University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

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Advancement [1]

This page provides resources and training information specific to Advancement staff and users of Advance Web.

Advancement Support and Resources

- Advancement Instructor Led Training Schedule [2]
- Getting Started in Advancement [3]
- Introduction to Fundraising [4]
- Fundraising Glossary [5]
- Guide to Endowed Funds [6]

Advance Web - Required Training and Access Request

You must complete the *Advance Web Overview, Navigation, and Reports* online course in SkillSoft before requesting or receiving access to Advance Web. When you have completed the course, please complete the request form for your campus, listed below, and forward it for processing as instructed on the form.

1. **Complete Required Advance Web Training:** Instructions for taking course [7]
2. **Request access to Advance Web:** Boulder [8] I Denver [9] I Anschutz [10] I Colorado Springs [11] I System [12]

Advance Web Donor Database

Click a **"Demo"** link to view how a task is performed, or click a **"Procedure"** link for a step-by-step instruction sheet you can print. **Demo links require Internet Explorer.**

- Creating a Contact Report: Demo [13] I Procedure [14] I Spell Checking Procedure [15]
- Creating a Note or Task (Notes define strategies and Tasks define Prospect Next Steps): Demo [16] I Note Procedure [17] I Task Procedure [18] I Close Task Procedure [19]
- Sharing Credit: Demo [20] I Procedure [21]
- Creating a Clipboard (Saved Entities): Demo [22] I Procedure [23]
- Maintaining the CRA: Demo [24] I Procedure [25]
- Pulling Endowment Status Reports: Demo [26] I Procedure [27]
- Creating a TN in Advance: Demo [28] I Procedure [29]

Brown Bag PowerPoint Presentations

- Consistent Fundraiser Management [30]
- High-Quality Discovery Calls [31]
- Strategic Contact Reports and Next Steps [32]
- Blue Ocean Philanthropy [33]

Attachments:
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Groups audience:
Employee Services

Source URL: http://www.cu.edu/employee-services/skillsoft/advancement

Links:
[1] http://www.cu.edu/employee-services/skillsoft/advancement
[2] http://www.cu.edu/sites/default/files/2015AdvTrainingSchedule_1.pdf
[3] http://www.cu.edu/sites/default/files/Getting_started_in_advancement.pdf
[4] http://www.cu.edu/sites/default/files/Fundraising.pdf
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