

Employee Last Name: _____ Employee Start Date: _____

UC DAVIS

DEVELOPMENT AND ALUMNI RELATIONS

Training Acknowledgement for PMATS Access

Addendum to the Advance Security and Use Statement

Please return to:

Andrea Dickens
Prospect Management and Research
University Development Office
UC Davis Conference Center, 2nd Floor

All videos can be found here: http://ais.ucdavis.edu/training/systems_nonav/index.html

Prospect Management and Tracking System policy, definitions and “how-to” documents can be found on the Development Officer’s Toolkit: <https://dot.ucdavis.edu/>

<input type="checkbox"/> <i>Prerequisite for PMATS Access</i> ADVANCE INQUIRY ONLY: Security <ul style="list-style-type: none">• Advance Web Security Video Under AIS/Quick Start <ul style="list-style-type: none">• Videos 1 – 6 Under AIS/Bio Maintenance Videos <ul style="list-style-type: none">• Bio Maintenance #1: How to Do a “Less is best” Entity lookup	<input type="checkbox"/> CONTACT REPORT MAINTENANCE: <i>PMATS Inquiry Only training items, plus:</i> On Development Officer’s Toolkit PDF Contact Report Quick-Start PDF Contact Report Essentials PDF Contact Reports Rpt on Advance Web to Export CRs PDF Printing Full Text Contact Reports for Review Under AIS/Development Staff Videos <ul style="list-style-type: none">• Video 7
<input type="checkbox"/> PMATS INQUIRY ONLY: On Development Officer’s Toolkit PDF PMATS Policy, Guidelines and Key Concepts PDF DO Metrics - Planned Gifts Policy and Process (to include new planned gifts in DO’s metrics) PDF PMATS Definitions Under AIS/Development Staff Videos <ul style="list-style-type: none">• Videos 1 – 6	<input type="checkbox"/> PMATS PORTFOLIO MAINTENANCE: <i>PMATS Inquiry & Contact Report Items, plus:</i> On Development Officer’s Toolkit PDF DO Metrics Overview Report Instructions PDF Active MG Solicitations Report (pm-023) Instructions PDF Solicitation / Proposal Adding & Updating PDF Dropping Prospect Assignments Under AIS/Development Staff Videos <ul style="list-style-type: none">• Videos 8 – 13

Note: Additional training may be suggested or required as needed and appropriate.

I acknowledge that I have studied the above Advance training materials that pertain to my job function. I understand that I am responsible for all entries made thereunder.

Employee Signature: _____ Date: _____ Phone#: _____

Print Name: _____ Job Function: _____

I acknowledge that the above employee has studied the above Advance training materials that directly pertain to her/his job function. I authorize the appropriate security rights and profile be assigned to this employee in the AIS systems to perform his/her job function.

Supervisor’s Signature: _____ Date: _____ Phone#: _____

Print Name: _____ Dept/Unit: _____

PMATS Manager’s Signature: _____	Date: _____
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Advance Web Training Videos

<p>Quick Start Videos:</p> <ol style="list-style-type: none">1. Introduction to Advance Web and Advance Web Login2. Navigation in Advance Web3. Lookups Part One4. Lookups Part Two5. Entity Overview6. Advance Web Reports	<p>Bio Maintenance Videos:</p> <ol style="list-style-type: none">1. How To Do a "Less is Best" Entity Lookup2. How To Add A New Entity Record3. How To Add An Address4. How To Add A Telephone Number5. How To Add An E-Mail Address6. How To Add A Web Address7. How To Add An Alias and/or Nick Name8. How To Make A Primary Name Change
<p>Development Staff Videos:</p> <ol style="list-style-type: none">1. DO Home Page2. Quick Links3. Entity Overview Screen4. Prospect Overview Screen5. Proposal Overview Screen6. Left Hand Navigation Tree7. How to Create a Contact Report8. Add a Prospect to PMATS9. Update and Maintain a Prospect Record10. Add/Update RM or TM11. Add New Ask/Proposal12. Update and Maintain an Existing Ask13. Add/Update Solicitation Team	<p>Development Officer's Toolkit - PMATS Docs:</p> <p>Policy & Definitions</p> <ul style="list-style-type: none">○ PMATS Policy, Guidelines and Key Concepts○ DO Metrics - Planned Gifts Policy and Process (to include new planned gifts in DO's metrics)○ PMATS Definitions <p>Contact Reports</p> <ul style="list-style-type: none">○ Contact Report Quick-Start○ Contact Report Essentials○ Contact Reports Report on the Advance Web to Export Contact Reports○ Printing Full Text Contact Reports for Review <p>Metrics & Portfolio Management</p> <ul style="list-style-type: none">○ DO Metrics Overview Report Instructions○ Active MG Solicitations Report (pm-023) Instructions○ Solicitation / Proposal Adding & Updating○ Dropping Prospect Assignments