

The Advance system as well as other ancillary programs uses specific naming conventions for different aspects of the program and the development process. Listed here are the more common terms used in and in relation to Advance. If you would like to submit other terms not listed here, feel free to contact the Advance Help Desk by email or call 7-7795.

GLOSSARY OF TERMS

Term	Definition
Active	The default status of an Entity, indicating that the data within the profile is considered current and correct, that the Entity is alive, that the profile is not a known duplicate of another in the system.
Activity Code	This is a code created to indicate entities participation or invitation to an OSU/OSUF event.
Address Type	Indicates if the address is Home, Business or Seasonal. There are other types which describes email addresses such as Primary or Secondary email.
Address Status	Indicates if the address is current or past.
Affiliation	This tracks and indicates a group such as the Linus Pauling Institute or the 4H Foundation which have special relationship with OSU and are not tied to a particular college or unit.
Alerts	The Alerts and Messages system is a special handling window which is triggered when you are accessing the affected entity. The Alert notifies users of any special handling required for the entity. The Message part of this function is not in effect.
Allocation	A specific funding designation within a program or unit. Each program/unit can have multiple allocations.
Appeal	Mass marketing solicitation, such as by direct mail, or telephone. Every appeal has a unique Appeal code.
Assignments	Assignments are entered at each level of the prospect record. That is, at the Prospect level the assignment types are "Lead Manager" and "Lead Assist." At the program level the assignment type is "Program Coordinator," and at the proposal level the assignment types are "Lead Solicitor" and "Solicitor." Current and past assignments are also recorded here. Assignment at the Entity level is not currently being used.
Associated Donor	Describes the relationship of multiple donors associated with a single gift. This is seen typically between couples where one is the Primary and the spouse being the Joint donor. Other types are Covering Account, Group, In Memory or In Honor of donor.

Term	Definition
CAE Report	The CAE (formerly CFAE) report summarizes the sources and uses of gifts, both current operations and capital campaigns, in the format established by the Council for Aid to Education.
Clipboard	The Clipboard Window allows you to create, save and reuse lists of unique identifiers for entities, gifts, pledges, prospects, program prospects, proposals, contact reports, allocations and memberships.
Committee	The Committees Participation window maintains information about an entity's participation on various OSU/OSUF boards/committees.
Contact Reports	The Contact Report captures interactions (in person, by phone or correspondence) between OSU constituents and OSU/OSUF staff and volunteers. These reports are central to the documentation of these relationships.
Corporate Hierarchy	The Corporate Hierarchy window maintains the relationships between an organization entity and its subsidiaries.
Covering Account	The Covering Accounts window establishes a long-term relationship between a primary and an associated donor where a relationship between two entities such that whenever the primary donor donates, the associated donor receives soft credit.
Deceased	An entity status for an individual indicating that the entity is deceased, according to the information received and verified by DMG staff.
Drill Down	The drill down arrow takes you to the next level of detail in a record.
Duplicate	An entity status indicating that it contain at least some duplicate information for another entity but could also contain unique information. Duplicate entities are retained in the system until such time as all the information for one entity can be moved to the keeper record.
Entity	An individual or an organization tracked in Advance. Each entity has a unique system generated ID number.
Entity Notes	Are used primarily for Research profiles and rating information, news and other published articles. Historical data is also recorded here such as vault and reel numbers from the Registrar's Office.
Friend	An entity record type indicating an individual who is not an OSU alumnus or a OSU/OSUF faculty, staff member or Parent of an OSU alumnus.
Geo Code	This is a geographic code created to group selected zip codes into a specific defined grouping such as Tier 1 Seattle Metro or OR Corvallis 20 mr.

Term	Definition
Gift Credit	Gift credit is the combination of Legal and Soft credit. It does not include matching gifts; nor does it include Pledge credit, which is listed separately and strictly reflects pledges.
Gift Club	This is a special recognition program that honors OSU donors based on their giving history. Some of the clubs are annual programs and some are lifetime.
Group	A donor association type found in giving transaction displays. Group indicates that the transaction includes multiple donors and may include the Primary donor's spouse.
HEP	This is an acronym which stands for Higher Education Publications, Inc. This Company created a database of corporate matching gift programs and policies used in Advance.
Hyperlink	Green underlined text that is linked to another record, allowing you to jump directly to the "target" window.
Inactive Prospect	This indicates that the prospect is not currently being cultivated. The last assigned development officer has dropped the assignment.
Joint Donor	A donor association type found in giving transaction displays. Joint identifies the spouse of the Primary donor. This is usually the check signer. (Exception: non alum married to an alum).
Lookup	A search for data by description, type, reference number or specific code. Lookups are performed through menu commands via a Framebar button.
Mailing List	This indicates mailings being sent to an entity. It is also used as an exclusionary function in reporting.
Matching Gift Program	This is a program used by companies where they matched their employee charitable contributions.
Matching Claim	This a term which describes a pending status of a matching gift within a donor's giving summary.
No Email of Any Kind	This is a mail code indicating that the entity does not want to be contacted by email regardless of reason.
No Contact of Any Kind	This is one of the solicitation controls used in Advance. It indicates the entity does not want any contact with OSU/OSUF.
No Mail of Any Kind	This is one of the solicitation controls used in Advance. It indicates the entity does not want any mail from OSU/OSUF.
No Phone & No Mail Solicitation	This is one of the solicitation controls used in Advance. It indicates the entity does not wish to be solicited by phone or mail.
No Phone Solicitation	This is one of the solicitation controls used in Advance. It indicates the entity does not want to be solicited by phone.
No Mail Solicitation	This is one of the solicitation controls used in Advance. It indicates the entity does not want to be solicited by mail.

Term	Definition
No Phone of Any Kind	This is one of the solicitation controls used in Advance. It indicates the entity does not want to be contacted by phone.
Omit	A term used to describing excluding someone from something. In Advance a mail list code is created to omit an entity from receiving certain mailings.
Org Contact (ORGC)	This indicates the contact person for an organization. The contact may or may not be an entity in Advance and there can be multiple contacts.
Outright Gift	This is a term used to describe a gift made by a donor and is different from a pledge payment where the donor is paying on a pledge.
Pledge	A pledge is an entity's promise of a gift paid in installments. The installments range from a month, annual or multi-year.
Pledge Payment	This is a transaction type indicating a payment on Pledge by the Entity. This is different from an outright gift.
PMATS	This is the acronym which stands for Prospect Management and Tracking System.
Preferred Address	This indicates the physical address at which an entity wishes to get OSUF/OSU communications.
Primary Donor	Primary donor is the person signing the check. Exception: Alumni married to a non-alumni (try to give alumni credit-exception)
Program Interest	Identifies the recipient program for which a potential gift will be cultivated. There can be many program interests for a given Prospect, with one being the Primary Program Interest.
Prospect Notes	Are used primarily for summary information about the prospect and the OSU/OSUF development relationship. As of December 2007, gift agreements are also entered as Prospect Notes.
Prospect Record	Prospects are organizations, individuals, or combinations of entities that have been identified for gift cultivation purposes. Prospect types include: Individual, Couple, (combination of individual and other entity types such as a corporation), Corporation, Foundation, and others.
Prospect Reporting	This is the name of an Access utility created by the IS Team as a companion piece to Advance. It is a mini database which holds active prospect records and is updated daily from Advance (i.e. data is from the previous day).
Proposal	A proposal is the connection between a prospect and the results of an on-going solicitation. The Proposal details solicitations for the different programs and there can be several proposals for a given Prospect.

Term	Definition
Record Status	Code that describes the entity's state in the real world or in Advance, e.g. Active (meaning living or in business), Deceased, Purgable (will be deleted from the system).
Record Type	Are codes that describe the entity's relationship to OSU, e.g. Alumnus/na, Parent, Friend, Faculty/Staff, Matching Gift Corporation. An entity may have several different record types, but only one may be the primary type.
Report Distributor	<p>This is an Access utility created by the IS Team which holds various requested reports. Report Distributor serves multiple purposes.</p> <ul style="list-style-type: none"> • Delivery of scheduled reports to OSUF and OSUAA staff. Schedules are based on Users business needs or system limitations. • Provides various datasets from Advance for staff to query needed information. • Limited means for staff to upload data for loading into Advance.
Segment	Is a code used to assign and group entities for solicitation. This is similar to the appeal used in Advance.
Soft Credit	This is a term used to describe recognition dollars on a donor's gift record. Soft credit is used mainly for giving recognition to donors.
Solicitation Control	Indicates communication restriction, e.g. No Mail, No Contact of Any Kind. Currently we have six solicitation controls in place and additional mailing controls affecting e-mail restrictions.
Task	A task is entered to record tasks (ticklers) for an entity, prospect, program prospect, or proposal. Development Tasks reflect the next steps to be taken with a prospect and are entered primarily at the Program level. Development Officers or their Administrative Assistants enter and update program tasks after completing training.