



**Advancement Orientation—facilitated monthly**

Laura Siedzick ([laura.siedzick@cu.edu](mailto:laura.siedzick@cu.edu)) contacts managers who have new employees scheduled to start to determine the best date for schedules. This orientation is specific to Advancement and is facilitated at the Broomfield Advancement Office, located at 10901 West 120th Ave., Suite 200. It may also be held at 1800 Grant, if needed.

**Advancement Strategy and Reporting Orientations—2<sup>nd</sup> Tuesday of every month**

Learn how these groups support you as you build your portfolio, plan next steps, and run reports out of Advance Web.

- Advancement Strategy Orientation—Sara Wuorinen, 9:00-10:30 Broomfield Advancement Office Training Room
- Reporting Orientation—Jean Camber, 10:45-Noon Broomfield Advancement Office Training Room
  - September 8
  - October 13
  - November 10
  - December 8

**Gift Planning and Leadership Giving Orientation—Quarterly**

- October 6, 10:00-11:30, Broomfield Advancement Office Training Room

**CU Foundation Financial Edge**

Financial Edge manages the release of funds to the university. Learn about account structure, gift transfer processes, endowment accounting, and reports. Facilitated by Scott Dunn, CU Foundation.

1800 Grant St., Rm 256, 1:30-4:00	Broomfield Advancement Office, 1:30-4:00
<ul style="list-style-type: none"> <li>• August 26</li> <li>• October 6</li> <li>• December 9</li> </ul>	<ul style="list-style-type: none"> <li>• September 17</li> <li>• November 5</li> </ul>

**Advance Web—Online via SkillSoft (see instructions below)**

- Advance Web Overview, Navigation, and Reports
- Gift Agreements
- Gift Handling (creating transmittal numbers in Advance)

**Advance Web—Reports**

- Entity Donor/Alumni Giving & Entity Degree/Alumni Reports—Jean Camber, 8:30-10:00, Broomfield
- Open Session/Bring Your Reports Questions—Jean Camber, 10:15-11:45, Immediately follows Alumni Reports
  - September 30
  - October 28
  - November 18
  - December 16

**Advance Web Online Demonstrations**

Visit <http://www.cu.edu/employee-services/eld/skillsoft/advancement> for procedures and demos of using Advance. Learn how to create contact reports, strategies, next step, and clipboards.

**Accessing SkillSoft to Launch Courses and Enroll in Instructor Led Training:**

1. Log on to the University portal (<http://my.cu.edu>).
2. From the Resources page, click **Training**.
3. Click **Start SkillSoft**.
  - Launch online courses:
    - a. Expand your campus folder.
    - b. Expand the **Advancement** folder.
    - c. Hover (hold your mouse pointer) over a course title and click **[Launch]**.
  - Enroll in Instructor Led Training sessions:
    - d. Expand the **CU Instructor Led Training** folder.
    - e. For the sessions listed in this document, expand the **CU Advancement** folder.
    - f. Hover over the course name and click **[Show Details]**.
    - g. Expand **Sessions(n)** for a list of scheduled sessions. If  $n=0$ , there are no sessions scheduled.
    - h. Hover over a session and click **[Enroll]**. The system sends you an Outlook invitation.