

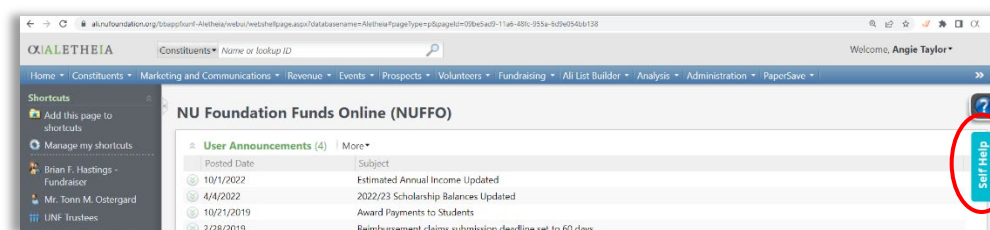
ALETHEIA_{CRM} **+NUFFO**

NUFFO 101: Fund Management Basics, My Fund Portfolio, NUFFO Fund Records and Whatfix

COURSE TYPE	COURSE OVERVIEW
Technology	This instructor-led course introduces new NU Foundation Funds Online (NUFFO) users to the basics of navigation within Ali CRM+NUFFO.
MODALITY	Participants learn fund management basic concepts such as fund type, purpose and authority, and how to log in to Ali CRM, access NUFFO, and understand individual fund information. This course emphasizes fund management basics, how to view fund and donor information in the My Fund Portfolio area of NUFFO, and how to use the system's built-in help tools.
Virtual Instructor-led Training	
DURATION	<p>"Aletheia" Ali CRM is the constituent relationship management (CRM) system for the University of Nebraska and its affiliates. Ali CRM is the central location for all data used for university advancement practices. This single platform fosters understanding and empowers collaborations among university and alumni association partners and foundation staff. Activities including fundraising, alumni relations, events management, and communications with university alumni, donors and friends will happen within Ali CRM.</p> <p>NU Foundation Funds Online (also known as the "NUFFO portal"), provides university partners with funds management information about foundation-held funds. Being able to capture the preferences of each individual and all interactions with those individuals -- and then having the ability to access that information anytime and anywhere -- allows the university to have the smartest conversations possible with our donors, alumni and friends, and provides a customized, consistent experience for each supporter of the university.</p> <p>Whatfix is a built-in companion tool that simplifies using Ali+NUFFO, provides on-demand assistance and tips, and guides you through tasks step by step. Google Chrome is the preferred browser for Ali+NUFFO. Prior to attending training, please visit the Chrome Store to install the foundation's Chrome extension.</p>
1 hour 15 min	
DELIVERY METHOD	
Online, via Zoom	
PREREQUISITES	
None	

Click **Add to Chrome** > **Add extension**.

Success is indicated when you see the **Self Help** tab on the edge of your browser window:



TARGET AUDIENCE

This course is designed for all new NUFFO users who have fund authority to view or manage foundation-held funds including all new NUFFO university partners and select development, finance and advancement staff at the foundation. It will also support university partners responsible for helping thank donors for their gifts.

LEARNING OBJECTIVES

- Understand Advancement activities: marketing, communications, alumni relations, fundraising
- Define CRM and understand:
 - Types of system access
 - Ali constituents: biographical and contact information, 1:1 interactions, events, communications
 - NUFFO: funds management and thank donors for their gifts
 - Who uses NUFFO? Why? What is especially important to know and what are my priorities with using the system?
- Understand **fund management basics**
 - Gift (and fund) criteria
 - [Subscribe to Gift Notifications](#)
 - [Fund authority](#): spending, viewing, designated, dual, vacant
 - [Fund types](#): permanently endowed, quasi-endowed, expendable
 - Fund Summary Memorandum
 - [Navigating Fund Summary Memos](#)

- Use codes – Capital improvement, Student support, Faculty support, Research, General
- Purpose codes - [guide](#)
- Sites – guide (**? ask Aaron**)
- Underutilized funds
 - Definitions
 - Red italics “red flags”
 - Spending plan (Notes)
- [Log in](#) to Ali CRM+NUFFO
- Identify key system components: home page, help, shortcuts and NUFFO areas:
 - My Fund Portfolio
 - Summary Reports
 - Student Fund Finder
- Identify **Whatfix** tools
 - Self Help
 - Beacons
 - Smart tips
 - Flows
 - Tip: options change depending upon which area you are in when you access Self Help to start the flow
- Review functionality of **My Fund Portfolio**
 - Search, filters, sort your funds list
- View a **NUFFO fund record**
 - Review the top half of a NUFFO fund record
 - Fund Information
 - Fund Summary Memorandum
 - Fund Balances (different for scholarships – money accrued since March 1 and updated only once annually; for scholarships refer *only* to Spendable balance, *not* Other Cash)

- Recent Activity, Funding Request Forms, Foundation Contacts
- Review tabs on lower part of NUFFO fund record including Financial Details, Notes, Fund Report Contacts, Student Award Criteria, Fund Authority and Donor Information
- Overview of Ali Community web site
 - How-to Guides and Learning Library
- Review foundation contacts:
 - servicedesk@nufoundation.org
 - fundmanagement@nufoundation.org
 - training@nufoundation.org

RESOURCES PROVIDED DURING TRAINING

- [NUFFO Essentials](#)

VIEW ADDITIONAL INFORMATION

- [NUFFO Quick Links](#)
- [NUFFO Forms](#)
- [NUFFO Training and References](#)
- [How to Request Foundation Funds](#)

NEXT SESSION

NUFFO 102's session focuses on:

- Summary Reports
- Student Fund Finder
- How to Request Foundation Funds