

Scholar Management

The following topics are covered in this section. All scholar management is covered in this section except use of the Award Import Template. Contact is.help@arcsfoundation.org for more information on the Award Import Template.

- [Introduction to Scholar Management](#)
- [Search for Scholar Contact Record](#)
- [Update Current/Active Scholar Award Status to Completed](#)
- [Add Scholar Awards](#)
- [Create Scholar Mailing Group](#)
- [Create Scholar Email](#)
- [Sample Scholar Welcome Email and Login Instructions](#)
- [Scholar Forgets Password/Username](#)
- [Introduction to Scholar Contact Records](#)
- [Contact Record - Awards Tab](#)
- [Contact Record – Add Relationships](#)
- [Contact Record - Groups Tab](#)
- [Contact Record – Edit Data](#)
- [Awards Dashboard](#)
- [Find Awards](#)
- [Advanced Search](#)
- [Award Reports](#)
- [Scholar Relationship Reports](#)
- [Manage Groups](#)

INTRODUCTION TO SCHOLAR MANAGEMENT

The University Relations Chair and Web Administrator should be familiar with scholar **Contact Record** (CiviCRM) and **User Account** (Drupal) management. A **Contact Record** contains all known data on a scholar and is assigned the **Contact Type** as **Scholar**. A **User Account** allows the scholar to login to the website. Each scholar **User account** has the role **Scholar** assigned along with a **User ID** number. This role determines what the scholar views and can do on the website. It is critical that scholar **Contact Record** and the scholar **User Account** be kept current by the University Relations Chair or the Web Administrator. Follow the order below and it will be helpful in managing scholars.

SEARCH FOR SCHOLAR CONTACT RECORD

Existing scholars have a contact record. There are three main ways to search for an existing scholar's contact record.

1. Once familiar with it, this will be the easiest way to search quickly for a contact record. **Log in > CiviCRM > Locate the Search Box labeled "Contacts" in the upper left hand corner of the screen > Enter the Last Name of the individual and choices will appear**
2. **Log in > CiviCRM > Locate the Full-Text Search box in the middle of the left sidebar > Enter the Last Name of the individual > Go and choices will appear**
3. **Log in > CiviCRM > Search > Find Contacts and enter the name or email of the scholar.**

UPDATE CURRENT/ACTIVE SCHOLAR AWARD STATUS TO COMPLETE

Important: Before adding a new group of fiscal year scholars, the University Relations Chair or Website Administrator must change the **Award Status** of **Current/Active** scholars to **Complete**. To do this:

Step 1: Select **CiviCRM > Awards > Dashboard > Current/Active**

Step 2: Select **Actions**

Step 3: Select **Update Awards**



The screenshot shows the 'Find Awards' interface in CiviCRM. At the top, it says '40 Results' and 'Award Status(s) = Current/Active'. Below this, there are radio buttons for 'All 40 records' (selected) and '0 Selected records only'. An 'Actions' dropdown menu is open, with 'Update Awards' highlighted. A blue arrow points to this option. Below the menu, a table displays award records. The table has columns for 'Type', 'Awarded', 'Fiscal Year Start Date', and 'Award Finalized'. Two rows are visible: one for 'Beiler, Anna' and one for 'Hessel, Anthony', both with an 'Awarded' amount of \$8,500.00 and a 'Fiscal Year Start Date' of July 1st, 2017.

Type	Awarded	Fiscal Year Start Date	Award Finalized
Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018
Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018
Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018
ARCS Scholar Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018

Step 4: Update **Award Status** by selecting **Complete** from the dropdown. See top arrow.

Step 5: If required, enter the **Award Finalized date** for the group of scholars that are **Complete**. The **Award Finalized date** is per Chapter convention but must be between January 1 and June 30 of the academic year. For example, in Phoenix the **Award Finalized** date is considered final at the end of the fiscal year.

Step 6: Select **Update Awards**

Find Awards

Enter values for the fields you wish to update. Leave fields blank to preserve existing values.

Award Status: Complete

Amount Awarded in the Fiscal Year: [Blank]

Fiscal Year Start Date: [Blank]

Award Finalized *: 6/30/2018

This must be a date between 1/1 and the end of your Chapter's fiscal year depending on when your Chapter considers the award is finalized for purposes of the National Chapter Profile form.

Number of selected awards: 40

[Update Awards] [Cancel]

Step 7: Check the screen that follows to make sure the awards have been changed from **Current/Active** to **Complete** and that the **Fiscal Year Start Date** and **Award Finalized** date are correct for the scholar group selected.

Find Awards

▸ Edit Search Criteria

40 Results

Fiscal Year Start Date - greater than or equal to "July 1st, 2017 12:00 AM" AND less than or equal to "June 30th, 2018 11:59 PM"

Select Records: All 40 records 0 Selected records only

[Actions]

<input type="checkbox"/>	Name	Status	Type	Awarded	Fiscal Year Start Date	Award Finalized	
<input type="checkbox"/>	Vulic, Natasa	Complete	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
<input type="checkbox"/>	Cutts, Josh	Complete	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
<input type="checkbox"/>	Beiler, Anna	Complete	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit

ADD SCHOLAR AWARDS

Scholars need to have a **Contact Record** created, **Award** information entered and a **User Account** set up. Although there are several methods to do this, below is the typical method for Chapters with a small number of scholars. For scholars with a larger number of scholars, an **Award Import Template** spreadsheet has been developed by National IS Committee to enter scholar information and set up user accounts via bulk entry. Contact is.help@arcsfoundation.org to see if your Chapter is a candidate to use this import template.

Determine who enters scholar data. In some Chapters, the University Relations Chair is trained to enter scholar data and in others the Web Administrator enters scholar data. In some cases, the two share scholar data entry responsibilities.

NOTE: Before beginning award data entry in the order outlined below be sure to update [current/active scholar award status to completed](#). Also, obtain a spreadsheet with scholar contact information. (Last Name, First Name, Main Email, Main Address, Main Phone, Mobile Phone) as well as scholar award information as in the following screenshot. Scholar data drives both National and Chapter Reports as well as allows us to better connect scholars to each other and ARCS. The more data provided the better.

Step 3: Check the role as **Scholar**. Do **NOT** check **Notify user of new account** as this will cause confusion. This should be done via a personal welcome email from the University Relations Chair or Website Administrator with login instructions and any other pertinent information. Fill in the **First Name** and **Last Name**. **Important:** If the scholar already has a **Contact Record**, the **First** and **Last Name** must match exactly as on their **Contact Record** or a duplicate record will be created. Do **NOT** check **Can Access Financial Files**.

Roles

authenticated user

General Member

Scholar

Board Member

Site Admin

System Admin

Super Administrator

Notify user of new account

Name (First and Last)

First Name *

Last Name *

Can Access Financial Files

Step 4: The **Domain Access** should be populated with only your Chapter domain i.e. Phoenix. If not, uncheck any other domains. Confirm all data is entered correctly.

Step 5: Select **Create new account at the very bottom of the page**. A message at the top of the page indicates that the **User Account** has been created on the scholar's **Contact Record**. After a **User Account** is created a blue **CiviCRM ID/User ID** number will appear on the scholar's **Contact Record**.

2. Add "First Year" and "Continuing" Scholar Award Data

The following steps document how to add a "First Year" and a "Continuing" Scholar award to the database. After creating the **User Account**, the "First Year" Scholar now has a **Contact Record** so data entry is the same from here on out. **NOTE:** Before beginning scholar award data entry, obtain a spreadsheet with the **New Award** and **Scholar Additional Information** fields shown in the screenshots below from the University Relations Chair or train the UR Chair to enter scholar award data. Obtaining scholar award data in advance will streamline the data entry process.

Step 1: Login > CiviCRM

Step 2: Select **Awards > New Award** tab.

Step 3: Enter scholar award data on the form provided. In the first screenshot below, all fields are required except **Rationale** and **Notes**.

Award Status *

Award Type *

Amount Awarded in the Fiscal Year

Fiscal Year Start Date *

Award Finalized *

This must be a date between 1/1 and the end of your Chapter's fiscal year depending on when your Chapter considers the award is finalized for purposes of the National Chapter Profile form.

Rationale

Notes

Step 4: On the same page here is an example of what the **Scholar Additional Information** should look like. Maximize scholar data entries to ensure more accurate reporting at the National and Chapter level as well as better connect with our scholars. **Award Text/Bio** is optional.

Scholar Additional Information

Please enter the name of the award if you have chosen 'Named Award' above.

List how the award is to appear in the Event Program and/or Publicity. For example: Burton Family Foundation Scholar, The Johnston Endowment Scholar, Lawton Scholar, Theresa F. Jennings Memorial Scholar, ARCS Scholar Award.

Name of Named Award

Award School

Award Department

Award Major/Pursuing PH.D. In

Award Field of Study

Program

Scholar Sponsor(s)

New or Continuing

Multi Year Award

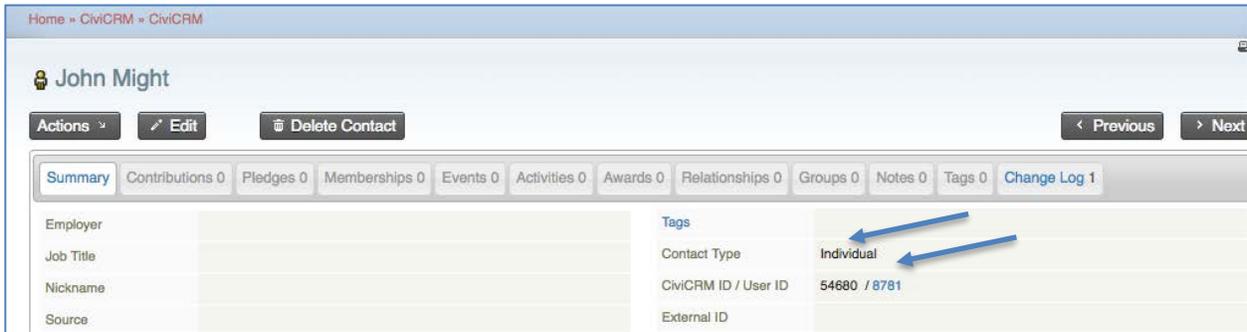
The bio displayed under the scholar's photograph on the "Current Scholars" page and/or for use in the event program.

Award Text/Bio

Award Reporting Chapter

Step 5: Be sure to select **SAVE** when done!!

Step 6: IMPORTANT: While on the scholar’s contact record, add scholar sponsor relationships. See section below [Contact Record – Add Relationships](#). This streamlines data entry and avoids having to come back to a scholar’s contact record to update this tab at a later date. **Note:** There are two important things to check when on the **Contact Record**. (1) If not already done, be sure to edit and change **Contact Type** from **Individual** to **Scholar**. See screenshot below. (2) After a **User Account** is created a blue **CiviCRM ID/User ID** number will appear on the **Contact Record**. Check to see if it is there. See screenshot below. If this is not there, notify is.help@arcsfoundation.org, as this may mean that there is a duplicate record and a merge is needed.



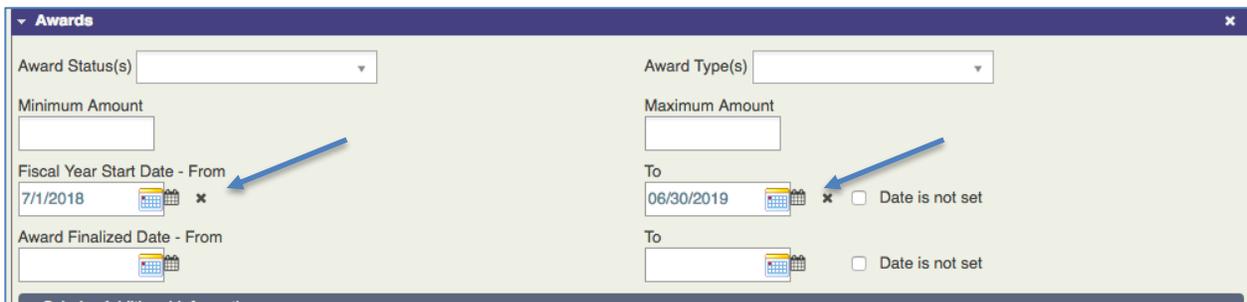
CREATE SCHOLAR MAILING GROUP

Once scholar awards have been added for the upcoming fiscal year, scholars can be emailed. However, before sending out communications, such as the [Scholar Welcome Email with Login Instructions](#), a scholar mailing group needs to be created. An easy way to do this is to **Create Smart Group** through **Advanced Search**. The example below documents how to create a scholar smart group and is followed by a section on how to [email the group](#). Other group management techniques are addressed below under [Manage Groups](#) such as adding the the current fiscal year scholars to the chapter [“Scholar or Scholar Alum” group](#). This group consists of all current and past scholars.

Step 1: Select **Login > CiviCRM > Search > Advanced Search**

Step 2: Scroll down to the **Awards** tab and select.

Step 3: Enter fiscal year start and end date of scholar group to email (see example below)



Step 4: Select your Chapter from **Award Reporting Chapter** menu at the bottom and select
Step 5: Select **Search** at bottom

Award Reporting Chapter

Step 6: Select **All Records**
Step 7: Select **Actions** drop down menu
Step 8: Select **Group – Create smart group**

36 Contacts Fiscal Year Start Date - greater than or equal to "July 1st, 2018 12:00 AM" AND less than or equal to "June 30th, 2019 11:59 PM" ...AND... Search Builder
Award Reporting Chapter In Phoenix

Select Records: All 36 records 0 Selected records only

Actions

- Export contacts
- Group - add contacts
- Group - create smart group**
- Group - remove contacts
- Mailing labels - print
- Map contacts
- Merge contacts
- Print selected rows
- Print/merge document

	City	State	Postal	Country	Email	Phone	Action
#2	Tucson	AZ	85719	United States	rabraun@email...	216-246-2494	View Edit more ▶
a Dr	Tucson	AZ		United States	juliacheng@ema...	480-209-5179	View Edit more ▶
reet	Mesa	AZ	85205	United States	rebecca.mccall...	520-780-1316	View Edit more ▶
...	Tempe	AZ	85281	United	josh.cutts1@am...	781-267-	View Edit more ▶

Step 9: Name the group (be sure to put the Chapter prefix before as in the example below), add **Description**, and **Group Type: Mailing List**.

Advanced Search

Smart Group

This smart group will stay up-to-date with all contacts who meet the search criteria.

- Fiscal Year Start Date - greater than or equal to "July 1st, 2018 12:00 AM" AND less than or equal to "June 30th, 2019 11:59 PM"
- Award Reporting Chapter In Phoenix

(learn more...)

Name *

Description

Group Type Mailing List

Parent Groups ?

Add Parent

Step 10: Select **Save Smart Group**
Step 11: Select **Done**.

This smart scholar group will now be accessible under Contacts > Manage Groups, and this group is now available to be the recipients of emails.

Note: If your Chapter would like to email University scholar groups separately from all scholars, then create smart groups for each University for that fiscal year. The All Scholars (Smart Group) can become a “parent” group. In this case, any changes to the “child” group would be reflected in the “parent” group. Go to **Advanced Search** as documented above, select **Awards**, enter **fiscal year start and end date**, and select the University that will be the “child” to the “parent” all scholar smart group.

The screenshot shows the 'Awards' search interface. It includes fields for 'Award Status(s)', 'Award Type(s)', 'Minimum Amount', 'Maximum Amount', 'Fiscal Year Start Date - From' (7/1/2018), 'To' (6/30/2019), 'Award Finalized Date - From', and 'To'. Below these is the 'Scholar Additional Information' section, which includes 'Name of Named Award', 'Award School' (Arizona State University), and 'Award Department' (Baylor College). Blue arrows point to the 'Fiscal Year Start Date - From' field, the 'To' field, and the 'Award School' dropdown menu.

Name the “child” University smart group, enter a Description, check Mailing List and add to the “parent” group. Save the smart “child” group and select Done. The “child” university smart group will now be accessible under Contacts > Manage Groups and available to be the recipients of emails.

The screenshot shows the 'Advanced Search' interface for creating a 'Smart Group'. The 'Smart Group' section includes a description: 'This smart group will stay up-to-date with all contacts who meet the search criteria.' and a list of criteria: 'Fiscal Year Start Date - greater than or equal to "July 1st, 2018 12:00 AM" AND less than or equal to "June 30th, 2019 11:59 PM"', 'Award School In Arizona State University', and 'Award Reporting Chapter In Phoenix'. The 'Name' field is 'phx_2018-2019 ASU Scholars (Sr)'. The 'Description' field is 'This is 2018-2019 fiscal year ASU Scholars. The parent group is phx_2018-2019 All Scholar Smart Group'. The 'Group Type' is 'Mailing List'. The 'Parent Groups' dropdown is set to 'phx_2018-2019 Fiscal Year All Scholars'. Buttons for 'Save Smart Group' and 'Cancel' are visible.

CREATE SCHOLAR EMAIL

Once [scholar awards have been added](#) and a [scholar mailing group](#) has been set up, emails can be sent such as the [Sample Scholar Welcome Email with Login Instructions](#) below. Either a previous scholar email can be re-used and updated as needed (see 1 below) or a new mailing can be set up (see 2 below).

1. Re-Use Previous Email

Emails that are sent out annually can be re-used and updated. Check to see, if one has been sent out for your Chapter. If one has already been created, re-use it as follows:

Step 1: Login > CiviCRM > Mailings > Scheduled and Sent Mailings

Step 2: Scroll to find past mailing that you want to re-use or search for the mailing. Select **Re-Use**.



		Christine	2018 10:40 PM	Christine	2018 12:00 AM	2018 12:40 AM	12:42 AM	
ARCS-Phoenix 2018 Awards Dinner Underwriting request	Complete	Matteucci, Anna...	March 8th, 2018 4:46 PM	Matteucci, Anna...	March 8th, 2018 4:59 PM	March 8th, 2018 5:40 PM	March 8th, 2018 5:41 PM	Report Re-Use more ▶
2018-2019 ALL SCHOLAR LOGON AND AWARD DINNER REGISTRATION EMAIL	Complete	Might, Diane	February 16th, 2018 9:55 PM	Spetzler, Nancy	March 8th, 2018 1:07 PM	March 8th, 2018 2:00 PM	March 8th, 2018 2:01 PM	Report Re-Use more ▶
Field trip	Complete	Hawes, Christine	March 5th, 2018 8:49 PM	Hawes, Christine	March 5th, 2018 9:27 PM	March 5th, 2018 10:20 PM	March 5th, 2018 10:21 PM	Report Re-Use more ▶
BOD Meeting Reminder	Complete	Hawes, Christine	February 28th, 2018 10:00 AM	Hawes, Christine	February 28th, 2018 10:00 AM	March 1st, 2018 10:00 AM	March 1st, 2018 10:00 AM	Report Re-Use more ▶

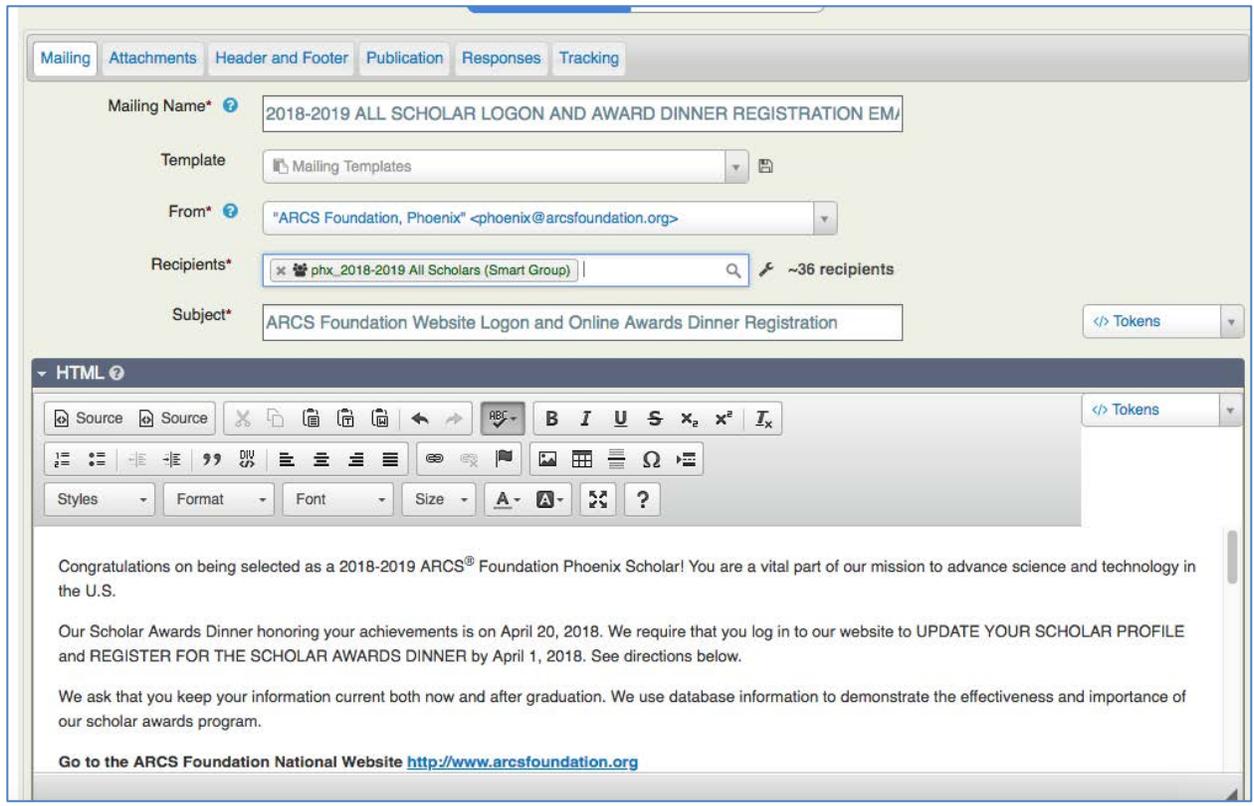
Step 3: From email needs to be an arcsfoundation.org address i.e. phoenix@arcsfoundation.org

Step 5: Select **Recipients** from dropdown i.e. phx_2018-2019 Fiscal Year All Scholars. Check the number of recipients to make sure they are correct.

Step 6: Edit **Subject**, if needed.

Step 7: Make edits to text as needed. **Important Note:** When editing, remember for no space between lines select “shift then enter.” For a double space between lines select “enter.”

Screenshot below is an example of the Scholar Welcome Letter.



Step 6: Send test email to yourself. You can send as many test emails to yourself, as needed, until the text is correct. Select **Save Draft**, if you want to continue later. The email will be found in **Mailings > Draft and Unscheduled Mailings** to edit or update as needed.



Step 7: To continue to submit the mailing, select **Next** and the following screen will appear.

√ 1. Define Mailing » 2. Review and Schedule

Review

Mailing Name: 2018-2019 ALL SCHOLAR LOGON AND AWARD DINNER REGISTRATION EMAIL

Recipients: Refresh recipient count
(Include: phx_2018-2019 All Scholars (Smart Group))

Content: HTML Plain Text

Attachments: None

Tracking: Click-Throughs Opens

Responding: Track Replies Forward Replies
 Opt-out Resubscribe Unsubscribe

Publication: Public Pages

Schedule

Send immediately
 Send at: [Calendar Icon] [Time]

Step 8: When ready, select **Submit Mailing**.

2. **Set Up New Mailing**

If no email has been previously sent to a scholar group, then a new mailing needs to be created.

Step 1: Login > CiviCRM > Mailings > New Mailing

Step 2: Enter **Mailing Name**. This is for reference. It is not the subject of the email.

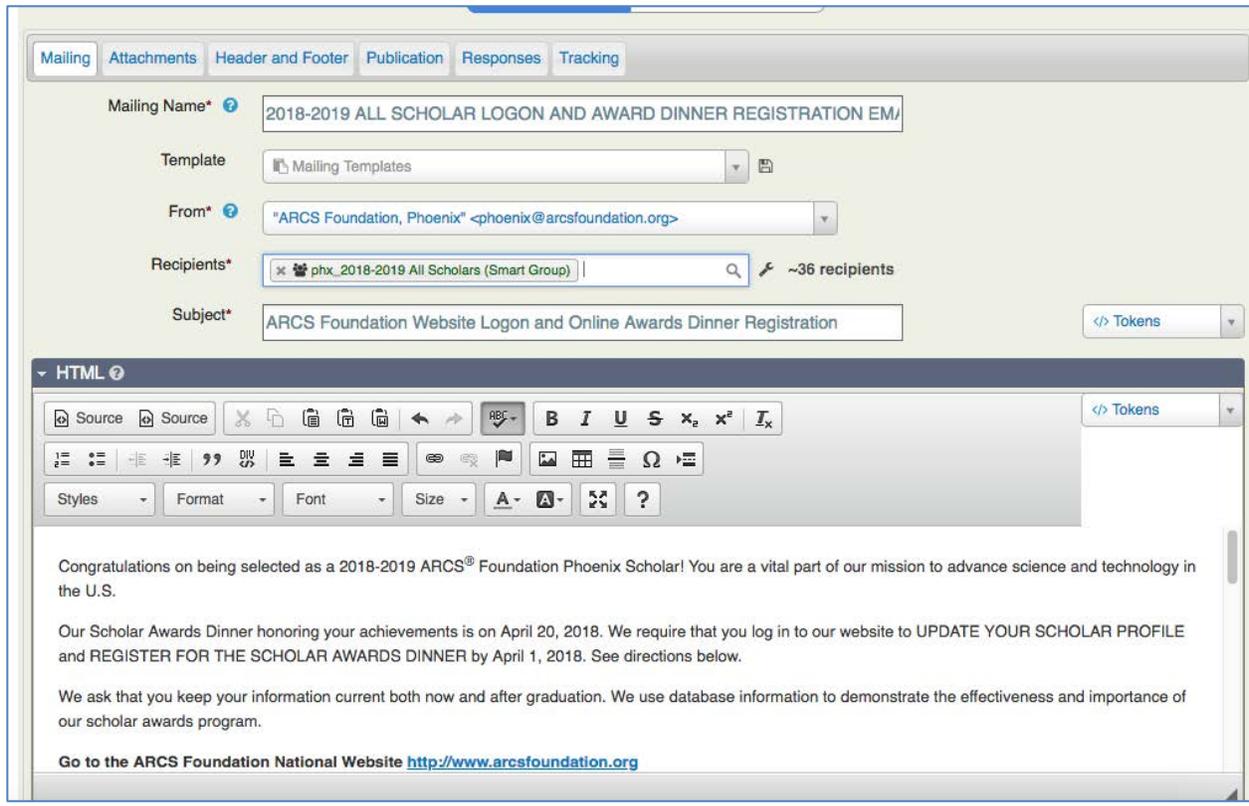
Step 3: **From** email needs to be an arcsfoundation.org address i.e. phoenix@arcsfoundation.org

Step 4: Select **Recipients** from dropdown i.e. phx_2018-2019 All Scholars (Smart Group). Check the number of recipients to make sure they are correct.

Step 5: Enter email **Subject**.

Step 6: Copy and paste into space provided or compose text in space provided. Make edits as needed. **Important Note:** When editing or composing, remember for no space between lines select "shift then enter." For a double space between lines select "enter." Screenshot below is an example of the Scholar Welcome Letter.

Step 7: Select the **Header and Footer** tab and check to make sure it is your Chapter's header and footer.



Step 8: Send test email to yourself. Before mailing scholars, edit until the text is correct. You can send as many test emails to yourself, as needed, until the email is correct. Select **Save Draft** if you want to continue later, and it will be found in **Mailings > Draft and Unscheduled Mailings**.



Step 9: To continue to submit the mailing, select **Next** and the following screen will appear.

✓ 1. Define Mailing
» 2. Review and Schedule

▼ Review

Mailing Name	2018-2019 ALL SCHOLAR LOGON AND AWARD DINNER REGISTRATION EMAIL
Recipients	Refresh recipient count (Include: phx_2018-2019 All Scholars (Smart Group))
Content	<input checked="" type="checkbox"/> HTML <input type="checkbox"/> Plain Text
Attachments	None
Tracking	<input checked="" type="checkbox"/> Click-Throughs <input checked="" type="checkbox"/> Opens
Responding	<input checked="" type="checkbox"/> Track Replies <input checked="" type="checkbox"/> Forward Replies <input checked="" type="checkbox"/> Opt-out <input checked="" type="checkbox"/> Resubscribe <input checked="" type="checkbox"/> Unsubscribe
Publication	Public Pages

▼ Schedule

Send immediately

Send at:

✓ Submit Mailing

← Previous
Delete Draft
Save Draft

Step 10: When ready, select **Submit Mailing**.

SAMPLE SCHOLAR WELCOME EMAIL WITH LOGIN INSTRUCTIONS

Before sending out an email asking scholars to login and update their profile, the Website Administrator **must** create scholar **User Accounts** or scholars will **not** be able to login and a scholar mailing group must also be created. See [Add Scholar Awards](#) before sending out any scholar emails. After **User Accounts** and a scholar mailing group are created, an email can be sent to all scholars by the University Relations Chair or the Website Administrator with information on how to login and update their scholar profile along with any other pertinent scholar welcome information. Below is a sample scholar welcome email with instructions on how to login and information on the upcoming scholar awards event. Modify as needed per Chapter protocol.

Congratulations on being selected as a 2017-2018 ARCS® Foundation Phoenix Scholar! You are a vital part of our mission to advance science and technology.

Our Scholar Awards Dinner honoring your achievements is on April 21, 2017. We require that you log in to our website to UPDATE YOUR SCHOLAR PROFILE and REGISTER FOR THE SCHOLAR AWARDS DINNER by March 31, 2017. See directions below.

We ask that you keep your information current both now and after graduation. We use database information for communications as well as to demonstrate the effectiveness and importance of our scholar awards program.

Go to the ARCS Foundation National Website <http://www.arcsfoundation.org>

1. **Click on Chapters Across the US (in light gray) on the right hand side of the main page, and select Phoenix.**
2. **Click on LOG IN at the top, on the blue bar.**
3. **Returning Scholars enter your username, which is the main email address you provided to ARCS. Enter your password or click “Forgot Your Password?” Follow directions.**
4. **New Scholars enter your username, which is the main email address you provided to ARCS. Enter password Arcs#2017. You will be able to change this password later under Account Settings.**
5. **If you have any difficulty, email is.help@arcsfoundation.org**
6. **After signing in, click on Account Settings (on the left). You may change your password here.**
7. **Click on the tabs “Scholar Profile,” “Involvement,” and “Education” (on the left) to complete information requested. Be sure to click SAVE at the bottom of each page.**
8. **Click on “Upcoming Events” and register yourself and one guest for the Scholar Awards Dinner. If you register online, you do not need to mail in the reply card you will receive via snail mail.**
9. **Enjoy browsing the ARCS Foundation website!**
10. **Sign in periodically to find out what’s new in ARCS Foundation, and what other scholars are doing!**

In closing, we want to remind you that your stories and photos serve as an inspiration to our members and help raise funds for future scholars. Many thanks to those of you who submitted articles and photos this past year. To get published on our website email submissions to phoenix@arcsfoundation.org.

If you have any questions, please contact me at the email address below.

Thank you,
Elizabeth Saba
VP University Relations
phoenix.universityrelations@arcsfoundation.org

SCHOLAR FORGETS PASSWORD/USERNAME

Sometimes a scholar forgets their Username and/or Password and decides not to use the “**Forgot Your Password?**” login function or for some reason this function isn’t working correctly. When requested by a scholar, here is how to assign a new username and/or password.

Step 1: Login

Step 2: Select People

Step 3: Enter the Primary Email that is on their Contact Record.

Step 4: Select Apply

Step 5: Under Operations select Edit and the following screen will appear. The username needs to be the same as the primary email on their **Contact Record**. If needed, the email and username can also be updated. The new password is entered underneath. A secure password can be assigned per site admin discretion i.e. Arcs*Scholar. The scholar can choose to keep or change this password on their login welcome page under “**Account Settings**.”

Step 7: SAVE!!!! After selecting **Save**, the username and email populates the scholar’s **Contact Record** automatically and the new password is set.

Home » Account Settings
john@might.net

VIEW EDIT

Account Education Involvement Member Profile Scholar Profile

Username *
john@might.net
Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores.

E-mail address *
john@might.net
A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password
Password strength: _____

Confirm password

To change the current user password, enter the new password in both fields.

Optional: To double check that the login works, log out of your account and login using the new scholar’s username and password. The welcome message name should be to the scholar. Be sure to log out when you are done.

INTRODUCTION TO SCHOLAR CONTACT RECORDS

On each individual’s contact record page there are tabs available at the top of the page that allow a variety of functions to be carried out. It is important to become familiar with a scholar’s [Awards tab](#), [Relationships tab](#), [Groups tab](#) and how to [Edit a Contact Record](#). **IMPORTANT NOTE:** When on a scholar’s **Contact Record** make sure the **Contact Type** is **Scholar**. If not select **Edit** and change from **Individual** to **Scholar**. See screenshot below.

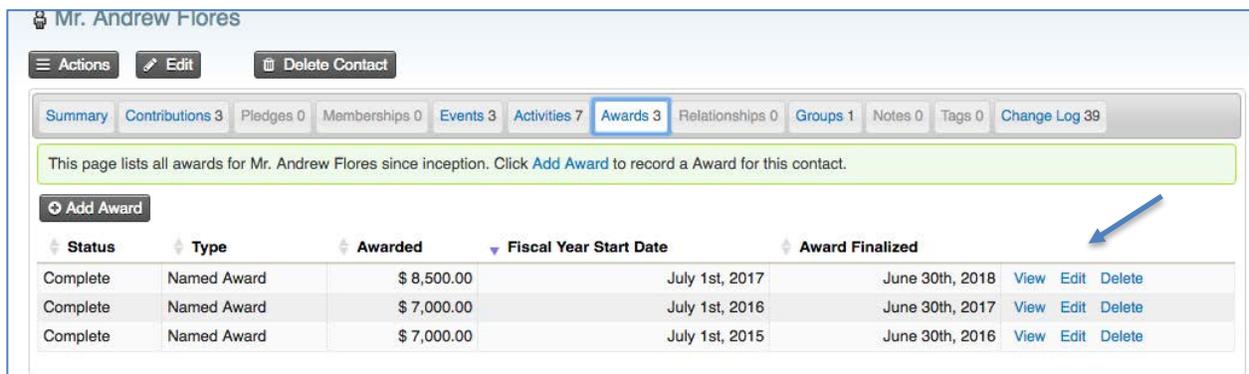
Note: While on a scholar's contact record, it is best to update as many tabs as possible. This is more efficient than updating one tab at a time and then having to go back to that scholar's contact record multiple times.



CONTACT RECORD – AWARDS TAB

It's always exciting when new scholars are selected and identified, and the ARCS year gears up with support for such bright individuals. All Chapters are required to enter annual scholar award data. This data drives both National and Chapter Reports as well as allows us to connect scholars. Unless your Chapter is using the **Award Import Template** to add awards, the recommended method for adding a scholar award is addressed in the section above [Add Scholar Awards](#).

Scholar awards can be individually updated or edited as needed on the contact record. Select the **Awards** tab and a record of the scholar's awards will appear. Note that they can be viewed, edited, or deleted as needed.



CONTACT RECORD – ADD RELATIONSHIPS

It is important to track known relationships for a scholar, select the **Relationships** tab > **Add Relationship**. The most important relationship to enter is who sponsored the scholar using **Sponsored by Individual** and/or **Sponsored by Organization**. The screenshot below shows how to enter the relationship data for a scholar. There are dropdowns so you can select the **Relationship Type** and

Contact(s). Note that scholar relationships are based on the fiscal year. **Be sure to SAVE the Relationship!!!**

Add Relationship for Mr. Andrew Flores

Relationship Type * Sponsored by Individual

Contact(s) * ✕ Might, Diane

Start Date 7/1/2017 * End Date 6/30/2018 *
If this relationship has start and/or end dates, specify them here.

Description

Notes

Permissions **Mr. Andrew Flores** can view and update information about selected contact(s).
 Selected contact(s) can view and update information about Mr. Andrew Flores.

Enabled?

✓ Save Relationship ✕ Cancel

After saving the relationship, here is what the **Relationships** tab will look like. Note: **Inactive Relationships** are listed below the **Current Relationships**.

Mr. Andrew Flores

Actions ▾ Edit Delete Contact

Summary Contributions 3 Pledges 0 Memberships 0 Events 3 Activities 7 Awards 3 **Relationships 1** Groups 2 Notes 0 Tags 0 Change Log 21

+ Add Relationship

Current Relationships

Show 10 entries First Previous 1 Next Last

Relationship	Contact	Since	Position	City	State/Prov	Email	Phone	
Sponsored by Individual	Might, Diane	July 1st, 2017		Scottsdale	AZ	dynamite@cableone.net	480-297-7008	View Edit more ▶

Showing 1 to 1 of 1 entries First Previous 1 Next Last

* Indicates a permissioned relationship. This contact can be viewed and updated by the other.

Inactive Relationships
These relationships are Disabled OR have a past End Date.

Show 10 entries First Previous 1 Next Last

Relationship	Contact	Since	Position	City	State/Prov	Email	Phone	
Sponsored by Individual	Might, Diane	July 1st, 2015		Scottsdale	AZ	dynamite@cableone.net	480-297-7008	View Edit Delete
Sponsored by Individual	Might, Diane	July 1st, 2016		Scottsdale	AZ	dynamite@cableone.net	480-297-7008	View Edit Delete

Showing 1 to 2 of 2 entries First Previous 1 Next Last

If a scholar is being sponsored by an organization the steps are the same, except use the Relationship Type **Sponsored by Organization**. See screenshot below.

Add Relationship for Mr. Andrew Flores

Relationship Type * **Sponsored by Organization**

Contact(s) * **ARCS Foundation - Phoenix Chapter**

Start Date **7/1/2017** * End Date **6/30/2018** *

If this relationship has start and/or end dates, specify them here.

Description

Notes

Permissions **Mr. Andrew Flores** can view and update information about selected contact(s).
 Selected contact(s) can view and update information about Mr. Andrew Flores.

Enabled?

Save Relationship **Cancel**

A **Scholar Sponsor Relationship Report** can be set up that associates scholars and their sponsors. See the following screenshot as well as the [Scholar Relationship Reports](#) below for more information.

Relationship Report - Current Scholar and Individual Sponsor.

August 1st, 2018 6:21 PM

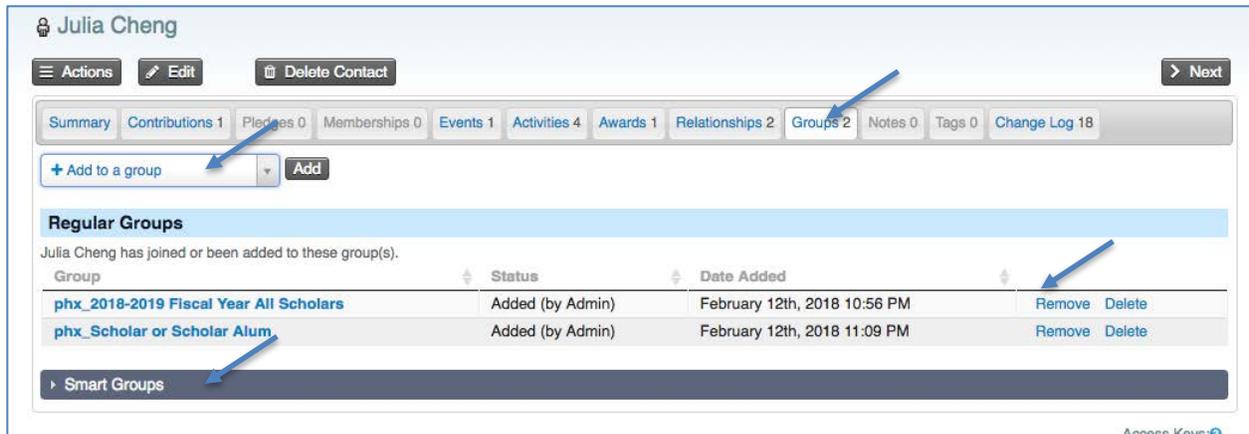
Contact Type A	Is Individual						
Contact Type B	Is Individual						
Relationship	Is one of Sponsored by Individual						
Start Date	Between July 1st, 2018 and June 30th, 2019						
Contact A	Contact B	Email (Contact A)	Email (Contact B)	Relationship A-B	Relationship B-A	Relationship Start Date	Relationship End Date
Cheng, Julia (55417)	Senger, Dawn (11138)	juliacheng@email.arizona.edu	dawn.erston@gmail.com	Sponsored by Individual	Sponsors	2018-07-01	2019-06-30
Cook, Rebecca (41934)	Kucera, Vianne (39296)	rebecca.mccall@asu.edu	viannek54@gmail.com	Sponsored by Individual	Sponsors	2018-07-01	2019-06-30
Cutts, Joshua (41718)	Sonntag, Lynne (1242)	josh.cutts1@gmail.com	sonntag@cox.net	Sponsored by Individual	Sponsors	2018-07-01	2019-06-30

CONTACT RECORD - GROUPS TAB

Maintaining scholar award groups is very important for emails, postal mailings and other actions related to scholars. A scholar can be added to a **Group**, removed from a **Group**, and rejoined to a **Group** either through their **Contact Record** or **CivCRM > Contacts > Manage Groups**.

One method to add or remove a scholar from a group is to select the **Groups** tab at the top of the **Contact Record**. To add to a group, select a group from **Add to group > Add**. To remove a member from a group, select **REMOVE**. To be safe **REMOVE** but **NEVER DELETE** a member from a group. If a scholar is a member of a **Smart Group**, it can also be viewed by selecting the **Smart Group** tab. See screenshot below. For information on how to create a scholar mailing group, see section [Create Scholar Mailing Group](#).

IMPORTANT: All scholars must have the group **chapter prefix_Scholar and Scholar Alum** assigned on their **Contact Record** (i.e. phx_Scholar and Scholar Alum)



All groups can be managed most efficiently by selecting **CiviCRM > Contacts > Manage Groups > Scroll to the desired group > Contacts**. If you are managing or creating groups for the first time and need assistance, contact is.help@arcsfoundation.org. See [Manage Groups](#) or [Create Scholar Mailing Group](#) below for more information on groups.

Examples of mailing groups that should be kept current on the contact record include the following.
Note: The Chapter prefix must be included. For example, phx_Scholar or Scholar Alum.

- chapter prefix_Scholar or Scholar Alum (All chapter scholars – current and alum)
- chapter prefix_YYYY-YYYY All Scholars (All current Scholars)
- chapter prefix_University Main Point of Contact (Main point of contact for each of the Chapter Universities used for mailings)
- chapter prefix_University Representatives (All university representatives i.e. Dean's, President's, etc. used for mailings)

CONTACT RECORD - EDIT DATA

Select **Edit** at the top of the **Contact Record** to add, update, or remove contact information. There are also boxes available for quick edits but to access all available contact record data, the **Edit** tab must be selected.



After selecting **Edit**, there are several other tabs below that apply to scholars that need to be filled in or updated with known information: **General Information, Scholar Eligibility, Scholars Only – Education, Scholars Only-General Information, Address, Communication Preferences, Demographics, and Tags**

and Groups. The following tabs do not apply to scholars: **Member Only Information** and **National Board Information**.

- a. **General Information Tab:** Fill in any other fields per Chapter convention that are applicable or information is known for. NOTE: If a scholar has filled in their scholar profile, some of these fields may already be populated. The **Household Name** and **Household Postal Greeting** do not need to be filled in unless the scholar needs an official tax letter for a donation.

- b. **Scholar Eligibility (Admin Use Only) Tab:** The use of this tab is dependent on how a Chapter’s selection process is set up. To see if this method applies to your Chapter, please contact is.help@arcsfoundation.org. This method currently applies best to Chapters with a selection process like Phoenix. The following fields are filled in before and updated after the University Relations meeting. See screenshot below for a scholar who was matched to a donor after the UR meeting. **Very Important Note:** The scholar eligibility data entered below is only available on the

contact side of the database. This data **must** be exported in **Awards Import Template** format for upload to the scholars' **Awards** tab or entered as noted above in [Add Scholar Awards](#).

University Submission Received	<input checked="" type="radio"/> Yes <input type="radio"/> No ✕
If you would like your Chapter added, please contact is.help@arcsfoundation.org	
Chapter	✕ Phoenix ✎
Award Status	✕ Completed ✎
Award Type	Named Award ✕ ✎
Fiscal Year Start Date	07/01/2016 📅 ✕
Award Finalized Date	06/30/2017 📅 ✕
NOTE: If you would like a university added, contact is.help@arcsfoundation.org .	
Award School	✕ University of Arizona ✎
Do not use \$ sign.	
Amount Awarded	8,500.00
List how the named award is to appear in the Event Program and Publicity. For example: Burton Family Foundation Scholar, Johnston Endowment Scholar, The Ziegler Scholar, Theresa F. Jennings Memorial Scholar	
Name of the Named Award	Might Scholar
Award Department	Graduate Interdisciplinary
Award Major	Physiological Sciences
Award Field of Study	✕ Biological Sciences ✎
Program	✕ Graduate ✎
List sponsor names exactly how they are to appear in Programs and Publicity. For example: Mr. and Mrs. William Wilhoit, Burton Family Foundation (3 Awards), ARCS Foundation, Inc., Phoenix Chapter Members, The Steele Foundation, The Crawford Endowment.	
Scholar Sponsor	Mr. and Mrs. Thomas Mic
New, Continuing or Prior	✕ Continuing Scholar ✎
Multi Year Award	✕ Third Year Scholar ✎
Current GPA	3.79
Current Advisor	Dr. Torsten Falk
Anticipated Graduation (i.e. 2016-05)	2018-05
Notes	<div style="border: 1px solid black; height: 40px;"></div>
Tally (#yes,#no,#maybes)	

c. **Scholars Only – Education Tab:** Scholars are required to fill this information out when they login to the secure site.

Scholars Only - Education	
First Degree	Undergraduate
First Degree Field of Study	Psychology (Cognitive an
First Degree School	University of Arizona
Date First Degree Received	<input type="text"/>
Second Degree	Graduate Certificate
Second Degree Field of Study	Statistics
Second Degree School	University of Arizona
Date Second Degree Received	<input type="text"/>
Third Degree	Master's
Third Degree Field of Study	Physiological Sciences
Third Degree School	University of Arizona
Date Third Degree Received	<input type="text"/>
Fourth Degree	<input type="text"/>
Fourth Degree Field of Study	<input type="text"/>
Fourth Degree School	<input type="text"/>

d. **Scholars Only – General Information Tab:** Scholars are required to fill this information in when they login to the scholar secure site.

Scholars Only - General Information	
Faculty Advisor	Torsten Falk
Advisor's Email	tfalk@email.arizona.edu
I would be interested in	<input type="checkbox"/> Being a speaker at an ARCS event or meeting <input type="checkbox"/> Sponsoring a field trip to your facility <input type="checkbox"/> Participating in PR endeavors for ARCS <input type="checkbox"/> Making a tax-deductible contribution to the chapter of my choice <input type="checkbox"/> Becoming a member or Friend of ARCS <input type="checkbox"/> Having ARCS members attend my dissertation and/or presentation <input type="checkbox"/> Joining ARCS on social media
Professional Societies	Society for Neuroscience American Physiological Society
Honors, Awards, Patents	Phi Beta Kappa Society, 2008 NIH-IMSD Fellowship, 2013
Additional Comments	<input type="text"/>

e. **Address Tab:** Here is the place to enter or update addresses, as needed. Be sure to select which address is the **Primary location for this scholar**. **For consistency, enter the main address, main phone, main mobile and main email and designate as the “primary” for each scholar.**

- f. **Communication Preferences Tab:** Here is the place to enter the **Addressee** per Chapter protocol. Examples include but are not exclusive to: Prefix., First Name, Last Name i.e. “Ms. Jessica Corman,” “Mr. Andrew Flores.” Special cases exist i.e. Ms. Rebecca Bason Mitchell that can be customized. When in doubt, confirm with the scholar. **Note:** Scholars have the option to change **Addressee**, when they fill out their online **Scholar Profile**. Sometimes they do not capitalize their name so it is up to the University Relations chair to look for this and edit when discovered. Be sure to change to Dr. once they receive their degree.

- g. **Demographics Tab:** Here is the place to indicate gender, birthdate and if the contact is deceased.

h. **Tags and Groups Tab:** This is another place to update **Groups** and/or **Tags** in addition to the tabs at the top of the contact record.

i. **SELECT SAVE WHEN YOU ARE DONE!!!**

AWARDS DASHBOARD

The **Awards Dashboard** is a valuable tool. If scholar award data entry has been done correctly, the following can be accessed: **Current/Active** awards and **Complete** awards. By clicking on the blue **Award status** or the **Number of awards**, you can view the scholars that are included in that count. Recent scholar activity is shown below the chart. The two **Award Status** groups that a Chapter typically uses are **Current/Active** and **Complete**. **Current/Active** refers to the current fiscal year scholars receiving awards that are not yet finalized. **Complete** refers to all scholar awards a chapter has supported and that are finalized. Each award payment reflects one year.

Note: If scholar totals are not correct, be sure to reconcile. Contact is.help@arcsfoundation.org, if assistance is needed.

Here is how to access and utilize the **Awards Dashboard**:

Step 1: Log In

Step 2: Click on **CiviCRM > Awards > Dashboard**. See example below.

Step 3: Click on either the **Award status** you want to view or one of the total numbers in the **Number of awards** column to the right of the **Awards status** column. A screen that lists the scholars with that particular awards status will appear. In the example below, the **Current/Active** status “**40**” was selected. See arrow below.

CiviAward Dashboard

CiviAward allows you to input and track awards to Organizations, Individuals or Households. The grantee must first be entered as a contact in CiviCRM. Use [Find Contacts](#) to see if there's already a record for the grantee. Once you've located or created the contact record, click **View** to go to their summary page, select the **Awards** tab and click **New Award**.

Awards Summary

This table provides a summary of **Award Totals**, and includes shortcuts to view the Award details for these commonly used search periods. Click the Award Status to see a list of Contacts for that grant status. To run your own customized searches - click [Find Awards](#). You can search by Contact Name, Amount, Award type and a variety of other criteria.

You have 1016 grant(s) registered in your database.

Award status	Number of awards
Submitted	0
Current/Active	40
Complete	976
Approved for Payment	0
Eligible	0
Awaiting Information	0
Withdrawn	0
TOTAL:	1016

Recent Awards

Name	Status	Type	Awarded	Fiscal Year Start Date	Award Finalized	
Vulic, Natasa	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
Cutts, Josh	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit

Step 4: To create a list in alphabetical order, click on the arrow in front of the column heading **Name**. You can also sort by any other column heading, as needed, using the arrows in front of the column heading (i.e. **Status, Type, Awarded, Fiscal Year Start Date, Award Finalized**) See screenshot below.

Find Awards

▸ Edit Search Criteria

40 Results Fiscal Year Start Date - greater than or equal to "July 1st, 2017 12:00 AM" AND less than or equal to "June 30th, 2018 11:59 PM"

Select Records: All 40 records 0 Selected records only

[Actions](#)

<input type="checkbox"/>	Name	Status	Type	Awarded	Fiscal Year Start Date	Award Finalized	
<input type="checkbox"/>	Beiler, Anna	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
<input type="checkbox"/>	Boehringer, Ashley	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
<input type="checkbox"/>	Boroson, Ethan	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
<input type="checkbox"/>	Bowman, Elizabeth	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
<input type="checkbox"/>	Branch Kelly, Marion	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
<input type="checkbox"/>	Cook, Rebecca	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit
<input type="checkbox"/>	Cutts, Josh	Current/Active	Named Award	\$ 8,500.00	July 1st, 2017	June 30th, 2018	View Edit

Step 5: Select **Actions**. A dropdown list of **Actions** appears to do a variety of functions such as export awards to an excel spreadsheet, print selected rows, delete awards, and update awards. The only two actions a Chapter typically uses are the **Export Awards** and/or the **Update Awards**. Note that an action can be performed on all of the records by selecting the top left radio button

All Records. In the example below, the action selected was **Update Awards** for the 40 **Current/Active** scholars so that their status could be changed to **Complete**.

The screenshot shows the 'Find Awards' interface. At the top, there is a search criteria section with a filter: 'Fiscal Year Start Date - greater than or equal to "July 1st, 2017 12:00 AM" AND less than or equal to "June 30th, 2018 11:59 PM"'. Below this, there are radio buttons for 'All 40 records' (selected) and '0 Selected records only'. A dropdown menu is open, showing options: 'Delete Awards', 'Export Awards', 'Print Selected Rows', and 'Update Awards' (highlighted in blue). Below the dropdown is a table with columns: Type, Awarded, Fiscal Year Start Date, Award Finalized, View, and Edit. The table contains three rows of 'Named Award' records, each with an amount of \$ 8,500.00 and dates from July 1st, 2017 to June 30th, 2018. At the bottom left, a scholar's name 'Boroson, Ethan' is listed with a status of 'Current/Active'.

Note: To perform an action on **Selected Records Only**, check the box in front of the scholar name(s) and then select the **Actions** dropdown list. Select the action you would like to perform. If assistance is needed with any of the actions in the dropdown list, contact is.help@arcsfoundation.org.

FIND AWARDS

While the **Awards Dashboard** is the easiest way to quickly find awards data, there is another method available to find awards that yields more data.

Step 1: Log in

Step 2: Go to **CiviCRM > Awards > Find Awards**. The screenshot below shows that there are a variety of criteria available to access many types of scholar data and export or update as needed.

Step 3: Select the needed criteria and then **Search** to obtain data.

Name or Email

Award Status(s) Award Type(s)

Minimum Amount Maximum Amount

Fiscal Year Start Date - From To Date is not set

Award Finalized Date - From To Date is not set

▼ Scholar Additional Information

Name of Named Award

Award School - any -

Award Department

Award Major/Pursuing PH.D. In

Award Field of Study - any -

Program - any -

Scholar Sponsor(s)

New or Continuing - any -

Multi Year Award - any -

Award Text/Bio

Award Reporting Chapter - any -

ADVANCED SEARCH

Another way to perform more refined searches for awards, is to use **Advanced Search**. **IMPORTANT NOTE:** This is a great way to access any information that you need from the website all in one spot and is important to learn how to use!

Step 1: Log In

Step 2: Go to **CiviCRM > Search > Advanced Search**

Step 3: At the top of the page there are criteria, such as **Search Views**, that can be selected depending on what is being searched for such as **Basic Criteria**. Also note that if a contact is ever accidentally deleted, you can search for it in trash and restore it. See blue arrows in the screenshot below.

Search Criteria ?

Display Settings For Results

Display Results As ?
Contacts

Views For Display Contacts ?
- default view -

Search Settings

Search Operator ?
 AND OR

Search in Trash
(deleted contacts)

Basic Criteria

Complete OR Partial Name

Complete OR Partial Email

Contact Type(s)

Group(s) (search by group type)

Select Tag(s)

All Tags ?

Phone

Phone Location
- any -

Phone Type
- any -

Punctuation and spaces are ignored.

Exclude Include by Privacy Option(s) ?

Preferred Communication Method
- any -

Email On Hold

Contact Source ?

Job Title

Preferred Language
- any -

Contact ID ?

External ID ?

CMS User? Yes No
Does the contact have a Drupal Account?

Address Fields

Custom Fields

Activities

Relationships

Demographics

Notes

Change Log

Contributions

Pledges

Memberships

Events

Awards

Step 4: Scroll to the **Awards tab** for further search criteria. Note that scholars can be easily searched for by **Award School**, **Award Field of Study** as well as other fields. Other tabs can also be selected depending on the criteria needed. **Once criteria is selected, be sure to click Search.**

▸ Pledges
 ▸ Memberships
 ▸ Events
 ▾ Awards

Award Status(s)
 Award Type(s)
 Minimum Amount
 Maximum Amount
 Fiscal Year Start Date - From
 To Date is not set
 Award Finalized Date - From
 To Date is not set

▾ Scholar Additional Information

Name of Named Award
 Award School
 Award Department
 Award Major/Pursuing PH.D. In
 Award Field of Study
 Program
 Scholar Sponsor(s)
 New or Continuing
 Multi Year Award
 Award Text/Bio

AWARD REPORTS

A variety of chapter Award reports can be set up based on Chapter needs. The screenshot below shows the **Award Reports** that have been set up in Phoenix. Contact is.help@arcsfoundation.org, if assistance is needed setting up scholar reports to meet your Chapter needs. To find these reports **Login > CiviCRM > Awards > Awards Reports** or **Login > CiviCRM > Reports > Awards Reports**.

Award Reports

+ New Award Report View All Reports

Award Reports		
» Award Report (Detail) - PHX Scholar Award List by Year	Award Report Detail	View Results more ▶
» Current All PHX Scholar Information	Report with additional award information can be generated for whatever year you need by adjusting filter fiscal year dates.	View Results more ▶
» Current ASU Scholar Address List	ASU Award Report can be generated for whatever year you need by adjusting filter fiscal year dates.	View Results more ▶
» Current NAU Scholar Address List	NAU Award Report can be generated for whatever year you need by adjusting filter fiscal year dates.	View Results more ▶
» Current UA Scholar Address List	UA Award Report can be generated for whatever year you need by adjusting filter fiscal year dates.	View Results more ▶
» Phoenix Award Report (Statistics)	Shows statistics for Grants.	View Results more ▶
» PHX Award Report (Detail) - Scholar Alpha List	Award Report Detail	View Results more ▶

+ New Award Report View All Reports

Note: There are also a variety of scholar reports that have been set up by the IS Committee that contain extensive Chapter and National scholar information. These are located on the welcome page after login to a Chapter. See screenshot below. When in CiviCRM, select **Home > My Portal** to access this page.

MEMBER PORTAL

- HOME
- EVENTS/REGISTRATION
- PATS LEARNING PORTAL
- DOCUMENT LIBRARY
- ARCS MEMBERSHIP
- ACCOUNT SETTINGS
- MEMBER PROFILE
- VOLUNTEER INTERESTS AND SKILLS
- DONATE
- HELP
- REPORTS**
- ONLINE FORMS

Welcome, Mrs. Diane Might, to ARCS Foundation

ARCS® Foundation is a nationally recognized nonprofit 501(c)(3) organization started and run entirely by women who boost American leadership and aid advancement in science and technology. To address the country's need for new scientists and engineers, we provide unrestricted funding to help the country's brightest graduate and undergraduate students create new knowledge and innovative technologies.

- We sponsor talented, motivated American students at top U.S. research universities.
- Nine out of 10 ARCS Scholars after they graduate work in their sponsored fields - creating knowledge, developing technologies, launching start-up companies, inspiring youth.
- Our 15 chapters build industry partnerships to support research important to their own communities.

Current News

ASU SCHOLAR HONORED FOR SCIENCE ADVOCACY
Posted on Thursday, May 17, 2018

Jennapher Lingo VanGilder, an ARCS Foundation Phoenix Scholar, was recently honored for her science advocacy efforts from the Graduate and Professional Student Association at Arizona State University. Inspired by her previous research experiences with animals, Jennapher helped cofound the Research Animal Retirement Foundation (rarfoundation.org), a non-profit organization that aims to raise... [Read more](#)

Suppose you want to check that the fiscal year scholar group has been added correctly. **Login** and on Welcome page select **Reports > Awards by Year and Program**. Select **Award Reporting Chapter** and enter the fiscal year for the scholar group you are interested in. The scholar awards that have been entered from that fiscal year will appear.

This report is a scholar report by year. It lists scholars with the amount received by award finalized year and program. For example, a scholar that received three awards finalized by the end of fiscal year 2010, 2011, 2012 at \$7000 per year would have three entries of \$7,000 each. When searching for a group of scholars, enter the date between the fiscal year start date and the fiscal year end date for the group of scholars you are looking for.

Award School

Award Reporting Chapter

Last Name

Date is between

And

Use the 2015-07-01 date format, e.g. use 2015-07-01 and 2016-06-30 for a fiscal year

SCHOLAR RELATIONSHIP REPORTS

A variety of **Relationship Reports** can be set up based on Chapter needs. The screenshot below shows the **Relationship Reports** that have been set up in Phoenix. Select **Contacts > Contact Reports** and a screen will appear with several different scholar **Relationship Reports** to choose from. The titles need to indicate which reports relate to scholars. If assistance is needed setting up relationship reports contact is.help@arcsfoundation.org

» PHX Scholar University Submissions - Current Year	Annual list of University submissions to PHX UR. Update annually by selecting Filter>>Scholar Eligibility (Admin Use Only). Scroll to "Submission Fiscal Year Start Date" and fill in new fiscal year start and end date.	Delete
» PHX Scholar University Submissions - Current Year No Award	Annual list of University submissions to PHX UR. Update annually by selecting Filter>>Scholar Eligibility (Admin Use Only). Scroll to "Submission Fiscal Year Start Date" and fill in new fiscal year start and end date.	Delete
» Relationship Report - Current Chapter Board (7/1/2017-5/30/2018)	Note how start and end dates are entered. Update the start and end dates annually and change dates in the title to get the current BOD.	Delete
» Relationship Report - Member Board Position History	Use for ARCS Light Selection. Gives relationship between Board member position and ARCS Phoenix.	Delete
» Relationship Report - Scholar and Individual Sponsor (7/1/2016-6/30/2017)	Gives relationship between a scholar and the individual who sponsors them.	Delete
» Relationship Report - Scholar and Organization (7/1/2016-6/30/2017)	Gives relationship between a scholar and the organization who sponsors them.	Delete
» Relationships - All Contacts	Gives relationship details between two contacts	Delete
» Scholar - Interested in ARCS PHX Involvement	Constituent Report (Summary) - Provides a list of scholars or scholar alums interested in areas such as speaking, hosting a field trip, ARCS PR or contributing a tax- deductible donation.	Delete

In Phoenix, for example, an important report is a list of all scholars who are interested in being involved with the chapter. This report can be found by **Login > CiviCRM > Reports > Contact Reports > Relationship Report > Scholar – Interested in ARCS PHX Involvement**. See screenshot below:

Scholar - Interested in ARCS PHX Involvement

Columns | Sorting | Filters | Title and Format | Email Delivery | Access

Preview Report | Update Report | Save a Copy...

Print Report | PDF | Export to CSV | Add Contacts to Group

Group: Is phx_Scholar or Scholar Alum

I would be interested in: Is one of Being a speaker at an ARCS event or meeting, Sponsoring a field trip to your facility, Participating in PR endeavors for ARCS, Making a tax-deductible contribution to the chapter of my choice, Becoming a member or Friend of ARCS, Having ARCS members attend my dissertation and/or presentation, Joining ARCS on social media

Next > | Last >> | Records 1 - 50 of 138 | Page 1 of 3

Contact Name	Email	Phone	Street Address	City	Postal Code	State/Province	I would be interested in
Antoninka, Anita	aja6@nau.edu	928-525-1059	47 Toho Trail	Flagstaff	86001	Arizona	Being a speaker at an ARCS event or meeting, Sponsoring a field trip to your facility
Apker, Gregory	gregory.apker@asu.edu	480-229-2544	200 E. Southern Ave. #143	Tempe	85282	Arizona	Participating In PR endeavors for ARCS
Arciero, Julia		734-306-8766	951 W. Orange Grove	Tucson	85704	Arizona	Being a speaker at an ARCS event or meeting

Important Note: This report can also be easily created on the login home welcome page by selecting **Reports > Scholar – ARCS Involvement** and filling out selected criteria below.

HOME » MY PORTAL » ARCS INVOLVEMENT

This report lists all scholars who indicated they want to participate in ARCS by award reporting chapter and award school. The report also lists the "First Year Award Finalized." For example a scholar chosen during fiscal year 7/1/2016 - 6/30/2017 would have an award finalized year of 2017.

I would be interested in

- Being a speaker at an ARCS event or meeting
- Sponsoring a field trip to your facility
- Participating in PR endeavors for ARCS
- Making a tax-deductible contribution to the chapter of my choice
- Becoming a member or Friend of ARCS
- Having ARCS members attend my dissertation and/or presentation
- Joining ARCS on social media

Chapter

Last Name

Award School

Another useful report is to create a **Relationship Report**, such as for scholars sponsored by individuals or scholars sponsored by organizations. Follow these steps to create a **Relationship Report**.

- Step 1:** Select **Reports > Contact Reports**
- Step 2:** If there is not an existing report that meets needs, select **New Contact Report**
- Step 3:** Select **Relationship Report Template**
- Step 4:** Select **Columns** tab and check desired fields.
- Step 5:** Select **Filters** tab and select and/or enter desired filters.
- Step 6:** Select **View Results**
- Step 7:** If report yields desired information, select **Actions > Create Report**.
- Step 8:** Check **Existing Reports**. Edits can be made to **Columns** and **Filters**, as needed. Note: a variety of actions can be performed on **Existing Reports**, as needed.

MANAGE GROUPS

Groups are very important for emails, mailings, and any other actions relating to scholars. It is important that they be kept current by Web Administrator or University Relations Chair. In the example that follows, Phoenix is used. To access the **Group** containing all Phoenix Chapter scholars select **Login > CiviCRM > Contacts > Manage Groups > scroll to Scholar or Scholar Alum > Contacts**. All scholars must have this group assigned. Scholars can be added or removed from groups through either a scholar’s contact record or through **Manage Groups**. **Disable** groups that are no longer in use but that the Chapter wants to keep.

Note: The count on the **phx_Scholar or Scholar Alum** must match the **Awards Dashboard** total of **Current/Active plus Complete**.

phx_2017-2018 Fiscal Year All Scholars	40	Might, Diane	All ASU, NAU and UA scholars for fiscal year 2017-2018	Mailing List	User and User Admin Only	Contacts Settings more ▶
phx_Scholar or Scholar Alum	607		Scholar or Scholar Alum - Access Control and Mailing List	Mailing List	User and User Admin Only	Contacts Settings more ▶
phx_University Main Point of Contact	3	Might, Diane	University reps who are the 3 main point of contacts. One for ASU, one for NAU and one for UofA	Mailing List	User and User Admin Only	Contacts Settings more ▶
phx_University Representatives	9		Mailing List All University Representatives	Mailing List	User and User Admin	Contacts Settings more ▶

1. Keep Scholar Groups Current

Here is a summary of the scholar related groups that the University Relations Chair or Webmaster should keep current.

chapter prefix_YYYY-YYYY Fiscal Year All Scholars (All current year Scholars)

chapter prefix_Scholar or Scholar Alum (All past and present scholars)

chapter prefix_University Main Point of Contact (University contacts that may need mailings)

chapter prefix_University Representatives (All administrators that may need mailings i.e. Dean, Presidents, etc.)

2. Confirm a Scholar Group is Correct!

Step 1: Login > CiviCRM > Select **Contacts** Tab on Black Line

Step 2: Select **Manage Groups**

Step 3: Scroll to the group of interest

Step 4: Select **Contacts**

Step 5: Confirm the contacts are correct for that group.

3. How to Remove Contacts from a Group

Step 1: Login > CiviCRM > Select **Contacts** Tab on Black Line

Step 2: Select **Manage Groups**

Step 3: Scroll to the group that contacts need to be removed from.

Step 4: Select **Contacts**

Step 5: Check the box(es) in front of the name(s) that need to be removed.

Step 6: Select **Actions**

Step 7: Select **Remove Contacts from Group**

Step 8: Select **View Selected Contacts**

Step 9: Once sure these contacts are correct, select **Remove from Group**.

Note: To be safe never delete a contact from the **Group** or the **Contact Record**. It is best to select **Remove** instead. Contact the PHX Webmaster or is.help@arcsfoundation.org immediately to restore the contact or **Login > Search > Advanced Search > Search in Trash > check the box in front of the record you want to restore > Actions > Restore Contacts**.

4. How to Add Contacts from One Existing Group to Another Existing Group

For an example of how to add contacts from one existing group to another existing group the “Scholar or Scholar Alum” group will be used as an example. To keep the chapter “Scholar or Scholar Alum” group current, the current fiscal year scholars can be added to this group. Once the current fiscal year scholars are added, both current and past scholars, are now represented in the “Scholar or Scholar Alum” group. Be sure the current fiscal year scholars group is already created before proceeding. See [Create Scholar Mailing Group](#).

Step 1: Login > CiviCRM > Select **Contacts** Tab on Black Line

Step 2: Select **Manage Groups**

Step 3: Scroll to group that has contacts you would like to add to another group. (i.e. phx_2018-2019 All Scholar (Smart Group))

Step 4: Select **Contacts**

Step 5: Select all or check the box(es) in front of the name(s) that need to be added to another existing group

Step 6: Select **Actions**

Step 7: Select **Add Contacts to Group**

Step 8: Make sure radio button **Add Contact to Existing Group** is selected

Step 9: - **Select Group** -

Step 10: Select the existing group to add the contact(s) to (i.e. Scholar or Scholar Alum group)

Step 11: Select **View Selected Contacts**.

Step 12: If certain these are the contacts to add to this existing group, select **Add to Group**.

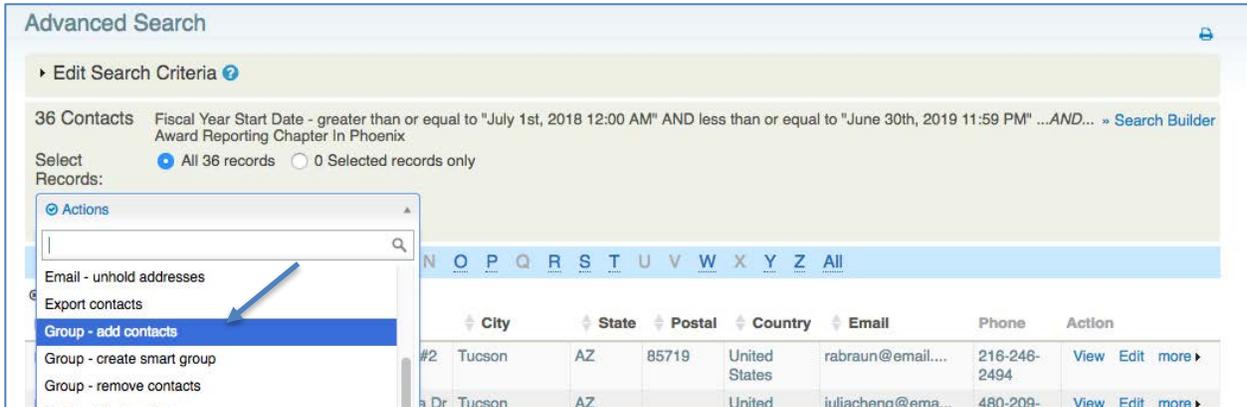
5. Add Individual(s) to Group via Advanced Search

Advanced Search is the easiest way to create groups or add contacts to existing groups. After selecting either multiple contacts or an individual, the following actions can be performed:

Group – add contacts: This allows either a group to be created or add contact(s) to an existing group. See screenshot below. The groups created by this method are not smart groups.

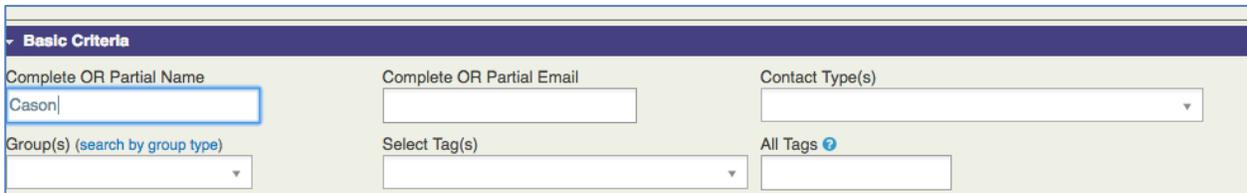
[Group – create smart group](#) – This method was described above when creating a new fiscal year scholar group. The method is the same for any smart group you wish to create.

Group – remove contacts – This method is a quick way to remove individuals from a group.



Step 1: Login > CiviCRM > Advanced Search

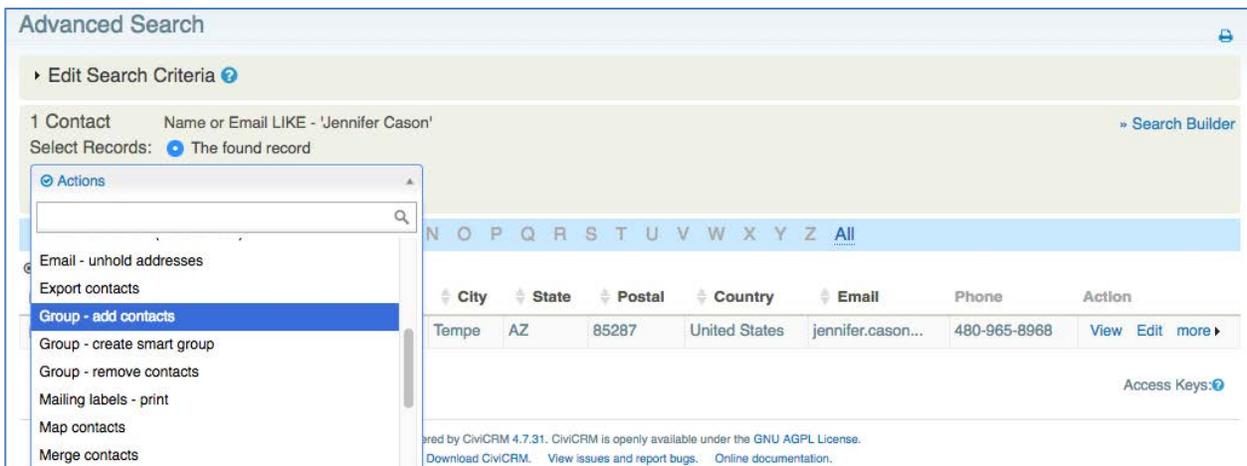
Step 2: Under the tab **Basic Criteria** enter the **Complete OR Partial** of the individual or group you want to either create a group or add to existing group. For example: Suppose you want to create a “University Point of Contacts” group to mail the graduate college representatives that your Chapter works with. In this example, the representatives are Cason, Voorhees and Watwood.



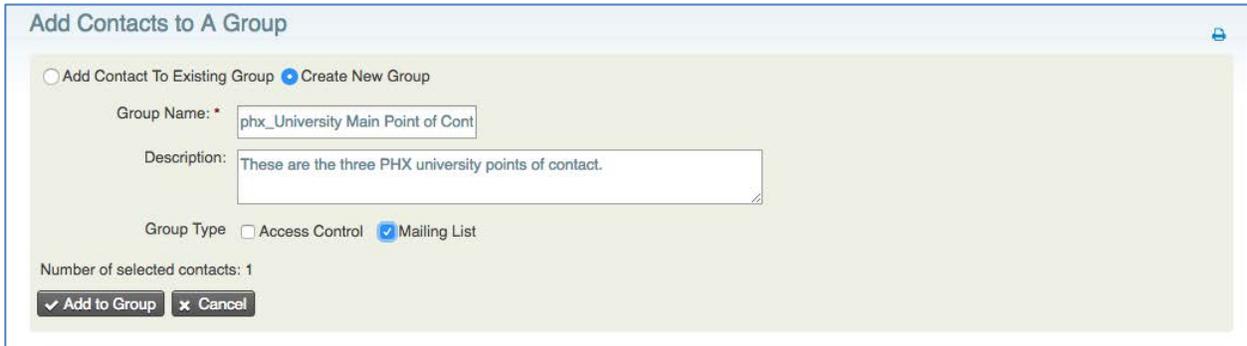
Step 3: Select Search

Step 4: Select the Actions dropdown menu

Step 5: Select Group – add contacts



Step 6: Since this group is not an existing one, select **Create New Group**. Enter **Group Name** and **Description** of the new group, check **Mailing List** and select **Add to Group**. See example in screenshot below.



Add Contacts to A Group

Add Contact To Existing Group Create New Group

Group Name: *

Description:

Group Type Access Control Mailing List

Number of selected contacts: 1

Step 7: The group is now an existing group so further contacts can either be added under **Advanced Search** or under **Contacts > Manage Groups** with the selected contact. The latter will be described. The next individual can be added to the existing group just created. Select **Contacts > Manage Groups** and scroll to the existing group and select **Contacts**.

Step 8: At the top of the page select the **Add Contacts to phx_University Main Point of Contacts**. Enter the last **Name** of the contact and select **Search**.



Add to Group: phx_University Main Point of Contacts

Find Contacts to Add to this Group

Name or Email

is...

in

with

Step 9: Check the contact and select **Add Contacts to phx_University Main Point of Contacts**



Add to Group: phx_University Main Point of Contacts

▸ Edit Search Criteria

3 Contacts Name or Email LIKE - 'Voorhees'

Select Records: All 3 records 1 Selected records only [Advanced Search](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Ⓜ Reset all selections

<input type="checkbox"/>	Name	Address	City	State	Postal	Country	Email	Phone	Action
<input checked="" type="checkbox"/>	Voorhees, Dorian	Assistant Dean Grad...	Tucson	AZ	85721	United States	vorhees@grad.a...	520-621-3471	View Edit more ▶
<input type="checkbox"/>	Voorhees, Joseph								View Edit more ▶
<input type="checkbox"/>	Voorhees, Ruth								View Edit more ▶

Step 10: Select Add to Group



Step 11: The next individual is now listed in the existing group under **Contacts > Manage Groups**.



Step 12: Continue to add contacts until the group is complete.