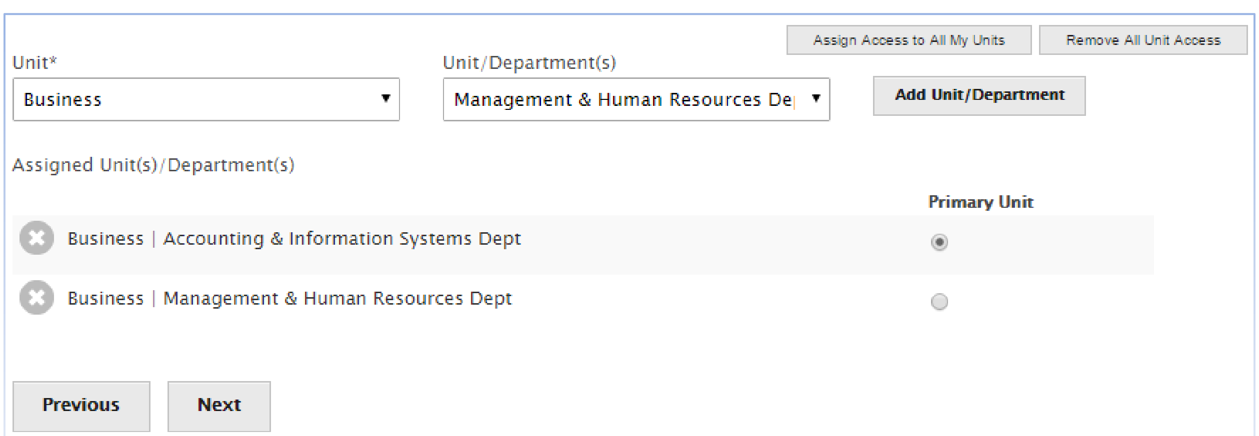
On this page, user information from the previous step is displayed. Below this data is an area where you indicate the new user's unit and department assignments. The assignments are used to define which funds and fund information (fund report data, check requests, deposit requests) the user may access.

You may only request access for your own units and departments.

To request access to <u>every</u> unit/department that you are assigned to, click **Assign Access to All My Units**.

To select a <u>particular</u> unit/department, use the **Unit** drop-down field. After a unit is selected, the Unit/Departments(s) field displays a list of departments. After selecting a unit and department (be careful – the choice of 'All Departments' is the default!), click the **Add Unit/Department** button. Your choice is displayed in the **Assigned Unit(s)/Department(s)** list at the bottom of the page.

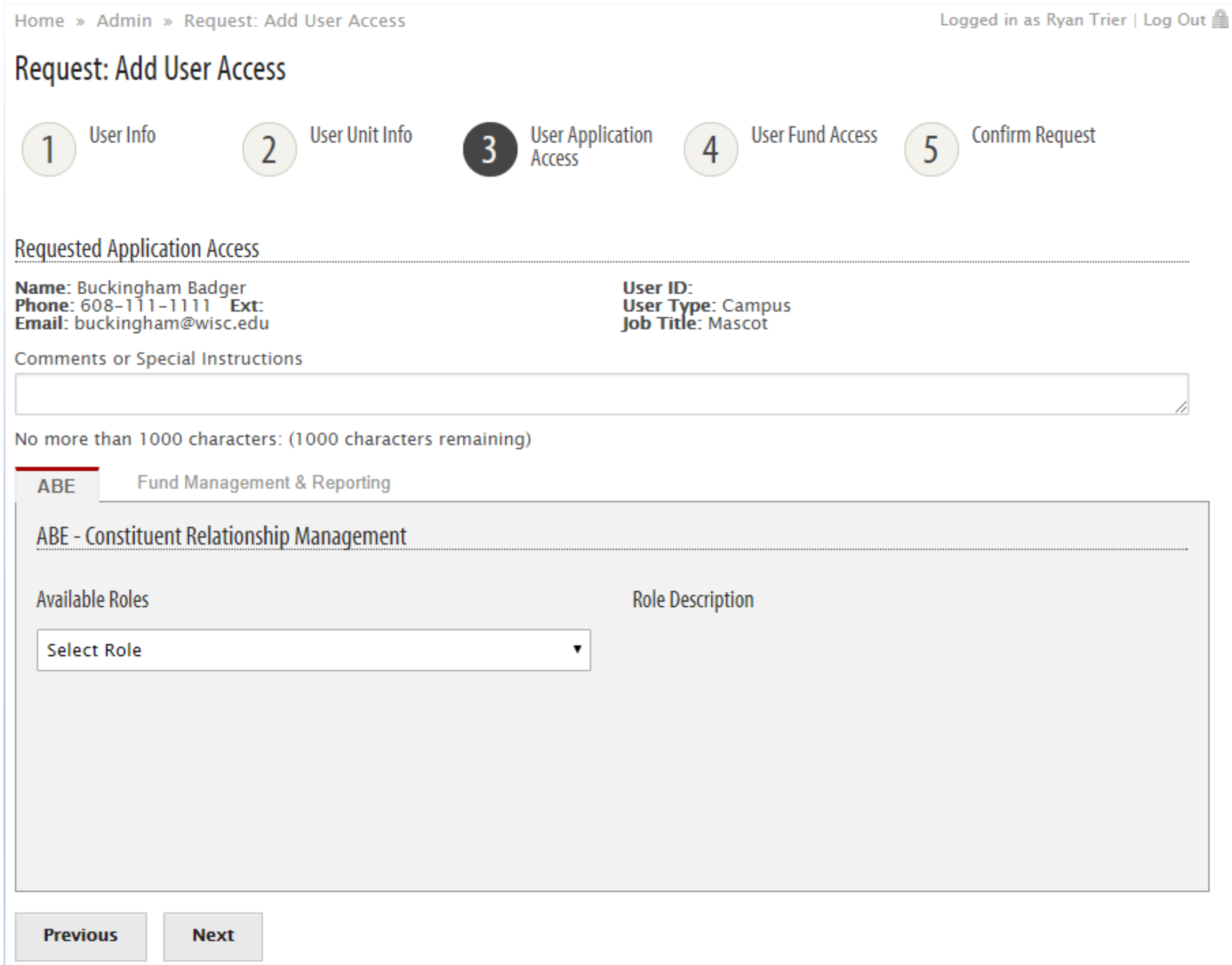
Multiple Unit/Department selections may be made. At least one selection <u>must</u> be made:



The **Primary Unit** assignment should reflect where the user can most likely be contacted.

If a Unit/Department selection was assigned in error, click the icon to remove it from the Assigned list. To clear the entire list of unit/department selections, click the **Remove all Unit Access** button.

Add User Access - User Application Access Overview



You've defined the new user and their unit and department assignments. On this page you designate which ABE CRM and GFM applications are available to them, and their capabilities within these applications.

Each application is represented by a separate tab. When you enter or select data within a tab, you indicate that the user has access to that application. Your selections define the user's level of access (i.e. what the user can do and what they can see).

If a comment or special instruction is warranted, enter it in the text area above the tabs. Examples would be to indicate a student user, a temporary employee, or a contractor.

ABE

Select an **Available Role** to define the level of **constituent** (alumni and donor) data access within ABE CRM. Some roles allow modification of ABE CRM data:

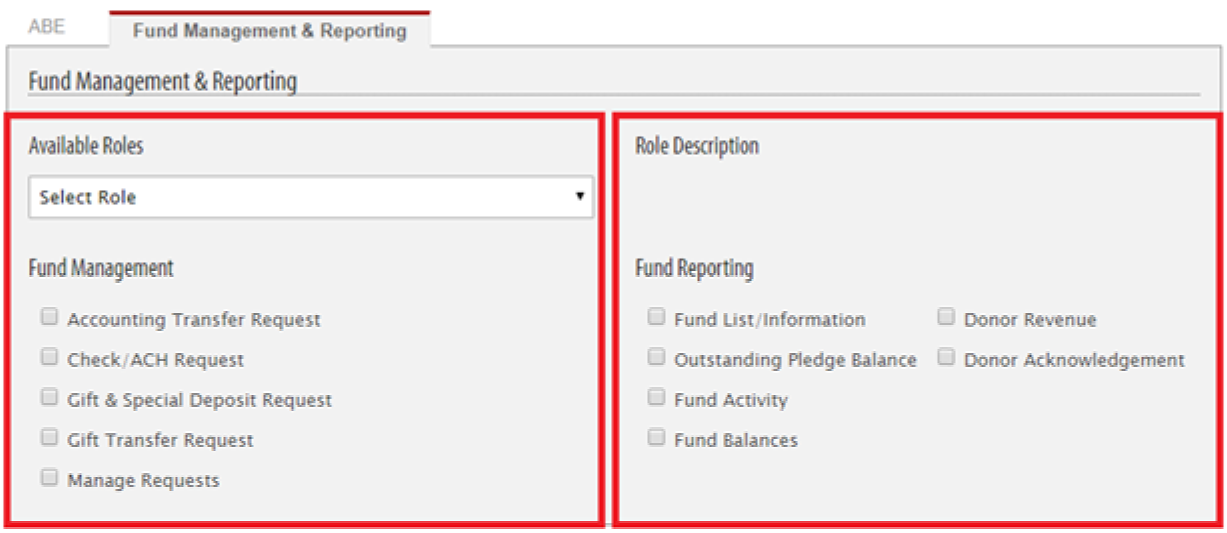
Demographic Information	Allows access to basic demographic and educational information in constituent records.
Revenue Information	Allows access to **demographic**, **educational**, and **gift** (revenue and recognition) information in constituent records.
Prospect and Revenue Information	Allows access to **demographic**, **educational**, and **gift** information in constituent records. Allows the ability to **view prospect plans** and **view/add/edit interactions**. Also allows the ability to **add a contact result on a pending plan step** when working with a WFAA development officer on a prospect plan

Note: A fourth role (**Prospect and Plan Manager**) is available, but is not provided in the drop-down list. This role applies to users who have development responsibility in their campus unit, and will carry a portfolio of donor prospects. Additional authorization (and extended training) is required for this role because of the increased support needed from WFAA resources to assist these users.

If you wish to request this level of access for a campus user, please do so by emailing your request to help@uwadvancement.org).

Fund Management & Reporting

On this tab, there are two columns of fields:



Fund Management *Fund Reporting*

The fields on the left are used to define the user's **Fund Management** configuration:

- The **Role** describes the **scope** of what may be done.
- The checkboxes define what the user can do within that scope.

Select an **Available Role** to define how the user may manage **check and deposit requests**:

- **Basic** – The user may add, edit, and view their requests.
- **Unit** – The user may add, edit, and view their requests and requests from users in their assigned unit(s).

After selecting a Role, select the appropriate **Fund Management** checkboxes.

Fund Reporting

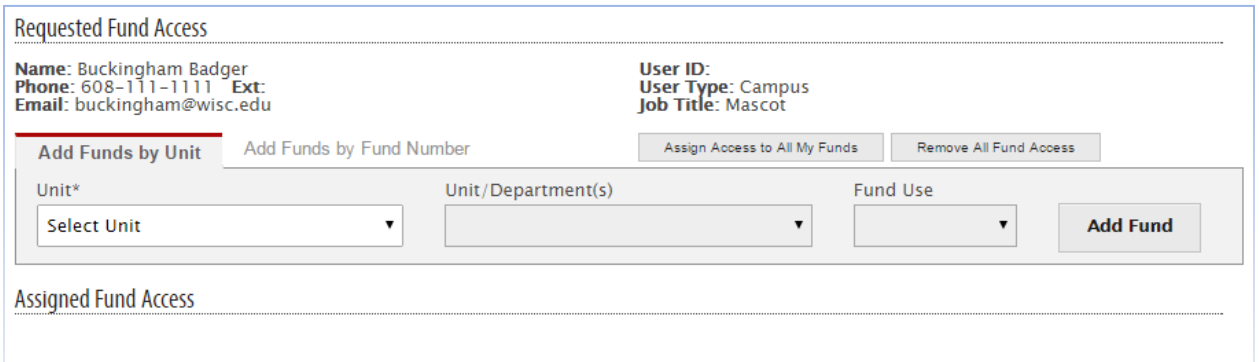
Fund Reporting capabilities for the user are chosen on the right. If the user should have access to fund information and fund reports, select the appropriate checkboxes in the **Fund Reporting** area. At a minimum, you should select **Fund List/Information**. (Functionality represented by the other checkboxes is dependent upon this.)

Note that the *Donor Acknowledgement Report* is a special case. To use the report to its fullest, the user will be granted ABE CRM Revenue Information access.

Add User Access - User Fund Access

This tab is only available when a selection has been made in the **Fund Management & Reporting** tab found in the User Application Access step. Here you specify the funds the user will be able to access with the capabilities defined by the previous step.

Entries can be made on both the **Add Funds by Unit** and **Add Funds by Fund Number** tabs:



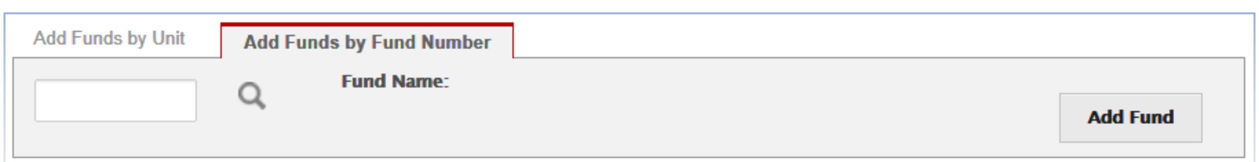
Multiple entries may be made, and each will display in the **Assigned Fund Access** area at the bottom of the page. Use the **Assign Access to All My Funds** button to quickly select all funds available to you. Use the **Remove All Fund Access** buttons to clear the list of selections.

Add Funds by Unit

On the **Add Funds by Unit** tab, you must choose a Unit. After selecting a Unit, the other fields will be available. Use these fields to narrow which of the unit's funds the user may access.

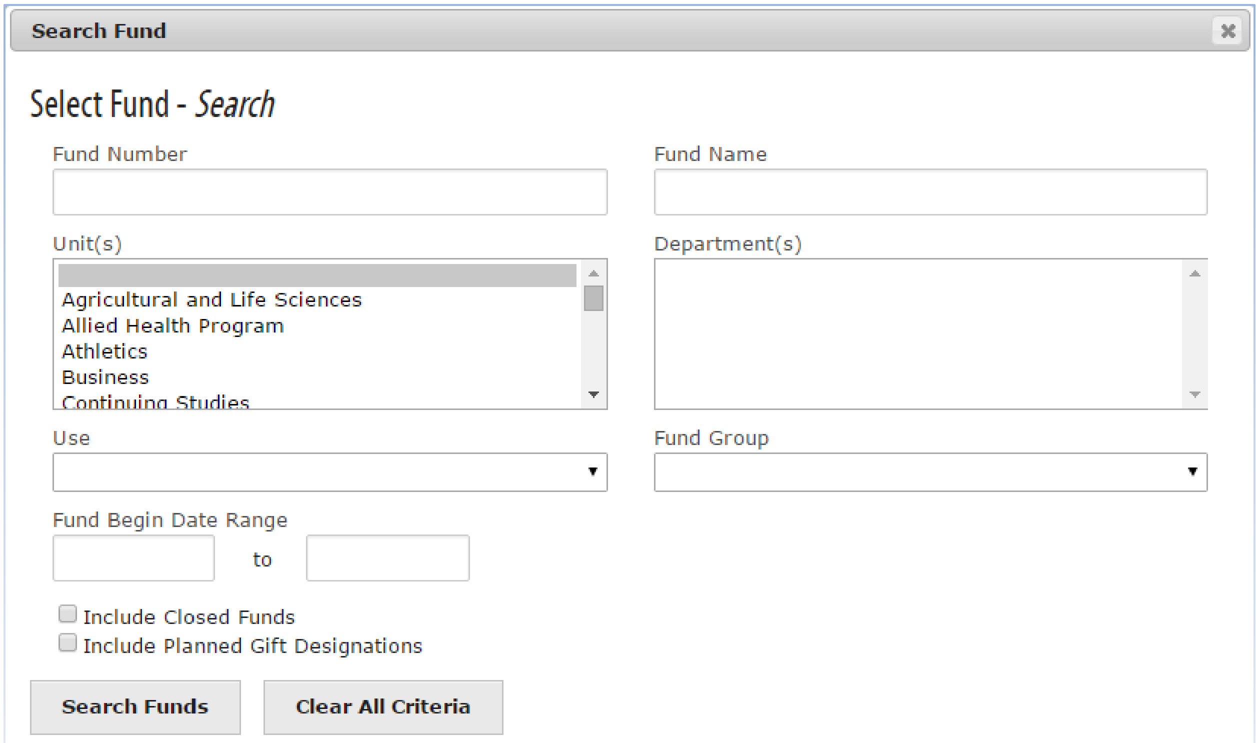
After making your selections, use the **Add Fund** button to save your entry in the **Assigned Fund Access** list.

Add Funds by Fund Number



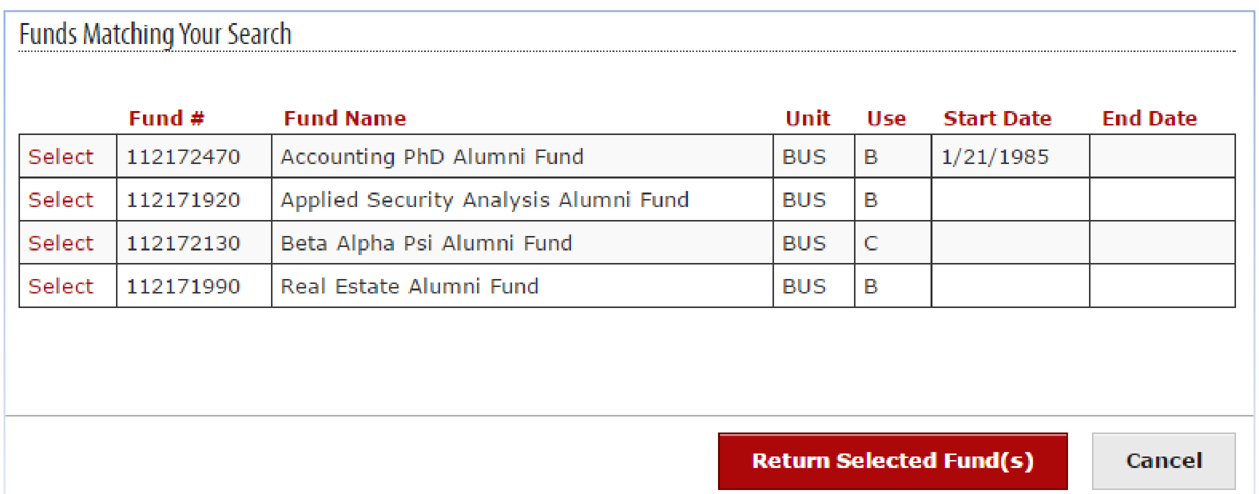
Enter the number of the fund in the data entry field and click the **Add Fund** button to save your entry in the **Assigned Fund Access** list.

If you do not have the fund number at hand, click the search icon. Clicking the icon will display a popup where you may search for funds by number or name:

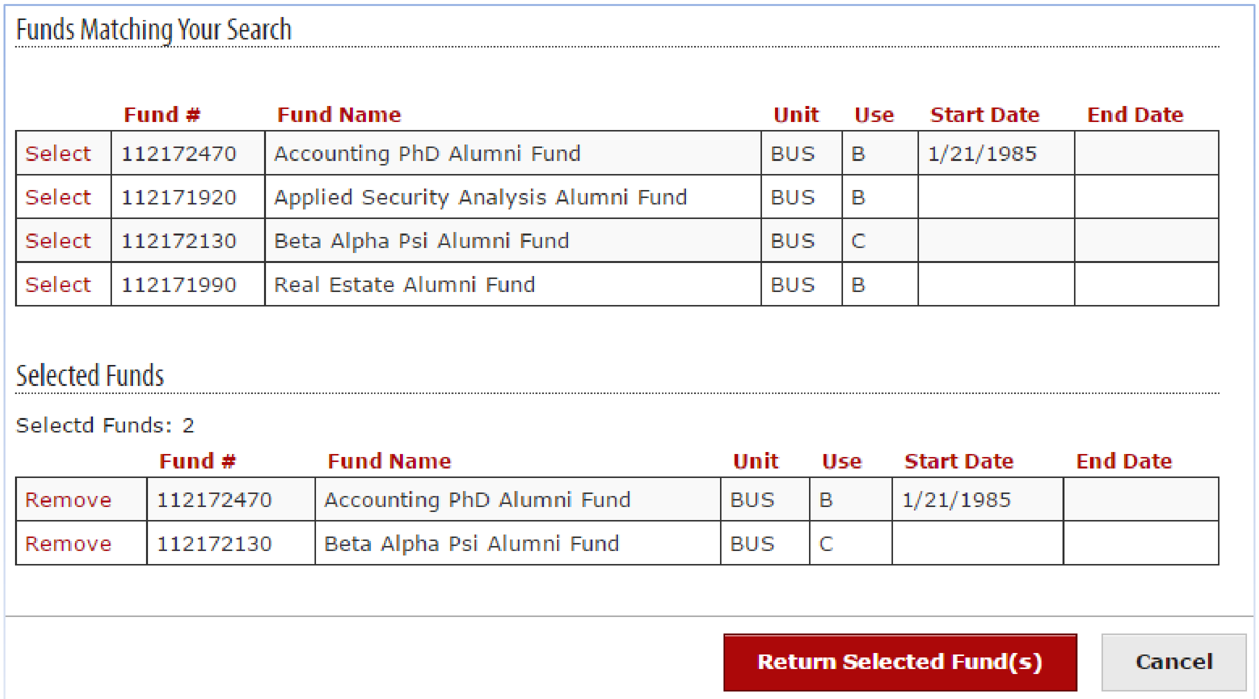


If you supply a Fund Number or Fund Name, a match will be found if your entry matches *any* part of the number or name. For example, entering a number of **333** will match funds 11217**333**8, 1121**333**04, etc. Entering a name of **Alumni** will find every fund with “Alumni” in its title.

After supplying your search criteria, click the **Search Funds** button to display a list of matching funds at the bottom of the popup:



Use the link in the first column to select a fund and display it in a Selected Funds list (which will appear at the bottom of the popup):



Funds Matching Your Search

	Fund #	Fund Name	Unit	Use	Start Date	End Date
Select	112172470	Accounting PhD Alumni Fund	BUS	B	1/21/1985	
Select	112171920	Applied Security Analysis Alumni Fund	BUS	B		
Select	112172130	Beta Alpha Psi Alumni Fund	BUS	C		
Select	112171990	Real Estate Alumni Fund	BUS	B		

Selected Funds

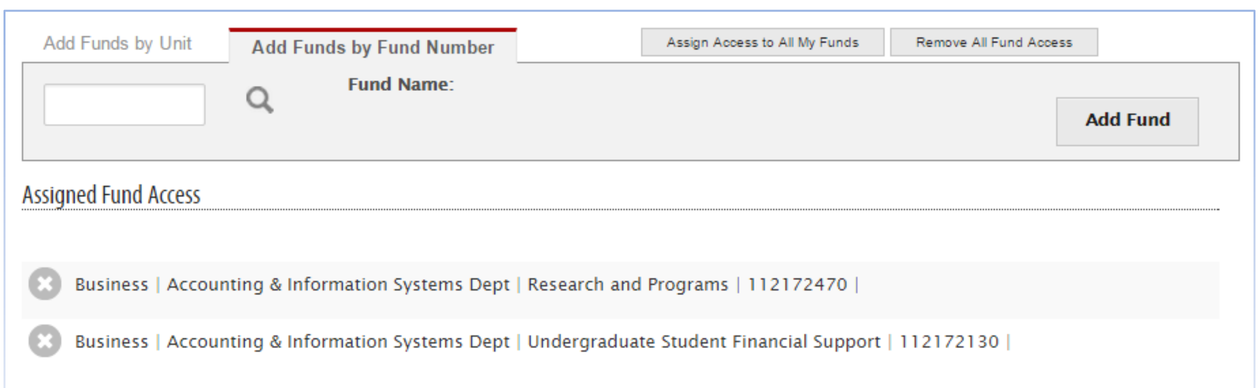
Selectd Funds: 2

	Fund #	Fund Name	Unit	Use	Start Date	End Date
Remove	112172470	Accounting PhD Alumni Fund	BUS	B	1/21/1985	
Remove	112172130	Beta Alpha Psi Alumni Fund	BUS	C		

Return Selected Fund(s) Cancel

If a fund was selected in error, click its corresponding Remove link.

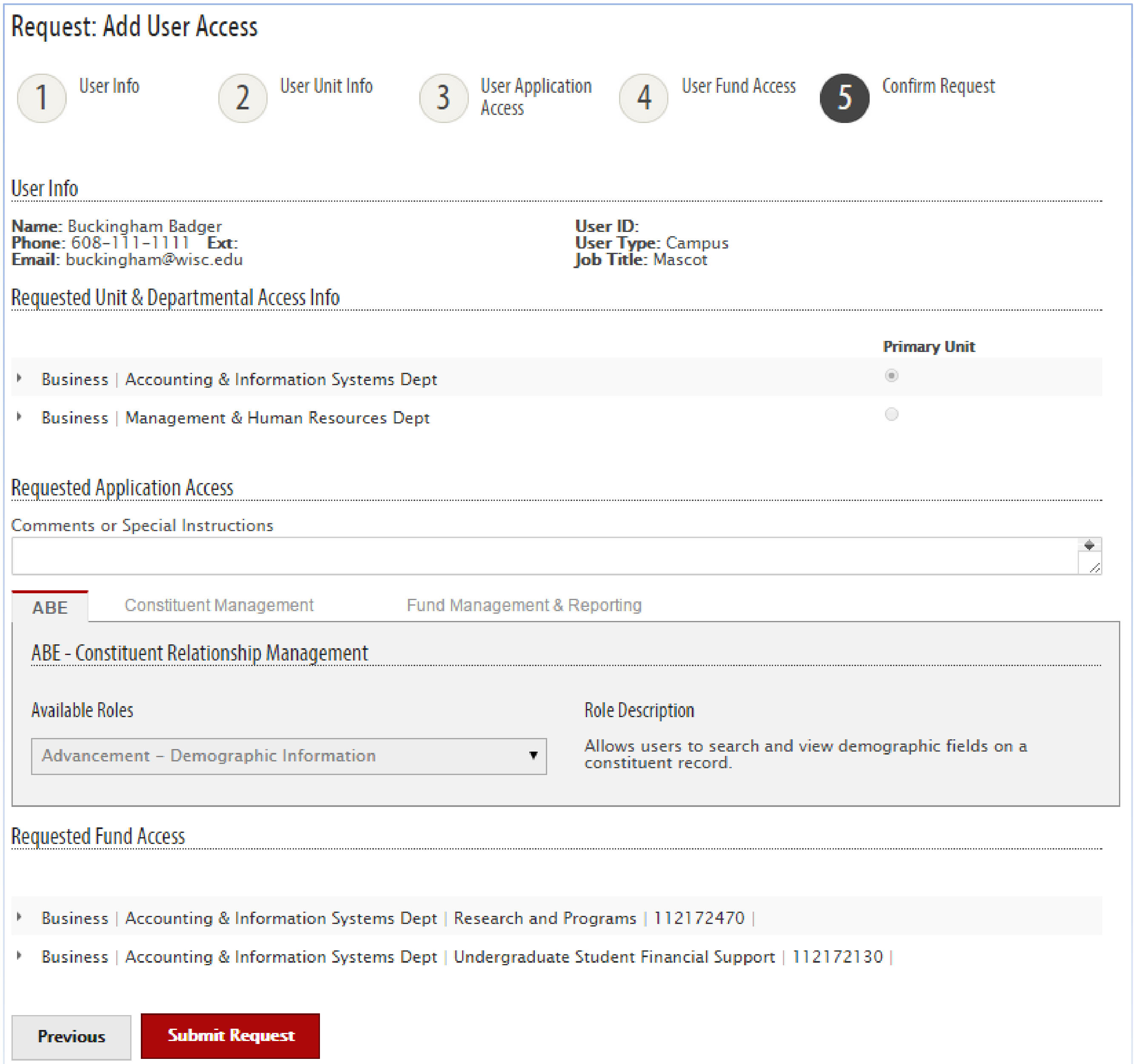
After selecting funds, click the **Return Selected Fund(s)** button to display them on the User Fund Access page. When it is displayed, click the **Add Fund** button to save your entry in the **Assigned Fund Access** list:



If a fund was added in error, click the icon to remove it from the Assigned Fund Access list.

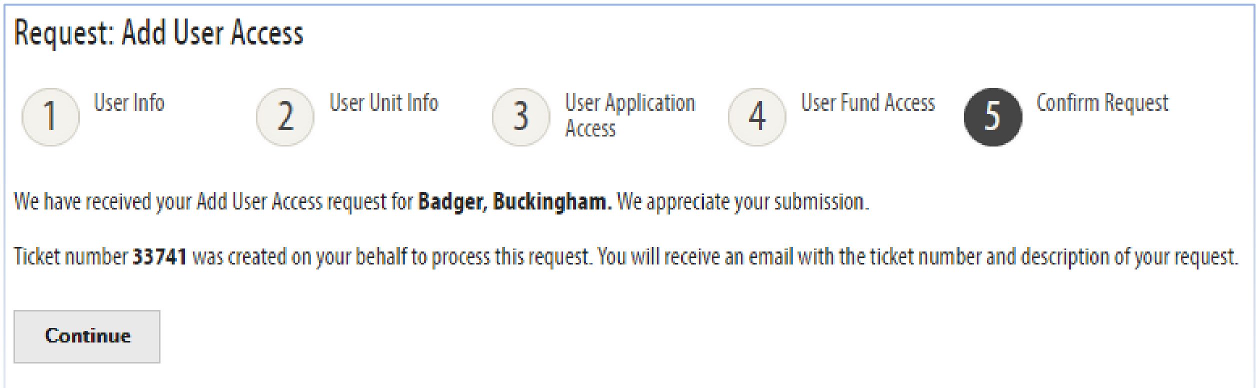
Note: If you click attempt to add a fund and are shown a popup with the message "Adding this would result in a duplication of fund access", the likely reason is that you have already added funds by unit and this fund is part of an existing unit/department combination.

Add User Access - Confirm Request



This is a display-only page where request information may be reviewed. If any errors or omissions are found, use the **Previous** button to revisit a data entry page and make corrections.

If all data is in order, click the **Submit Request** button. This will pass the request information to Advancement Resources staff who will evaluate and process the request. A "ticket" number will be assigned to the request and will display:

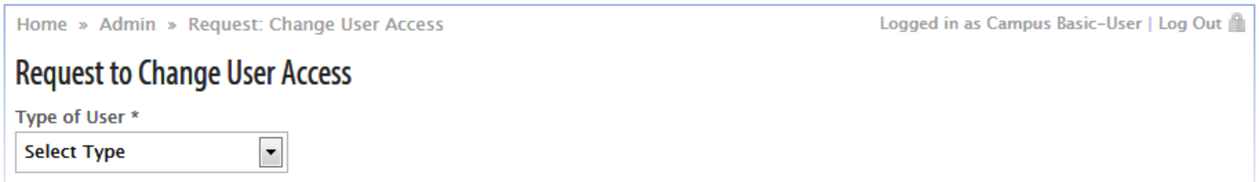


You will also receive an email confirming your request, and will receive another when your request has been processed.

Requesting Changes to User Access to Applications

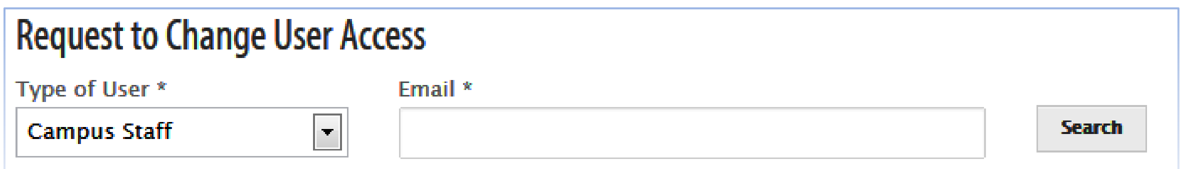
Unit administrators may request ABE CRM and/or Gift and Fund Management (GFM) application access changes for staff in their unit. These requests are submitted through the Advancement Hub website.

To begin the process, log into the GFM website through the Advancement Hub (or GFM bookmark) and use the menus to select **Admin → Change User Access Request**

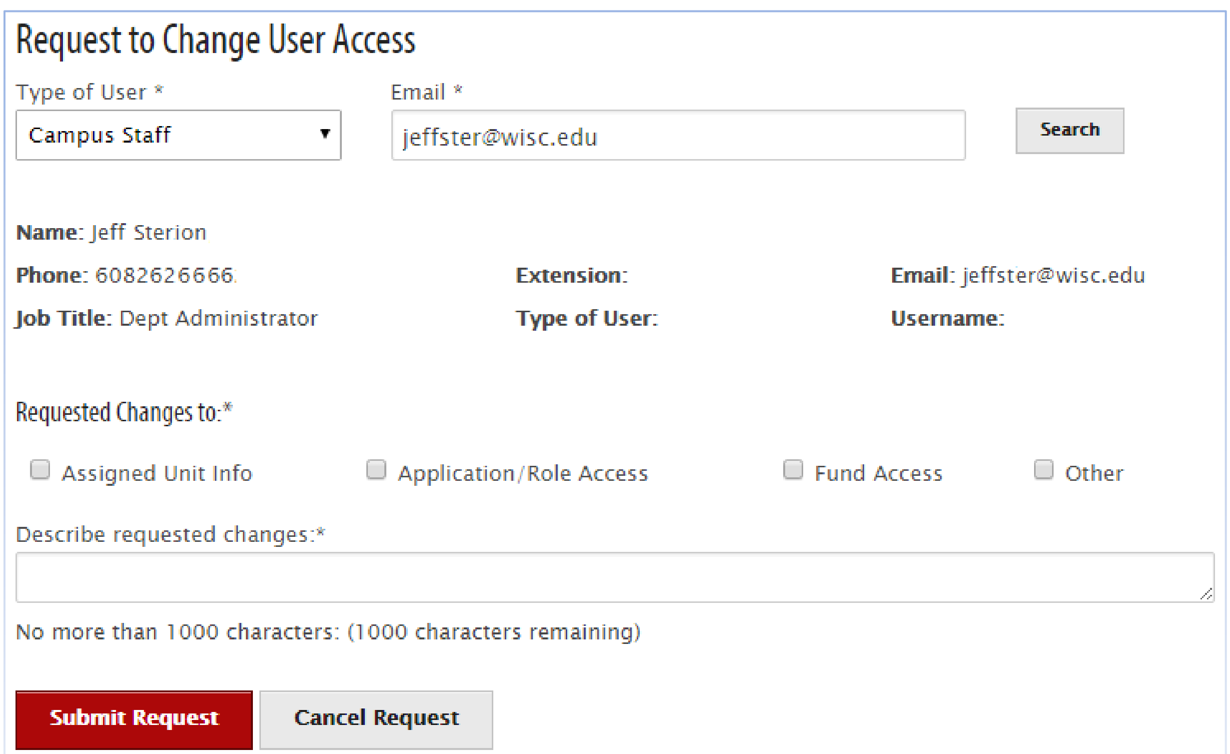


This page initially prompts you to specify the type of user. The **Type of User** field supplies two choices: **Campus Staff** indicates the user is employed by the UW-Madison, **Other** indicates the user is not Campus staff.

After selecting the type of user, you will be prompted to supply their email address:



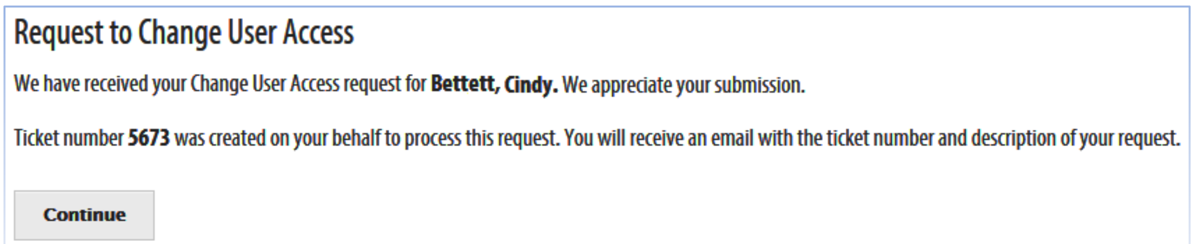
Supply the address and click the **Search** button to display the user's information and some data entry fields:



Use the checkboxes to indicate which settings and applications are subject to changes of access.

In the text field beneath the checkboxes, **provide a detailed description of the requested changes** (e.g. which Unit/Role/Fund to add or delete). **Be as thorough as possible.**

After selecting one or more checkboxes and providing a thorough explanation of the requested changes, click the **Submit Request** button. This will pass the information to Advancement Resources staff who will evaluate and process the request. A "ticket" number will be assigned and will display in a confirmation message:

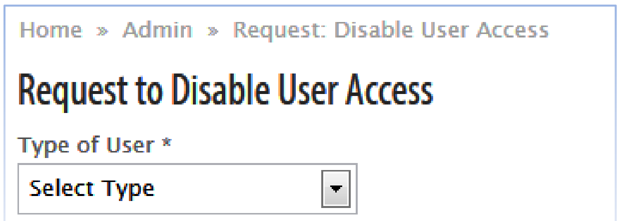


You will also receive an email confirming your request, and will receive another when your request has been processed.

Disabling User Access to Applications

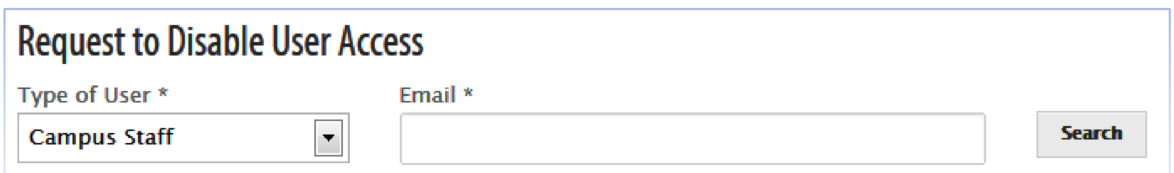
Unit administrators may request that staff in their unit be prevented from accessing the ABE CRM, GFM fund information, or Advancement Resources applications. These requests are made through the Advancement Hub/Gift and Fund Management (GFM) website.

To begin the process, log into the GFM site through the Advancement Hub (or GFM bookmark) and use the menus to select **Admin → Disable User Access Request**

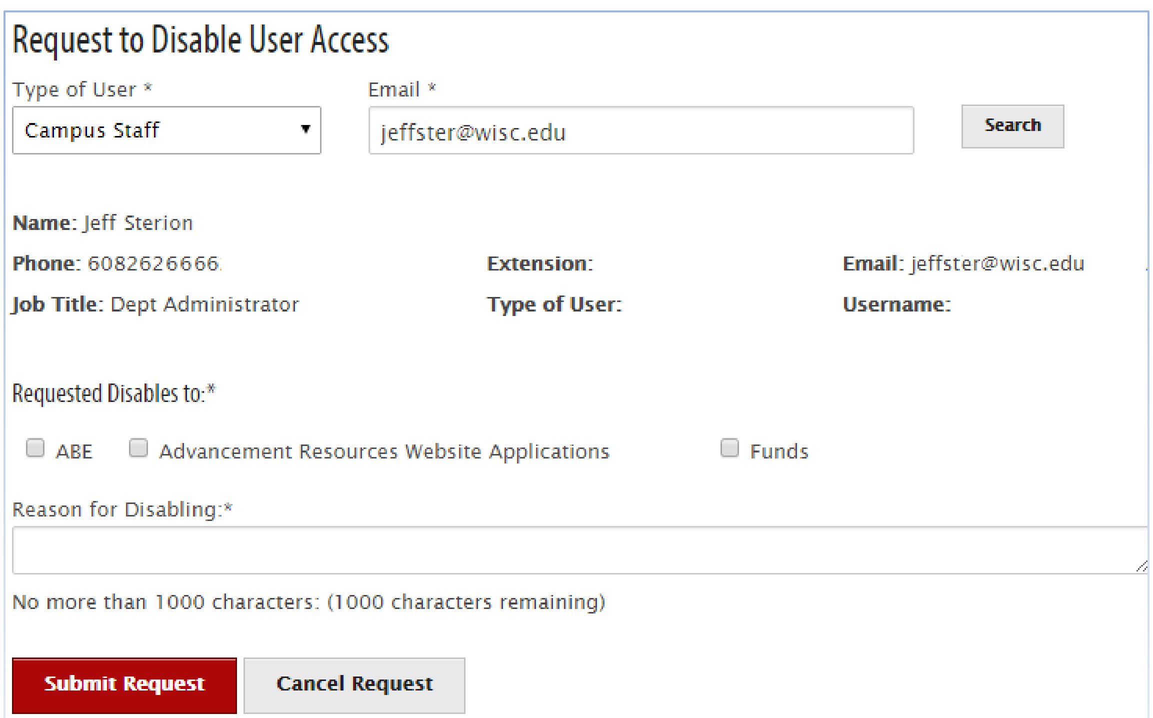


This page initially prompts you to specify the type of user. The **Type of User** field supplies two choices: **Campus Staff** indicates the user is employed by the UW-Madison, **Other** indicates the user is not Campus staff.

After selecting the type of user, you will be prompted to supply their email address:



Supply the address and click the **Search** button to display the user's information and some data entry fields:



Use the checkboxes to indicate which applications and data should not be available to the user.

In the text field beneath the checkboxes, provide a detailed description of the reason for disabling the user's access. Be as thorough as possible.

After selecting one or more checkboxes and providing a thorough explanation, click the **Submit Request** button. This will pass the information to Advancement Resources staff who will evaluate and process the request.

A "ticket" number will be assigned and will display in a confirmation message. You will also receive an email confirming your request, and will receive another when your request has been processed.

Viewing User Access Requests

You may view ABE CRM or Advancement Resources access requests by selecting the **Admin →**
View User Access Request Tickets menu item. A table of requests is displayed:

User Access Request Tickets

☐ Show Closed

Ticket #	Last Name	First Name	Unit	Status	Submitted By	Request Access
3929	Peck	Amanda	BUS	Pending	Ramaker, Morgan	View
3857	Ace	Frank	WAA	Pending	Krogulski, Shaun	View
3856	Hughes	Craig	WAA	Pending	Krogulski, Shaun	View

1 2

Only active (unprocessed) requests are shown. Click the **Show Closed** checkbox to include requests that have already been processed.

Click the View link to display the request (similar to the confirmation page described earlier).