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FUND VIEW

Fund View collects donor-supported fund information from different data sources including *The Advancement System (TAS)*, Office of Financial Services, Office of Student Financial Aid and the University’s General Ledger.

A completed and signed copy of The Ohio State University Foundation Advancement System Fund View Permission Request form must be received by the Donor Relations & Stewardship department in The Ohio State University Foundation before access to The Advancement System will be granted.

Lesson Objectives

After you complete this lesson, you will be able to:

- Log in to The Advancement System
- Search for a fund
- Display Student Financial Aid information for a fund
- Submit a request to add a new fund
- Determine what gifts are in the 180-day hold for a fund
- Complete Fund View Edits
- Access the Gift Memo Support Report
- View the General Ledger Transfer Report
- Export the Multiple Fund CSV Report
Log In

Go to http://tas.osu.edu. To log in to TAS, you must enter your user name and password and then click OK.

Home Page

The Home page is the first page that displays when you log in to TAS.
Fund View

Fund View Search

To Search for a Fund:

1. Click on Fund View Search
2. Type the fund number into Fund Number field on Designation Fund View Search window
3. Check box if your search is for a closed fund
4. Click on Search
5. Select the fund in the Results list
6. Click on Select or click on the fund to display the fund page

Click on Fund View Search to open the Designation Fund View Search window.

NOTE: Fund View Search is also available from the Fundraising page.

Enter the six digit fund number in the Fund Number field on the Designation Fund View Search window. Click on Search to locate the fund.

Enter information into any of the other fields on the Designation Fund View Search window to locate a fund if you do not know the fund number.
NOTE: When searching for a closed fund, the box in front of Include Closed Funds must be checked prior to clicking on Search.

The search fields are capable of wild card searching. For example, if you enter only a 6 in the Fund Number field and click Search, all funds beginning with the number 6 are displayed under Results.

TAS limits the results displayed to 100. If the fund number that you are looking for is not displayed you must narrow your search to locate the fund number.

The Results for the fund search are displayed in the Results section of the Designation Fund View Search.

Click on Select to display the fund information screen or double click on the selected fund to display the screen. However, if the correct fund was not returned in the Results list, click on Clear and change/correct your search criteria before clicking Search.
**Fund View**

**Fund Number:** 303578

**Name:** TEBITL Alumni Scholarship - 303578  
**Description:** Scholarship funds for the OSU Marching Band  
**Public Name:** TEBITL Alumni Club Scholarship Fund  
**Reporting:** Scholarship funds for the OSU Marching Band  

<table>
<thead>
<tr>
<th>Fund Profile</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home Department:</strong></td>
<td>School of Music (D0265)</td>
<td>Department Org: School of Music (D0265)</td>
</tr>
<tr>
<td><strong>Endow/Current Use:</strong></td>
<td>Current Use</td>
<td>GL Fund Number: 303578</td>
</tr>
<tr>
<td><strong>Fund Purpose:</strong></td>
<td>Student Financial Aid</td>
<td>Foundation/University: University</td>
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<tr>
<td><strong>Hold for 180 Days:</strong></td>
<td>Yes</td>
<td>Start Date:</td>
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<tr>
<td><strong>Agreement/Plan:</strong></td>
<td></td>
<td>Fund Closed: No</td>
</tr>
</tbody>
</table>

**Development Activity**

- **Last activity Date:** 04/06/2012
- **Cash:** $559.00

**Gifts in 180 day hold (not in GL)**

- Gifts Held 6 Months: $230.00
- Gifts Held 5 Months: $30.00
- Gifts Held 4 Months: $290.00
- Gifts Held 3 Months: $30.00
- Gifts Held 2 Months: $80.00
- Gifts Held 1 Month: $30.00
- Gifts Current Month: $30.00

**General Ledger**

**General Ledger as of:** Updated within the past 24 hours

- **Fund Number:** 303578
- **Beginning Balance:** $5,012.22
- **Additions:** $665.00
- **Deductions:** ($4,500.00)
- **Liabilities:** $0.00
- **Non-Cash Assets:** $0.00
- **Cash Balance:** $1,177.22
- **Encum/Pre-Encum:** $0.00
- **Available Balance:** $1,177.22

**% of Inc. Committed:** 79.26%

**Student Financial Information**

**Stewardship**

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<th>Name</th>
<th>Relationship</th>
<th>Comment</th>
<th>End Date</th>
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**Administration Contact**

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
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</thead>
<tbody>
<tr>
<td>Bradley A. Harris</td>
<td>Sr. Fiscal Officer</td>
</tr>
<tr>
<td>Megan L. Koester</td>
<td>Sr. Fiscal Officer</td>
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</tbody>
</table>

**Categories & Tags**

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<th>Tags</th>
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</table>

**Report Dates:** 4/30/2012 3:42:00 PM  
**Page:** 1
Under the heading of Development Activity you can see the gifts that are in the 180-hold for the current use fund. Each dollar amount is a link that you can use to see the gifts that are being held.

Click on the dollar amount that is shown to the right of the heading Gifts Held 3 Months under the Development Activity heading.
The date, amount, name of the constituent, constituent’s lookup ID, application and the number of months that the gift has been held is listed along with a total $ amount for the period.

Click on Fund View under the Tasks heading on the Explorer bar to return to the Fund View screen.

Click on Student Financial Information link on the Fund View page to display Student Financial Aid information for the fund.
## Fund View

**Fund Number:** 303575

**Name:** TBG4D9L Alumni Scholarship - 303575

**Income Fund Number:** 303575

**Description:** Scholarship funds for the OSU Marching Band

**Public Name:** TBG4D9L Alumni Club Scholarship Fund

**Reporting:** Scholarship funds for the OSU Marching Band

### Student Financial Aid

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<tr>
<td>Name</td>
<td></td>
<td>Accepted: $1,000.00</td>
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<td>Hometown</td>
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<tr>
<td>FERPA</td>
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<td></td>
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<table>
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<th>College</th>
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<tr>
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<td>$0.00</td>
<td>$0.00</td>
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<tr>
<td>Autumn</td>
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<tr>
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<td>$0.00</td>
<td>$0.00</td>
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<tr>
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<tr>
<td>Hometown</td>
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<tr>
<td>FERPA</td>
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<table>
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<td>PREUGRD-ND</td>
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<td>Undergraduate Non-Degree</td>
<td>PREUGRD-ND</td>
<td>4</td>
</tr>
</tbody>
</table>
Add a new fund

When you need to request a new fund, you must complete the Add a new fund form in TAS and submit it for approval.

To Add a new fund:

1. Click on New Fund Manager
2. Click on Submit new request
3. Complete information required on Fund Request tab
4. Click on Administration Contact tab
5. Select constituent records for Administration contacts
6. Click on Stewardship Contacts tab
7. Select constituent records for Stewardship contacts
8. Click Save

Click on the link for New Fund Manager. NOTE: New Fund Manager is also available from the Fundraising page.

Click on Submit new request to open the Add a new fund window. There are three tabs on the Add a new fund window. Information must be entered on all three tabs before you click the Save button.

On the Fund Request tab, fields in yellow on the Add a new fund form are required and must be completed before submitting the request.
a. **Public name** – type the formal name of the fund. This is the name that will appear on gift receipts, acknowledgments, pledge reminders and reports.

b. **Name** – enter the short name that will display on TAS screens and the General Ledger (restricted to 30 characters).

c. **Description** – type the explanation of how the fund will be used (restricted to 240 characters). You must edit the description to fit this 240 character field.

d. **Reporting Description** – enter the full description when description had to be edited to fit the Description field.

e. **Department Org** – key the department organization that is fiscally responsible for the fund.

f. **SDR Reporting Level** – select the unit’s higher level where the fund resides.

g. **Use code** – select University for current use fund or Foundation for pending endowment fund.

h. **Development gift fund** – select Current Use or Pending Endowment (when Pending Endowment is selected, the Target date for endowment becomes a required field). Never select Endowment - it is used by central staff only.

i. **Purpose of fund** – select the option that best describes the purpose of the fund.
If you have questions on what information should be entered in one of the optional fields on the Add a new fund form click on the Help icon and read the help document.

Click on the Administration Contact tab.

Select the constituent record for both a fiscal and development contact. Questions about the fund will be directed to these individuals. The names will be listed as the administrators of the fund in Fund View.

Click on the Stewardship Contacts tab.

Select the constituent record for a Stewardship contact (if known). The name of the Stewardship contact will be listed on the fund page in Fund View.

Once all information is entered, click Save to submit the new fund request.

As the submitter of the Add a new fund form, you will receive an auto generated email letting you know the status of the request.
180 Day Hold Search

The 180 Day Hold Search shows gifts to current use funds that are being held and have not been posted to the General Ledger.

To Display the Gifts in 180-day hold:

1. From your Home Page, click on 180 Day Hold Search.
2. Enter the information for the desired fund(s).
   - Fund Number or
   - Name or
   - Department Org or
   - Home Department
3. Click on Apply.

Click on 180 Day Hold Search to open the Designation Fund View Search window.

**NOTE:** 180 Day Hold Search is also available from the Fundraising page.

Type the six digit Fund number, or type the fund name, or enter the Department Org or Home Department for the fund. Enter information in only one of these fields.
Total monies being held for the current use fund are displayed with monthly amounts indicated for the current month, one month, two months, etc. The monies displayed are being held and have not been transferred to the General Ledger.

You can drill down and see the details of the fund for any fund number that is displayed. Click on the icon to the left of the fund number and then click on Fund View.
The Fund View page for the selected fund number is displayed.
In addition to searching for a Fund by typing the fund number, you can also search for a fund using the Public Name. Type the name of the fund in the Public Name field and click Search.

**NOTE**: The search process is not case sensitive. You can use “wildcard” characters to take the place of part of your search phrase:

- Asterisk (*) or percent sign (%) takes the place of one or more characters
- Question mark (?) or underscore (_) takes the place of an individual character
Fund names that match the Public Name search criteria that was entered are displayed.

Click on the fund in the results section that you want to view or highlight the fund and then click Select.
### Fund View

**Fund Number:** 646074

**Descriptions:**
- Fund shall be used to Award one or more Non-Renewable Need Based Scholarships of Equal Amounts to Currently Enrolled Columbus Campus Students with a 3.0 GPA or Higher. 403010
- Established November 5, 2004, by the Stadium Cake Dress, friends, family, colleagues, community sponsors, Buckeyes football fans and rival fans through the Foundation. Distribution supports non-renewable need-based scholarships of equal amounts to currently enrolled Columbus campus students with a 3.0 GPA or higher who are not receiving a renewable merit scholarship.

**Fund Profile**

- **Name:** Stadium Cake Scholarship Fund - 646074
- **Description:** Fund shall be used to Award one or more Non-Renewable Need Based Scholarships of Equal Amounts to Currently Enrolled Columbus Campus Students with a 2.8 GPA or Higher. 403010
- **Public Name:** The Stadium Cake Scholarship Fund
- **Reporting:** Established November 5, 2004, by the Stadium Cake Dress, friends, family, colleagues, community sponsors, Buckeyes football fans and rival fans through the Foundation. Distribution supports non-renewable need-based scholarships of equal amounts to currently enrolled Columbus campus students with a 3.0 GPA or higher who are not receiving a renewable merit scholarship.
- **Department:** General Univ.-SPA Scholarship (68597)
- **GL Fund Number:** 646074
- **GL Fund Name:** Student Financial Aid
- **Endowment:** Yes
- ** Held for 180 Days:** No
- **Agreement/Plan:** None
- **Start Date:** 3/30/2000
- **Fund Closed:** No

**Development Activity**

- **Last Activity Date:** 5/30/2012
- **Cash:**
  - Gift in 180-day hold (not in GL)
  - Gifts Held 6 Months: N/A
  - Gifts Held 5 Months: N/A
  - Gifts Held 4 Months: N/A
  - Gifts Held 3 Months: N/A
  - Gifts Held 2 Months: N/A
  - Gifts Held 1 Month: N/A
  - Gifts Current Month: N/A

**Endowment Principal**

- **Endowment Principal as of:** March 31, 2012
- **Start Date:** 3/30/2000
- **Authorization Date:** 1/30/2004
- **Pending Number:** 403010
- **Principal Balance:** $123,520.21

**Endowment Distribution**

- **Endowment Distribution as of:** March 31, 2012
- **General Ledger as of:** Updated within the past 24 hours
- **Distribution Fund Number:** 246074
- **Distribution Fund Org:** 68597 - Gen Univ.-SPA Scholarship
- **Beginning Balances:** $436.52
- **Additions:** $5,157.85
- **Deductions:** ($5,157.85)
- **Liabilities:** $0.00
- **Non-Cash Assets:** $0.00
- **Cash Balance:** $186.37
- **Available Balance:** $186.37

**Stewardship**

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<thead>
<tr>
<th>Donor ID</th>
<th>Name</th>
<th>Relationship</th>
<th>Comment</th>
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</tr>
</thead>
<tbody>
<tr>
<td>90045094</td>
<td>OSU Stadium Cake Committee</td>
<td>Unknown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Administration Contact**

- **Name:** Donna J. Hubert
- **Role:** Sr. Fiscal Officer

**Categories & Tags**

- **Category:** Scholarship - Undergraduate
- **Tags:** OADEV
Under the Stewardship heading on the Fund View page, you can click on the Donor ID or the Name to view the constituent’s record.

**NOTE:** If you have not completed the TAS Navigation and Constituent View training session you will not have rights to view the constituent’s organization record.

You can update the Stewardship donor contacts, Administration contacts, Categories and Tags fields listed for a fund by editing the information listed on the Fund View page.

Click on Fund View Edits on the Explorer bar under the Tasks heading.

Tabs are displayed for each area that may be edited. Click on the tab that you want to edit. Click on Fund View on the Explorer bar to return to the Fund View page.
Fund View

You can Add or Edit the information. Click on the Add button to add information. Click on the icon to the left of the information to access the Edit button.

You should never Delete information that is listed!

Gift Memo Support Report

The Gift Memo Support Report and the Gift Memo Support CSV Report display gifts to a designation, department org or home department for the dates selected.

The Gift Memo Support Report and the Gift Memo Support CSV Report will both display the same information. However, the Gift Memo Support Report contains merged cells so if you want to export the data to Excel, be sure that you select the Gift Memo Support CSV Report.

To Display the Gift Memo Support Report:

1. From your Home Page, click on Gift Memo Support Report or Gift Memo Support CSV Report.
2. Enter the information for the desired Report.
   - Select Start Date.
   - Select End Date.
   - Type Designation ID List (six digit fund number) or Dept. Org number or Home Dept. number
3. Click on View Report.

Click on the Gift Memo Support Report or the Gift Memo Support CSV Report to open the Show Gift Memo Support report window.

NOTE: Gift Memo Support Report and Gift Memo Support CSV Report are also available from the Fundraising page.
Enter the Start Date and the End Date for the gifts that you want included on the report.

Gift Memo Support reports can be accessed by entering one of the following:

- Enter the six-digit fund number in the Designation ID List field. Multiple fund numbers may be entered by using a comma to separate the fund numbers or

- Enter the five-digit department org number in the Dept Org IDs field. Multiple Dept Orgs may be entered by using a comma to separate the dept org numbers or

- Enter the D#### home department number in the Home Dept IDs field. Multiple Home Dept IDs may be entered by using a comma to separate the home dept numbers

Click on View Report.
<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
<th>Revenue</th>
<th>Designation</th>
<th>Department Org</th>
<th>Home Dept</th>
<th>Application</th>
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<tbody>
<tr>
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<tr>
<td>00078537 Jane Noble Clinton</td>
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General Ledger Transfer Report

The General Ledger Transfer Report shows the date when monies from current use funds are posted to the General Ledger. This report is used to reconcile current use fund gifts.

To Display the General Ledger Transfer Report:

1. From your Home Page, click on Fundraising on the navigation bar.
2. Click on General Ledger Transfer Report.
3. Enter the information for the Report.
   - Select Year from drop down list.
   - Select Month from drop list.
   - Type Designation ID List (six digit fund number) or type Dept Org IDs or type Home Dept IDs
4. Click on View Report.

Click on General Ledger Transfer Report from the Fundraising page to open the General Ledger Transfer Report window.

Select the Year and Month for the gifts that you want included on the report. For example, if you want to reconcile gifts that were listed on your Detail Activity Report in eReports for January 2014, select 2014 as the Year and January as the month.
General Ledger Transfer Report can be accessed by entering one of the following:

- Enter the six-digit fund number in the Designation ID List field. Multiple fund numbers may be entered by using a comma to separate the fund numbers or

- Enter the five-digit department org number in the Dept Org IDs field. Multiple Dept Orgs may be entered by using a comma to separate the dept org numbers. Click on View Report

Click on View Report.

The Post Date shown on the GL Transfer Report is 2/4/2014. However, these are the gifts that were transferred to the GL for designation number 303578 at the end of January 2014.
Multiple Fund Detail CSV Report

The Multiple Fund Detail CSV Report compiles a listing of all funds by Home Department or Department Org that you can export to Excel.

To Display the Multiple Fund Detail CSV Report:
1. From your Home Page, click on Fundraising icon on navigation bar.
2. Click on Multiple Fund Detail CSV.
3. Enter the Fund Number or Public Name or Department Org or Home Department.
4. Click on View Report.

Click on Fundraising on the Navigation bar on the Home Page.

Click on Multiple Fund Detail CSV on the Fundraising page to open the Multiple Fund Detail CSV Report window.

Type the fund number, Department Org or Home Department and click View Report. If you want to include Closed Funds in your report, check the box in front of Include Closed Funds.

The Multiple Fund Detail CSV report contains additional information about the funds:
The report is designed to export as a CSV report and save or print it from Excel.
Exporting

Reports or the fund view screen may be exported by clicking on the disk icon at the top of the report/screen and selecting the file type:

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

To Export a Report or Fund Information Screen:

1. Click on disk icon on the top of the report or fund information screen.
2. Select the file type.
Printing

If you are going to print a Report or Fund View screen, export the report as a PDF or Excel and print from the PDF or Excel toolbar.
Help Resources

Please contact the 2Tech Advancement IT Service Desk with any questions or problems you encounter with TAS, Fund View or the Reports available in The Advancement System.

Contact the 2Tech Advancement IT Service Desk at 292-TECH (8324) or via email at 2tech@osu.edu.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Location</th>
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<tbody>
<tr>
<td>2Tech Advancement IT Service Desk</td>
<td>292-TECH(8324)</td>
</tr>
<tr>
<td>2Tech Advancement IT Service Desk</td>
<td><a href="mailto:2tech@osu.edu">2tech@osu.edu</a></td>
</tr>
<tr>
<td>Blackbaud Help Files</td>
<td>Available within TAS. Press F1 on the keyboard on any screen within the program.</td>
</tr>
<tr>
<td>Marie Gibbons</td>
<td><a href="mailto:Gibbons.66@osu.edu">Gibbons.66@osu.edu</a> or 614-292-9899</td>
</tr>
</tbody>
</table>
Appendix – Office of Financial Services

For more information on Endowments, go to:

www.treasurer.ohio-state.edu