[*] If you are a fund holder (Principal Investigator) or business officer, this box will be pre-populated with your list of designated funds. Select the funds, and click the “Finish” button to enter the dashboard page.

If you are not a fund holder or business officer, you will have to perform one of two searches (These options will only be available to Advancement staff and campus FinancialLink Users):

1. **Basic Search**: You can type in a fund name or fund number in this search box and select one or more funds from the left box. Once you highlight the funds you would like to see, click “Insert” to populate the right box. Then click the “Finish” button to enter the dashboard.

2. **Advanced Search Options**: Click the link to expand search options. You will be presented with several data fields to query.
   a. Select the parameters.
   b. Click the “Filter” button at the bottom of the page.
   c. Select the funds you would like to see.
   d. Click the “Finish” button to enter the dashboard.
**Advanced Search Options**

* Please see Glossary for definition of terms.
* Advanced Search is separated by two types of parameters: OR / AND

**Or Criteria:** The resulting filters will meet any of the criteria selected within this section.

*Example:* If select Division: Alumni Office and Department: Annual Giving, will display any funds residing in Alumni Office or Annual Giving.

1. **Business Officer or Principal Investigator:** Search for funds by Business Officer or Principal Investigator.
2. **VC Area:** Select the area.
3. **Division**: Select the division.
4. **Department**: Select the department.
5. **Program**: Select the program.
And Criteria: The resulting filters will meet all of the criteria selected within this section.

Example: If select Purpose Category: Foundation and Fund Type: Endowment Fund, will display Foundation Endowment Funds only.

1. **Drop-Down Menus**: Select from the drop-down menus various fund attributes:
   - a. Purpose Category: Foundation or Regents
   - b. Fund Type: Current Expenditure or Endowment Fund
   - c. Fund Status: All, Active, Closed
   - d. Is Accepting New Gifts: Yes or No
   - e. Is a Trust: Yes or No

2. **VSE Category**: Select the VSE Category.
3. **VSE Subcategory**: Select the VSE Subcategory.
4. **Filter**: Click to review funds that meet your search criteria.
1. **Run As**: Click for options to view this report in different file formats.
   a. **Reset prompts and run**: Return to Fund Search with previous search parameters
2. **Update Search**: Click to return to Fund Search to modify existing search parameters.
   **New Search**: Click to open a new tab to Fund Search with reset search parameters.
3. **Drop-Down Menu**: Allows the user to adjust the accounting close date.
4. **Additional Info**: Various reports in Excel format.
   a. **Export Funds to Excel**: Export this report into Excel format.
   b. **Run Comprehensive Fund Detail**: Detailed information of the funds.
   c. **Run Historical Comprehensive Fund Detail**: Monthly balances for the funds selected.
6. **Fund**: Click the link for more details regarding the fund.
**Fund Details**

* **Back Button**: Click this to return to the previous page.

1. **New Overview**: Click to open a new tab to search for a fund that directly goes to its Fund Overview page.
   
   **New Search**: Click to open a new tab to Fund Search with reset search parameters.

2. **Dates**: Adjust date range and click the “Refresh” button to view information for that date range.
   - a. Click “Yes” under **Include All Dates** to view information for the fund since 1999.

3. **Fund Overview**: Overview of fund information.

4. **Links**: Click for more details regarding the fund.
   - c. Foundation Payout: View a history of the payout amounts by month. (For Foundation funds)
   - d. Regents Payout: View a history of the payout amounts by year. (For Regents funds)
   - e. Foundation Market Value: View a history of the market values by month. (For Foundation funds)
   - f. Regents Market Value: View a history of the market values by month. (For Regents funds)
   - g. Regents Book Value: View the book value of a Regents fund.
   - h. Donor/Gift Detail: View a history of all cash-in gifts to the fund (Excludes pledges).

5. **Documents**: Contains various documents and reports regarding the fund.
   - c. Gift Documents: Documents related to the creation of the fund.
1. After populating the Dashboard view of your funds, select “Save report as report view…” in the top left.

2. Change the Name to follow this format: LastNameFirstName_ListName
   a. SmithJohn_Alumni
3. Click the “Select another location” link.

4. Click the radio button next to Saved Fund Lists. Then click ok.

5. To locate your saved fund list:
   a. Team Content > Advancement STAR > Saved Fund Lists
6. In order to adjust dates on your saved list:
   a. Ensure 0 versions
   b. Prompt for values is unchecked