



Advancement Services Reports Training

GIVING ANALYSIS REPORT

The Giving Analysis Report displays summarized and detailed giving for an entity. When run against a clipboard, it shows giving for a group of entities.

- Select 'Giving Analysis Report' from the reports menu.
- Enter either an entity ID number, or choose a clipboard from the dropdown menu.
- Select 'Run Report'.

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GIVING ANALYSIS

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Entity ID: Record Status: Active Record Type: Alumnus - Graduate
Gender: Female Birth Date:
Spouse ID: Spouse Name: Spouse Rec Type:

Preferred Address: Active Home Phone: Yrs of Giving: 36
Total Gift Credit: \$131,350.00
Total Pledge Credit: \$173,000.00
Outland Pldg Balance: \$112,500.00
Current FY Giving: \$3,000.00
Previous FY Giving: \$12,400.00
Matching Gifts Credit: \$0.00
Matching Claims: \$0.00
Campaign Commitment: \$2,000.00
Lifetime Commitment: \$242,900.00
Planned Commitment: \$100,000.00
Non Planned Commitment: \$142,900.00
Largest Single Gift Amt: \$6,000.00
Largest Single Gift Date: 11/11/2013

Other Active Address: Business Phone:
Job Title: Broker
Email:
Prof Class Yr/School: 1973 Liberal Arts - Martin

Giving Summary by C&E Purpose

Current Operations	
Academic Divisions	\$1,500.00
Athletics	\$11,650.00
Public Service	\$4,175.00
Physical Plant	\$100.00
Student Aid	\$1,180.00
Other Restricted	\$48,040.00
TOTAL:	\$67,375.00
Capital	
Property	\$20,700.00
Endowment Restricted	\$43,375.00
TOTAL:	\$64,075.00

Giving Summaries by Allocation Attributes

	GIFTS		PLEDGES	
Grand Totals	03/12/1981 - 08/06/2015	\$131,350.00	02/26/1997 - 04/09/2015	\$173,000.00
Summary by Allocation Campus				
UTM - UTM	03/12/1981 - 08/06/2015	\$131,350.00	02/26/1997 - 04/09/2015	\$173,000.00
UWA - University of Tenn System	09/30/2010 - 09/30/2010	\$100.00		
Summary by Allocation Division				
05 - Martin	03/12/1981 - 08/06/2015	\$131,250.00	02/26/1997 - 04/09/2015	\$173,000.00
17 - University-Wide Administration	09/30/2010 - 09/30/2010	\$100.00		
Summary by Allocation School				
Unknown	07/25/2012 - 04/20/2015	\$6,000.00	02/26/1997 - 02/26/1997	\$100,000.00
0502 - Student Affairs-UTM	04/03/1987 - 09/08/2000	\$350.00		
0535 - Other Academic Programs-UTM	06/02/2003 - 02/16/2010	\$16,350.00	06/02/2003 - 06/02/2003	\$16,000.00
0542 - College of Business & Global Affairs-UTM	03/12/1981 - 08/06/2015	\$16,350.00	07/19/2011 - 04/09/2015	\$25,000.00
0545 - College of Humanities & Fine Arts-UTM	01/19/1983 - 07/30/2015	\$78,350.00	12/02/1999 - 01/20/2009	\$18,000.00
0585 - Athletics-UTM	09/30/1997 - 11/03/2005	\$15,150.00	06/30/1997 - 06/30/1997	\$15,000.00

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	GIFTS		PLEDGES	
Summary by Allocation School				
1701 - University-Wide Administration-UWA	09/30/2010 - 09/30/2010	\$100.00		
Summary by Allocation Department				
0500000 - Unknown&Inactive	12/10/1988 - 11/07/2000	\$2,300.00	02/26/1997 - 02/26/1997	\$100,000.00
0501015 - Office of Development&Inactive	05/03/1983 - 05/02/1984	\$50.00		
0502020 - Student Life-UTM	07/25/2012 - 04/20/2015	\$6,000.00		
0503030 - Fine & Performing Arts-Inactive	04/03/1987 - 09/08/2000	\$350.00		
0504005 - Vanguard Theatre&Inactive	03/12/1981 - 10/16/1985	\$400.00		
0542015 - Business & Global Affairs Admin-UTM	06/02/2003 - 02/16/2010	\$16,000.00	06/02/2003 - 06/02/2003	\$16,000.00
0543055 - Health and Human Performance-UTM	01/19/1983 - 01/18/1984	\$150.00		
0545021 - Visual & Theatre Arts-UTM	06/17/2001 - 08/06/2015	\$1,750.00		
0545033 - History & Philosophy-UTM	02/10/2015 - 02/10/2015	\$100.00		
0545030 - Music-UTM	01/27/2003 - 04/20/2015	\$14,000.00	07/16/2011 - 04/09/2015	\$25,000.00
0550001 - Athletics Admin-UTM	01/16/1983 - 07/30/2015	\$32,400.00	12/02/1999 - 01/20/2009	\$18,000.00
0550002 - Men's Sports Programs-UTM	03/01/1981 - 07/30/2015	\$17,800.00		
0550003 - Women's Athletics Admin	03/14/1981 - 05/07/1988	\$478.00		
0550004 - Women's Sports Programs-UTM	05/21/1986 - 07/30/2015	\$22,740.00		
0550010 - Athletics-Football-Inactive	12/31/1984 - 01/27/1988	\$200.00		
0550060 - Athletic Programs-UTM	05/25/2004 - 07/30/2015	\$1,350.00		
0550001 - Scholarships-UTM	06/30/1987 - 11/03/2005	\$15,150.00	06/30/1997 - 06/30/1997	\$15,000.00
0550003 - Athletics-Special Gifts-Inactive	11/18/1987 - 03/21/1990	\$100.00		
0550040 - Athletics-Budgeted Expenditures-Inactive	01/20/1987 - 03/08/1990	\$350.00		
1701028 - N.A.A. - UWA	09/30/2010 - 09/30/2010	\$100.00		
Summary by Allocation				
ALPHA_25 - Alpha Delta Phi Sorority Lodge Fd	07/25/2012 - 07/25/2012	\$3,000.00		
ALPHA_26 - Alpha Delta Phi Sorority Lodge Fund	06/24/2013 - 04/20/2015	\$3,000.00		
ANTAR_17 - Fund for the Future	09/30/2010 - 09/30/2010	\$100.00		
ARTS_18 - UTM Arts Council Fd	05/03/1983 - 05/02/1984	\$50.00		
ATHLE_11 - UTM Mens Athletics Fd	01/19/1983 - 12/18/2001	\$3,000.00	12/02/1999 - 12/02/1999	\$2,000.00
ATHLE_17 - 899 Cornell Football Building	11/07/2000 - 11/07/2000	\$2,000.00		
ATHLE_39 - Athletic Weight Room Gift Fd	03/18/2004 - 03/18/2004	\$100.00		
BASIS_12 - UTM Baseball Fund	07/26/2001 - 07/12/2011	\$1,650.00		
BASIS_12 - Baseball Fund UTM	07/11/2012 - 07/30/2015	\$950.00		
BASIS_20 - UTM Mens Basketball Fund	03/09/1980 - 07/12/2011	\$2,300.00		
BASIS_24 - Womens Basketball Gift Fd	10/02/2000 - 07/12/2011	\$2,375.00		
BASIS_25 - Womens Basketball Gift Fund	12/22/2011 - 07/30/2015	\$5,370.00		
BASIS_36 - UTM Mens Basketball Fund	07/11/2012 - 07/30/2015	\$2,500.00		
CROSS_02 - UTM Mens Cross Country Gift Fd	06/18/2002 - 07/12/2011	\$200.00		
CROSS_03 - UTM Womens Cross Country Gift Fd	07/21/2005 - 07/12/2011	\$200.00		
CROSS_04 - UTM Mens Cross Country Gift Fund	07/11/2012 - 07/30/2015	\$190.00		
CROSS_05 - UTM Womens Cross Country Gifts	07/11/2012 - 07/30/2015	\$250.00		
ESTR_02 - John Estabrook Memorial End	07/20/2002 - 07/20/2000	\$100.00		
FIELD_01 - Cordelia B Fields Sch Endow	06/30/1987 - 04/22/2003	\$15,000.00	06/30/1997 - 06/30/1997	\$15,000.00
FOOTB_03 - UTM Football Fd	12/31/1984 - 07/02/2010	\$4,390.00		
FOOTB_05 - UTM Football Fund	01/12/2011 - 07/30/2015	\$1,650.00		
FOOTB_09 - Football Incentive Fund	01/20/2009 - 01/20/2015	\$6,000.00	01/20/2009 - 01/20/2009	\$6,000.00
FRIEN_04 - Friends of Music-UTM	03/06/2008 - 01/16/2008	\$200.00		
FRIEN_06 - Friends of Music - UTM	02/23/2012 - 02/23/2012	\$35.00		
GLES_01 - Giles/Gleason Scholarship Endow	07/15/2009 - 07/15/2009	\$100.00		
GLES_01 - Bettye Giles Field Enhancement	05/31/1995 - 07/08/2008	\$350.00		
GLES_02 - Giles/Gleason Scholarship Fd	04/08/2003 - 07/15/2003	\$250.00		
GMA_05_ATHL04 - GMA/ATHL PROG - ADJ	05/25/2004 - 05/25/2004	\$500.00		
GMA_05_MH0002 - GMA/ATHL SHORTS PROG	03/20/2000 - 03/20/2000	\$600.00		
GOLF_03 - UTM Golf Fund	06/18/2002 - 07/12/2011	\$1,080.00		
GOLF_06 - Golf Fund UTM	07/11/2012 - 07/30/2015	\$700.00		

The report generates as a Crystal Report. You can export to a PDF by clicking 'Export this Report' in the upper left corner, and choosing PDF from the dropdown menu.

- The Giving Analysis Report displays biographic information, as well as a summary of giving.
- Giving is also broken down by campus, school, department and allocation.

ENTITY PROFILE REPORT

The Entity Profile Report displays detailed data on an entity (including their spouse if applicable) such as Record Type, Degrees, Prospect IDs, Pledges and Gifts.

- Select 'Entity Profile Report' from the reports menu. You will need to specify 'Person' or 'Organization'.
- Enter either an entity ID number, or choose a clipboard from the dropdown menu.
- Select 'Run Report'.

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ENTITY PROFILE (Person)
Mr. [REDACTED]

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Entity ID: [REDACTED] Record Status: Active Birth Date: [REDACTED]
Gender: Male Marital Status: Married Last Research Date: 00/00/0000

Ethnicity: Caucasian European-American
Preferred School: Engineering - Knoxville
Current Membership: Legacy
Solicitation Controls: Do not solicit

Giving
Campaign Commit: \$0.00
Lifetime Commit: \$6,030,071.13
Largest Gift Amt: \$12,500.00

Home
(Active) (P) Shreveport Louisiana
Address: [REDACTED]
Phone: [REDACTED]
Fax: [REDACTED]
E-Mail: [REDACTED]

Business
(Inactive) Boston, Massachusetts
[REDACTED]
[REDACTED]
[REDACTED]

Job Title:

Record Types:
(AL) Alumnus - Graduate
(UM) 2-Yr UTM

Grad Date	Campus	Degree	School	Major
1980/08/00	UTM		Engr Tech & Engr - Martin	Electrical Engineering Tech
1982/00/00	UTK	Bachelor of Science	Engr - UTK	Mechanical Engineering

Spouse Information:

Spouse ID	Spouse Name	Spouse Record Type
[REDACTED]	[REDACTED]	(FR) Friend

Associated Prospect IDs:

Prospect ID	Name	Stage	Classification
[REDACTED]	[REDACTED]	Negotiation	

Recent Contacts:

Date	Contact Type	Contact Person	Contact Purpose
08/17/2015	Visit	Mr. Andy Wilson	Stewardship
Met with [REDACTED] at their home			
05/20/2014	Visit	Mr. Andy Wilson	Stewardship
visit with [REDACTED]			
04/11/2014	Visit	Mr. George Ashton Jennings	Cultivation
Met with [REDACTED] at the Development Council meeting.			

Active Pledge Commitments:

Date	Campaign	Allocation - Division	Overall Balance:	Allocation	Credit
01/12/2007	0502	Martin	\$5,750,000.00	Student Aid-UTM	Moore Scholarship Endowment 4,000,000.00
01/18/2008	0502	Martin		Student Aid-UTM	Deferred UTM Scholarships 1,750,000.00

The report generates as a Crystal Report. You can export to a PDF by clicking 'Export this Report' in the upper left corner, and choosing PDF from the dropdown menu.

- The Entity Profile Report displays biographic information, as well as recent contacts.
- Further down, the report displays active pledges and latest gifts. Active pledges are also broken down by allocation, amount paid and balances due.

Contact Report Detail displays the details of contact reports for entities meeting the selected criteria. You may use a clipboard in conjunction with selecting criteria for the report.

- Select 'Contact Report Detail' from the reports menu.
- You have the option to choose the following:
 - Contact Date Range (must use specified date format)
 - Prospect ID or Entity ID
 - Staff ID
 - Contact Type
 - Purpose
 - Office
 - Clipboard
- You can pull contact reports for a specific individual by entering their Entity ID number, or for a list of people by choosing a clipboard.

The Combo Report selects entities based on academic, geographic and UT gift/pledge criteria.

- Select ‘Combo(Geographic – Academic – Giving) Report (Export to Excel)’ from the reports menu.
- Person or Org defaults to Person.
- Record Status defaults to Active.
- Record Type Group defaults to Alumni.
- You are able to specify Purpose, Ethnic and Gender as well.
- Typing a name in the Clipboard Name field will automatically save the results to a clipboard.

Geographic:

- Choose to find only preferred or any active address.
- OPTION ONE: Enter a city/state and radius OR zip code and radius.
- OPTION TWO: Choose an Alumni Chapter or an Area of TN.

Academic:

- Select one of the following: Campus, Schools, Majors, or Concentration.
- You also have the option of choosing Degree Level, Degree and a Grad Date Range (you must follow the specified date format).

Giving:

- Select one of the following: Allocation Campus, Allocation Division, Allocation School, Allocation Department or Allocation Fund.
- You also have the option to choose a Gift Date Range (you must follow the specified date format).
- You may also choose a giving category (defaults to Lifetime Commitment Amount), Minimum Amount, and Minimum Years of Giving.

Once you finish selecting parameters, click ‘Run Report’. When the report finishes running, choose ‘Export’ then ‘CSV’.

The Combo Report exports to Excel (CSV file). Choosing to save the results a clipboard will allow you to run further reports against those results, create mailing labels, and perform other tasks.

EXAMPLE:

- Step 1: Choose Combo Report from the Reports Menu.
 Step 2: Leave default settings (Person, Active, Alumni) selected.
 Step 3: Choose your clipboard name. It should be named so that you will recognize when searching for the clipboard later (preface with your initials).
 Step 4: For Geographic Information, type '10001' as the zip. Choose a radius of 25 miles.

GEOGRAPHIC Information - Make selections in Option 1 OR Option 2

Preferred Address ☒ Use Preferred ☐ Use Any Active

Option 1 - Enter City/State + Radius OR Zip Code + Radius OR State

City

State

Zipcode

Radius (Miles) [Check Radius](#)

Option 2 - Enter Alumni Chapters OR Area of TN

Alumni Chapter

Area of TN

- Step 5: For Academic Information, choose Haslam College of Business as the school.

ACADEMIC Information - Select only one of the Degree Criteria parameters:
 Campus, School(s), Major(s), or Concentration

Campus

Schools Haslam Coll of Busn - UTK

Majors

Concentration

Degree Level

Degree

Grad Date Range (YYYYMM) From: To:

- Step 6: For Giving Information, choose 'UTK' for the Allocation Campus. Choose a Minimum Amount of \$1.

GIVING Information - Select only one of the Allocation parameters:
 Allocation Campus, Allocation Division, Allocation School, Allocation Dept, or Allocation Fund

Allocation Campus UTK

Allocation Division

Allocation School

Allocation Department

Allocation Fund

Gift Date Range (m/d/yyyy) From: To:

Giving Category Commitment Amount

Minimum Amount

Minimum Years of Giving

- Step 7: Click 'Run Report', then 'Export' and CSV. This report shows all UTK HCB graduates within 25 miles of New York City who have made a commitment of \$1 or more to UTK.

The Geographic Prospect Screening (GPS) Report displays detailed information for a specific entity or entities in a selected clipboard to include biographic information, degree information, wealth indicators, giving, and prospect information.

- Select 'Geographic Prospect Screening (GPS Report)' from the reports menu. Selecting Report to Excel will produce the same information in an Excel (CSV) format.
- Title the report.
- Choose an entity ID, or choose a clipboard. The most recently created clipboards will be at the bottom of the list.
- You have the option of choosing an allocation. For example, choosing an Allocation Campus of 'UTK' will show lifetime commitments specifically to UTK in the Allocation Giving section of the report. You can drill further down to Allocation Division, Allocation School, Allocation Department, or Allocation.
- Click 'Run Report'.

Description Geographic Prospect Screening (GPS Report)	
Type	Reports
Comment	Displays detailed information for a specific entity or entities in a selected clipboard to include home/business/email address info, degree info, wealth evaluation scores, giving amounts, and prospect/assignment info.
<input type="button" value="Run Report"/>	
Report Title	<input type="text" value="HCB New York Alumni Donors"/>
Enter Entity ID OR Select a Clipboard	
Entity ID	<input type="text"/>
--- OR ---	
Clipboard	<input type="text" value="75493: AA UTK HCB NYC"/>
Below fields are optional:	
Allocation Campus	<input type="text" value="UTK"/>
Allocation Division	<input type="text"/>
Allocation School	<input type="text"/>
Allocation Department	<input type="text"/>
Allocation	<input type="text"/>
Executive Job Title Only	<input type="radio"/> Yes <input checked="" type="radio"/> No
First Sort Order	<input checked="" type="radio"/> City <input type="radio"/> Name <input type="radio"/> Allocation Giving

The report generates as a Crystal Report. You can export to a PDF by clicking 'Export this Report' in the upper left corner, and choosing PDF from the dropdown menu. If you choose 'Report to Excel' version from the reports menu, you will need to export to CSV.

- A list of reports can be found by clicking on the 'Reports' link at the top menu of ANDI. Please contact the Advancement Services Help Desk if you have questions about a specific report.

Report List		Actions	Print
Reports listed below should NEVER be used to create mailing lists. For these requests, please contact your Campus Alumni Office or click here to send a request to ANDI Reporting.			
Reports		Actions	Help
Description			
*** Acknowledgment Mail Merge Report (Export to Excel)			
*** Allocation Report			
*** Alumni Counts by County Report			
*** Cash Receipts by Campus and School			
*** Clipboard List Report (Export to Excel)			
*** Clipboard Merge Report			
*** Combo(Geographic - Academic - Giving) Report (Export to Excel)			
*** Contact Report Detail			
*** Database Health Report			
*** Entity Profile Report (Organization)			
*** Entity Profile Report (Person)			
*** Giving Analysis Report			
*** Geographic Prospect Screening (GPS Report)			
*** Geographic Prospect Screening (Report to Excel)			
*** Major Commitments Report			
*** Number of Donors Comparison by Campus and School			
*** Proposal Detail			
*** Top X Donors to Specified Area Report			
*** Top X Donors to Specified Area Report (Export to Excel)			
*** Yearly Comparison Report			

- To submit a request for a report, please fill out the request form at: http://help.utk.edu/footprints/utfi/data_request/index.php
- Historical FYE reports can be found by visiting services.utfi.org and choosing the options under 'Reports'. Log in is required.

Advancement Services Help Desk
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