



## Getting Started in Advancement

Welcome to the University of Colorado Office of Advancement!

This document contains information to help you find training information and support for the following tasks:

- Taking *Advance Web Overview, Navigation and Reports* online course (**Required for Advance access**). Depending on your campus location, you may have additional required online training to complete, as described on page 2.
- Enrolling in upcoming functional orientations for new advancement staff
- Taking and enrolling in other courses you may need
- Logging in to Advance Web
- Getting Help

### Log In to SkillSoft for **Required** Online Training

SkillSoft is the university's learning management system that provides you access to online courses, enrollment into instructor-led training, and much more. Take the *Advance Web Overview, Navigation, and Reports* course to get familiar with navigation tools and reporting techniques in Advance Web. This course is required before you can request access or access Advance Web.

To access SkillSoft and launch the Advance Web overview course:

1. Sign in to the University of Colorado portal.
2. From the navigation menu on the Resources page, click **Training**.
3. Click **Start SkillSoft**.
4. Select your campus folder.
5. Expand **Advancement**.
6. Point/hover over **CU: Advance Web Overview, Navigation and Reports** and click **[Launch]**.

### More Advance Web

Visit <http://www.cu.edu/employee-services/eld/skillsoft/advancement> for online demonstrations of using Advance, including creating contact reports, creating strategies and tasks for prospect next steps, creating clipboards and more. You will also find step-by-step procedures for these tasks that you can print.

### Enroll in Upcoming Functional Orientations through SkillSoft

Several functional orientations are held at the Advancement office in Broomfield. These orientations help you understand how centralized teams in Advancement operations work with you in your fundraising efforts.

You can enroll in instructor-led courses through SkillSoft:

1. Sign in to the University of Colorado portal.
2. From the navigation menu on the left, click **Training**.
3. Click **Start SkillSoft**.
4. Expand the **CU Instructor Led Training** folder.
5. Expand the **CU Advancement** folder.
6. Hover over a course name and click **[Show Details]** to display information about the course.
7. Expand **Sessions(n)**, at the bottom of the details. A list of schedules sessions appears.
8. Expand a session for more details, or hover over a session you would like to attend and click **[Enroll]**. SkillSoft sends you an email from which you can accept an appointment into your Outlook calendar, or you can select a link that will let you go back and withdraw.

Courses you should take are listed on the following page.



### New Advancement Staff Should Complete the Following Training:

Course/Class:	Short Description:
Advance Web Overview, Navigation and Reports (online)	How to get around in Advance Web; <b>required</b> for access to Advance Web. Available online through SkillSoft.
HIPPA Regulations (online)	Health Insurance Portability and Accountability Act (HIPAA); <b>Required</b> for CU Anschutz, CU Denver and CU System
FERPA (online)	Family Educational Rights and Privacy Act; <b>Required</b> for CU-Boulder, CU Anschutz, CU Denver, UCCS, and System
Advancement Orientation	<a href="#">Laura Siedzick</a> schedules a monthly Advancement-specific orientation.
Gift Handling (online)	How to receive gifts, record them in Advance (create a Transmittal Number), and deposit through desktop transmittal. Available online through SkillSoft. <b>Required</b> for Development Assistants; recommended for all others
Gift Agreements (online)	While Gift Administration (GAD) is modifying the gift agreement process, this online course has been updated recently to reflect the current process.
Advancement Strategy Orientation	Learn about research, strategy, prospect management, and proposals.
Reporting Orientation	Learn about reports and getting support.
Gift Planning Orientation -Offered quarterly	How to include Planned Giving in your fundraising efforts. Planned Giving is currently revising its training.
Financial Edge (Accounting System) Hands-On Training	Accounting and reporting on endowments, investments, and other gift funds; transfers of gifts and income to CU. You may want to discuss with your manager when it may be appropriate to participate in this training.

### Other Courses You May Need to Complete

Depending on your role, you may need additional training as follows:

- **New Employee Orientation:** Depending on your campus, orientation may be online or in person.
  - Boulder, UCCS, and System—Orientation is online through SkillSoft.
  - Denver and Anschutz—Orientation is instructor led. Sign up online through the campus HR website.
- **Discrimination & Harassment:** Required for all employees and available online through SkillSoft. Versions vary by campus.
- **Fiscal Code of Ethics:** Required for most employees and available online through SkillSoft.
- **Information Security & Privacy:** Required for all employees and available online through SkillSoft.
- **Travel and Expense Reimbursement Training:** Ask your manager about what role you have and which Concur training is appropriate for your role. If you are not sure, contact HR for more information.
  - Concur - Booking Travel
  - Concur - Reconciling Pcard
  - Concur - Reconciling Travel
  - CU Travel and Travel Card
- **Performance Management:** If you manage classified staff, you're required to take a course on performance management. Depending on your campus, this training may be online or in person. Ask your manager or HR for more information.



## Log In to Advance Web Online

Advance Web is the university's donor database. Once you have access to Advance, you may want to log in and run the Available Reports listing or find additional information in the online help, also called Site Help.

1. Go to <https://advance.cufund.org>
2. Type your VPN credentials if prompted. If your computer was created with a CU Foundation image, you may not be prompted to enter credentials.
  - a. The foundation domain is cufis. Your credentials for this domain are: *cufis\fm<sup>l</sup>astna* - where *fm<sup>l</sup>astna* is your first initial, middle initial (if you provided one during hire), and last name up to eight characters total.  
**Note:** Other domains are as follows:
    - Boulder Campus: AD\<
    - Denver and Anschutz Campus: UNIVERSITY\<
    - System: AD\<
    - UCCS: UFP
  - b. Your Advance username is *fm<sup>l</sup>astna* as described above.
  - c. Your Advance password will be sent to you via a letter from UIS. If your account has been set up, your initial password is usually **Welcome1!** Enter this password and you will be prompted to create a new password.  
If you experience issues logging in to Advance, contact [Advancement.Reporting@cu.edu](mailto:Advancement.Reporting@cu.edu).
3. To run the Available Reports report, select it from the Advance Home page tree.
4. To access Site Help, click the Help icon from the main menu at the top of the page.

**Reminder:** Online demonstrations of how to use Advance are available at <http://www.cu.edu/employee-services/eld/skillssoft/advancement>.

### 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](#) | [Procedure](#) | [Spell Checking Procedure](#)
- Creating a Note or Task (Notes define strategies and Tasks define Prospect Next Steps): [Demo](#) | [Note Procedure](#) | [Task Procedure](#) | [Close Task Procedure](#)
- Sharing Credit: [Demo](#) | [Procedure](#)
- Creating a Clipboard (Saved Entities): [Demo](#) | [Procedure](#)
- Maintaining the CRA: [Demo](#) | [Procedure](#)
- Pulling Endowment Status Reports: [Demo](#) | [Procedure](#)
- Creating a TN in Advance: [Demo](#) | [Procedure](#)



## How to Get Help

- **Help from Support Teams:** Visit the CU Foundation intranet home page: <http://intranet.cufis.org/>. Depending on your computer setup and office location, you may need to use VPN to access the foundation intranet.
- **Information about Prospect Management and Development Support:** Visit the foundation intranet home page and click **General Information**. From this menu, select Prospect Management or Gift Administration. Other web pages may be out of date. Ask your manager or teammates about which pages of the CUF intranet they use. You can also email [Advancement.ProspectManagement@cu.edu](mailto:Advancement.ProspectManagement@cu.edu) with questions.
- **Help with Advance Web:** Email [Advancement.Reporting@cu.edu](mailto:Advancement.Reporting@cu.edu). You can also check the online help, called Site Help, for more information. Site Help is currently under construction, but much of the basic information is still helpful.
- **Help with Receiving and Recording Gifts:** Email [Processing@cufund.org](mailto:Processing@cufund.org).
- **Issues with your computer:** [Advancement.IT@cu.edu](mailto:Advancement.IT@cu.edu).
- **Campus Help Desks:**
  - **Boulder:** Email: [help@colorado.edu](mailto:help@colorado.edu) or phone: 303-735-Help
  - **Denver and Anschutz:** Email: [ucd-its-helpdesk@ucdenver.edu](mailto:ucd-its-helpdesk@ucdenver.edu) or phone: 303-724-Help
  - **Colorado Springs:** Email: [helpdesk@uccs.edu](mailto:helpdesk@uccs.edu) or phone 719-255-3536
  - **System (Grant and Broomfield offices):** [help@cu.edu](mailto:help@cu.edu) or phone: 303-860-Help
- **Questions about this document and onboarding:** [laura.siedzick@cu.edu](mailto:laura.siedzick@cu.edu)