

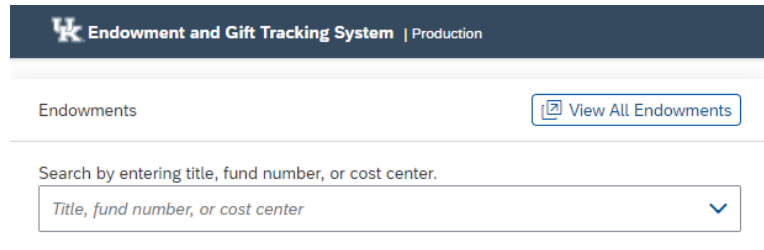
## EGATS – Getting Started

**Process:** The Endowment and Gift Account Tracking System (EGATS) dashboard can be used to search individual endowments or view a downloadable report of endowments to which the user has access. The navigation bar provides a secondary search field that is always accessible.

### Procedures

#### The EGATS Dashboard

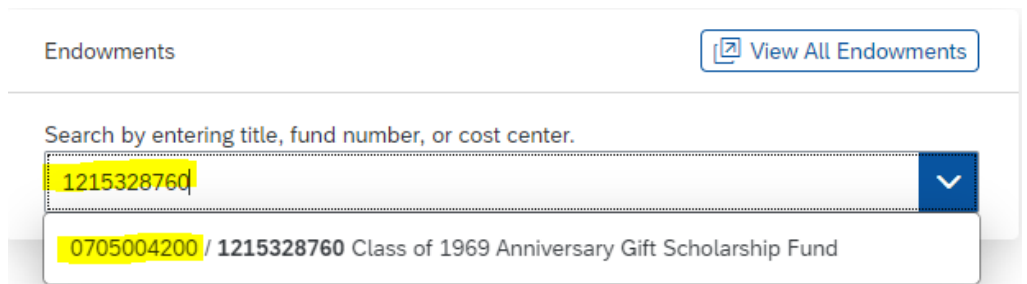
- The upper left portion of the EGATS dashboard contains the primary search bar. *This search bar is only viewable from the dashboard.*



- You can perform searches by fund title, fund number, or cost center number.
- The View All Endowments button allows you to view and Export Endowment Reports. Refer to the Quick Reference Guide [EGATS – Running Endowment Fund Reports](#) to see specific information that is included in the report in EGATS and how to filter, sort, and view the report.

#### Identifying linked cost centers/funds

In EGATS, spending distribution cost centers and fund numbers are linked. This allows you to search for an endowment fund number using the cost center number as a reference.



## Performing a search from the dashboard

- Place your cursor in the search field.
- Perform your search using the following methods:
  - Copy and paste the fund or cost center number directly into the field.

Search by entering title, fund number, or cost center.

0705221200 BLUEGRASS HOSPITALITY ASSOCIATION ENDOWE

0705221200 BLUEGRASS HOSPITALITY ASSOCIATION ENDOWE

0705221200 / 1215399370 BLUEGRASS HOSPITALITY ASSOCIATION ENDOWE

- Type any portion of the endowment or cost center number.

Search by entering title, fund number, or cost center.

2212

0705221200 BLUEGRASS HOSPITALITY ASSOCIATION ENDOWE

0705221200 / 1215399370 BLUEGRASS HOSPITALITY ASSOCIATION ENDOWE

543

0705047900 / 1215354360 Martin Luther King, Jr. Memorial

- Type any portion of the endowment name in the field.

Search by entering title, fund number, or cost center.

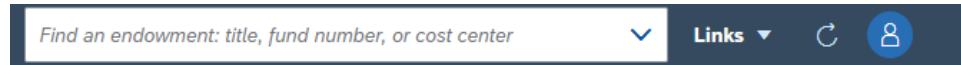
luther

0705047900 Martin Luther King, Jr. Memorial Endowment Fund

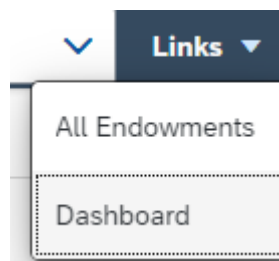
- Type the full endowment or cost center number into the field. **Note:** This method may cause a delay. For a faster search, use any of the other methods.

## The Navigation Bar

- The upper right portion of the EGATS website contains the navigation bar. *The navigation bar is always accessible.*



- If you are already on a fund detail screen and would like to search for a new fund, use the navigation search bar to perform a new search.
- Use the same searching methods as you would on the dashboard search bar.
- The *Links* dropdown can be used to view All Endowments or return to the EGATS Dashboard.



- The *Refresh* button is used to reload the EGATS page. This button is useful if you find that your data has not updated after entering a new fund in the navigation search bar.
- The Profile icon can be used to Sign Out of EGATS.



<b>EGATS Roles &amp; Responsibilities</b>	<p>Endowment and Gift Accounting</p> <ul style="list-style-type: none"><li>• Responsible for system administration including, but not limited to, the following:<ul style="list-style-type: none"><li>○ Monitoring and correcting fund validation messages.</li><li>○ Linking new funds with their spending distribution cost centers.</li><li>○ Uploading new governing documents.</li></ul></li></ul> <p>UK Philanthropy</p> <ul style="list-style-type: none"><li>• Maintains the endowment purpose section which feeds from the UK Philanthropy system.</li></ul> <p>Departments &amp; Business Officers</p> <ul style="list-style-type: none"><li>• Adds utilization or recruitment notes.</li><li>• Monitors funds and spending distribution cost centers.</li><li>• Tracks faculty appointment information.</li></ul>
<b>Questions</b>	<ul style="list-style-type: none"><li>• For questions, please contact Endowment and Gift Accounting: Email – <a href="mailto:endowment@uky.edu">endowment@uky.edu</a></li></ul>