

EGATS – Notes

- **Process:** A special feature of the Endowment and Gift Account Tracking System (EGATS) is the notes function in the system.

Procedures

General Note Information

- Notes are visible to **all** users with access to EGATS.
- The notes feature in EGATS allows users to:
 - Record explanations and other comments
 - Add action items used as simple reminders in the system
- Notes are associated with three areas in EGATS:
 - Endowment fund
 - Supported purpose (spending distribution cost center)
 - Faculty appointments
- At the present time, notes are intended for internal reference within EGATS and will not appear in most reports.

Access for Notes

- Notes can be entered, modified, or deleted by users with the following roles:
 - Unit Business Office - edit access
 - Philanthropy – edit access
 - EGATS administrators (Endowment Accounting)
- Only the original author of a note can update or delete a note. If a user is no longer available to change or delete a note, send an email to endowment@uky.edu to request the update.

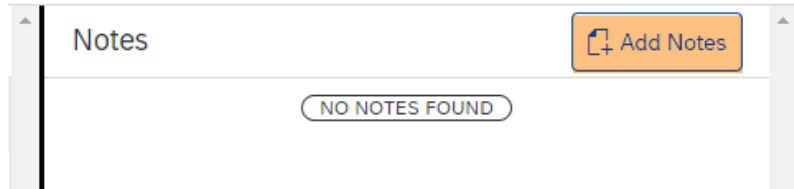
Types of Notes

- Determine the type of note to be added:
 - Endowment header - Note related to the overall endowment. Examples include information related to:
 - Endowment status
 - Origin or history
 - Unusual threshold terms for contributions
 - Supported Purpose Detail and Notes tab – Notes related to a particular supported purpose including utilization notes
 - Supported Purpose Appt & Recruitment tab – Notes related to professorship or chair recruitment. NOTE: It is very important to put notes related to the faculty appointments in this section for reporting.

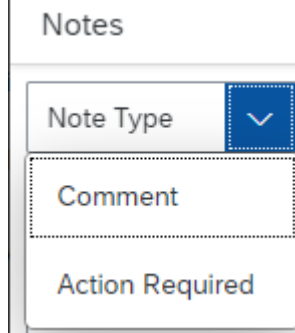
Adding Notes to the Endowment Fund

On the Endowment Detail Screen, notes may be added to the endowment fund.

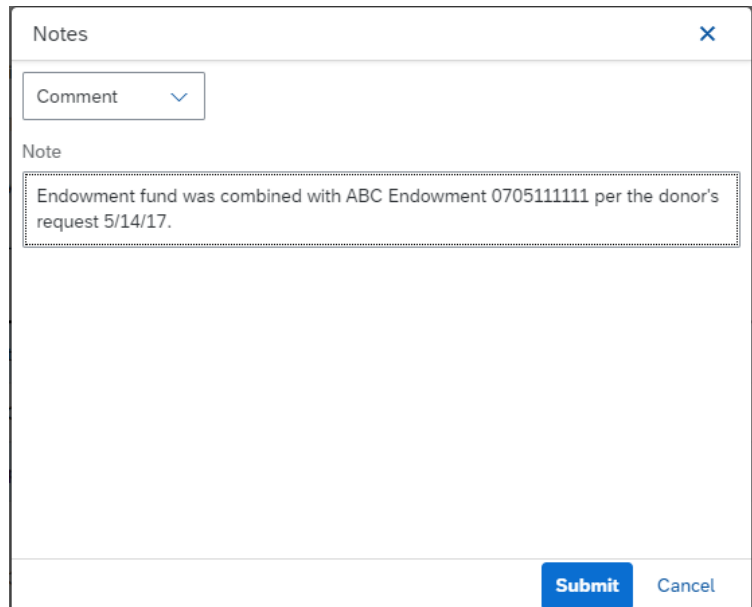
- In the upper right corner, click on Add notes.



- Click on the type of note:



- Comment – explains some history or other information related to the endowment.
 - Add the free form notation
 - Click Submit



Quick Reference Card – EGATS – Notes

- Action – a note can be added with a due date and a status for a task to be completed:
 - Add the note
 - Add the due date
 - Add the freefrom note
 - Click Submit

Notes X

Action Required ▾

Due Date

12/31/2022

Note

Check endowment fund to see if distribution percentages should be changed.

Submit Cancel

- The due date for the action is displayed, as well as the Area, userID of the person who added the note, and the date the note was added.

Notes Add Notes

12/31/2022	UFS	KEBOYD00	3/2/2022 4:07:14 PM	1
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Due Date

- When the task has been completed
 - Click on Mark Complete

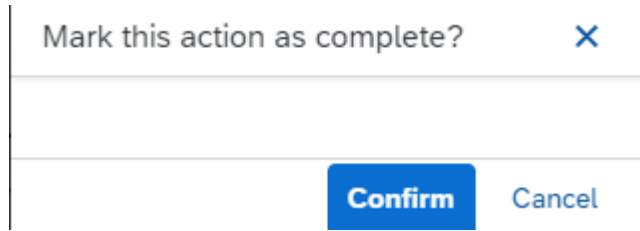
Notes Add Notes

12/31/2022	UFS	KEBOYD00	3/2/2022 4:07:14 PM	1
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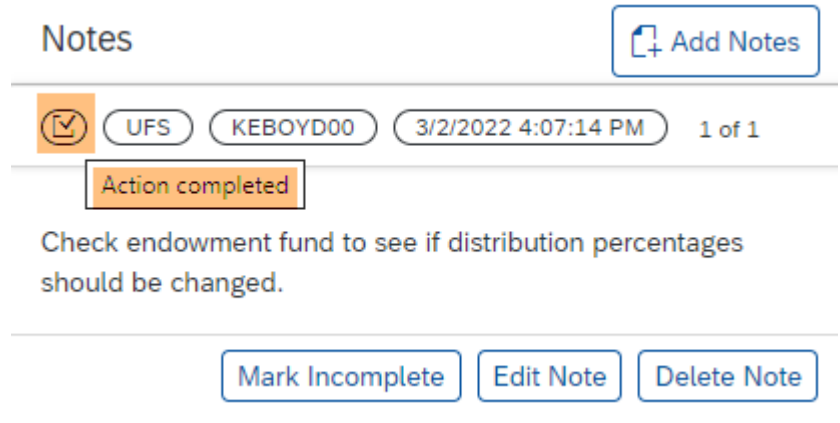
Check endowment fund to see if distribution percentages should be changed.

Mark Complete Edit Note Delete Note

- Confirm that the task is complete.



- The status has now changed to Action Complete



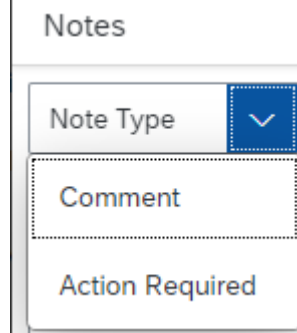
Adding Notes to the Supported Purpose

On the Endowment Detail Screen, notes may be added to the supported purpose under the Details & Notes menu option.

- In the lower right corner, click on Add notes.



- Click on the type of note:



Quick Reference Card – EGATS – Notes

- Comment – explains some history or other information related to the supported purpose.
 - Add the free form notation
 - Click Submit

Notes ✕

Comment ▾

Note

Accumulating spending distribution for cost center to purchase research equipment.

Submit Cancel

- Action – a note can be added with a due date and a status for a task to be completed:
 - Add the note
 - Add the due date
 - Add the freefrom note
 - Click Submit

Notes ✕

Action Required ▾

Due Date

6/30/2023 📅

Note

Check accumulated spending distribution to see if it meets cost of research equipment \$7,500.

Submit Cancel

- The due date for the action is displayed, as well as the Area, userID of the person who added the note, and the date the note was added.

The screenshot shows a 'Notes' interface with a header 'Notes' and an 'Add Notes' button. Below the header, there are several tags: a date '6/30/2023' with a bell icon, 'UFS', 'KEBOYD00', and '3/10/2022 1:47:13 PM', followed by '1 of 1'. A 'Due Date' label is positioned above the main text. The text reads: 'Check accumulated spending distribution to see if it meets cost of research equipment \$7,500.' At the bottom, there are three buttons: 'Mark Complete', 'Edit Note', and 'Delete Note'.

- When the task has been completed
 - Click on Mark Complete

This screenshot is identical to the previous one, but the 'Mark Complete' button is highlighted in orange, indicating it has been selected.

- Confirm that the task is complete.

The screenshot shows a confirmation dialog box with the title 'Mark this action as complete?' and a close button 'X'. Below the title is a horizontal line. At the bottom, there are two buttons: 'Confirm' (highlighted in blue) and 'Cancel'.

- The status has now changed to Action Complete

The screenshot shows the 'Notes' interface after the task is completed. The '6/30/2023' tag now has a checkmark icon. A label 'Action completed' is positioned above the main text. The text reads: 'Check accumulated spending distribution to see if it meets cost of research equipment \$7,500.' At the bottom, the buttons are 'Mark Incomplete', 'Edit Note', and 'Delete Note'.

Adding Notes to Appointment and Recruitment



On the Supported Purpose Appt & Recruitment tab, notes may be added regarding the professor or chair.

- General information
 - The date ranges for note types of Recruitment and Building Principal should be continuous and not overlap with each other or with appointments. Validation warning messages will indicate when this has occurred, notifying departments to make corrections.
 - Recruitment and Building Principal notes will appear on the Supported Purpose List report and may appear on utilization reports.
 - Recruitment and Building Principal notes for past periods should remain in EGATS for history.
- Click on Add Recruitment Info

Detail & Notes				
Appt. & Recruitment				
Appt. & Recruitment				Add Recruitment Info
Entry Type	Status	Period	Occupant	Academic Appointment / Recruitment Notes
Appointment	Inactive	7/1/2000 - 8/31/2011	Smith, George M., Ph.D. 00003768	Medicine / Physiology Associate Professor / Regular

- Add the date range for the recruitment note


Recruitment

 to 

- Add the recruitment type from the drop-down list
 - Building Principal - choose this option if the unit is building principal in the endowment fund prior to appointing the chair or professorship.
 - Recruiting – choose this option if the unit is actively recruiting for the position

- Other – Other notes the unit would like to add related to the appointment

Recruitment Type

Recruitment Type 

Other

Building Principal

Recruiting

- Enter freeform notes



Notes

Actively recruiting for Chair with Spinal Cord or Brain Injury specialty. Expect the recruitment process to take approximately one year.

- Click Submit to save the changes
- The note will now appear under the Appt & Recruitment menu option

Appt. & Recruitment

[Add Recruitment Info](#)



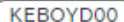

Entry Type	Status	Period	Occupant	Academic Appointment / Recruitment Notes
  Recruitment	Active	3/11/2022 - 6/30/2023	Recruiting	Actively recruiting for Chair with Spinal Cord or Brain Injury specialty. Expect the recruitment process to take approximately one year.

Editing a Note

Choose the appropriate note for which a change needs to be made:

- Endowment fund Note
 - Click on Edit Note

Notes [Add Notes](#)

 12/31/2022  UFS  KEBOYD00  3/2/2022 4:07:14 PM

Check endowment fund to see if distribution percentages should be changed.

[Mark Complete](#) [Edit Note](#) [Delete Note](#)

Quick Reference Card – EGATS – Notes

- Make any necessary changes and click submit

The screenshot shows a 'Notes' form with a close button (X) in the top right. Below the title is a dropdown menu labeled 'Action Required'. Underneath is a 'Due Date' field containing '1/31/2023'. A date picker calendar is open, showing the month of January 2023. The date '31' is highlighted in blue. To the right of the calendar, a text box contains the text '...n percentages should be changed.'. At the bottom right of the form are two buttons: 'Submit' and 'Cancel'.

- Supported Purpose Note on the Detail & Notes tab
 - Click on Edit Note

The screenshot shows a job detail page with several tabs: 'Detail & Notes', 'Appt. & Recruitment', 'Validations', 'FI Data - Cost Center', and 'Title & Type History'. The 'Detail & Notes' tab is active. The main content area includes fields for 'Prof To Chair: False', 'Amount: 0.00', 'Validation Status: Okay', 'Effective: 4/9/2000 - 12/31/9999 ACTIVE', 'Override Dept', 'CC Dept: 7H016 Spinal Cord & Brain Injury Res', 'Access Dept: 7H016 Spinal Cord & Brain Injury Res', 'Import Review: HIST', 'Allow Multiple Occupants', and 'Always Copy Title From Parent'. On the right side, there is a 'Notes' sidebar with an 'Add Notes' button. Below it, a note is displayed with a header 'UFS KEBOYD00 3/11/2022 10:49:12 AM 1 of 1' and the text 'Utilization of the Chair No 2 has been suspended until recruitment of an appropriate candidate can be completed.'. At the bottom of the note are 'Edit Note' and 'Delete Note' buttons.

- Make any necessary changes and click submit

The screenshot shows a 'Notes' form with a close button (X) in the top right. Below the title is a dropdown menu labeled 'Comment'. Underneath is a 'Note' field with a text area containing the text 'Utilization of the Chair No 2 supported purpose has been suspended until recruitment of an appropriate candidate can be completed.'. At the bottom right of the form are two buttons: 'Submit' and 'Cancel'.

- Appointment & Recruitment Note
 - Click on the pencil to the left of the note

Detail & Notes | **Appt. & Recruitment** | Validations | FI Data - Cost Center | Title & Type History

Appt. & Recruitment Add Recruitment Info

	Entry Type	Status	Period	Occupant	Academic Appointment / Recruitment Notes
	Recruitment	Active	3/11/2022 - 6/30/2023	Recruiting	Actively recruiting for Chair with Spinal Cord or Brain Injury specialty. Expect the recruitment process to take approximately one year.

Recruitment ×

3/11/2022 to 6/30/2023

Recruitment Type
Recruiting

Notes
Actively recruiting for Chair with Spinal Cord or Brain Injury specialty. Expect the recruitment process to take approximately one year. Preference for faculty with over 15 years experience.

Submit Cancel

- Make any necessary changes and click submit

Deleting a Note

If a note was entered in error, choose the appropriate note that needs to be deleted:

- Endowment fund Note
 - Click on Delete Note

Notes Add Notes

1/31/2023 UFS KEBOYD00 3/2/2022 4:07:14 PM

Check endowment fund to see if distribution percentages should be changed.

Mark Complete Edit Note **Delete Note**

○ Click to confirm that the note should be deleted.

Delete note? ×

Check endowment fund to see if distribution...

Confirm Cancel

- Supported Purpose Note on the Detail & Notes tab
 - Click on Delete Note

Detail & Notes Appt. & Recruitment Validations FI Data - Cost Center Title & Type History

Prof To Chair: False Amount: 0.00 Validation Status: Okay

Effective: 4/9/2000 - 12/31/9999 ACTIVE

Override Dept CC Dept: 7H016 Spinal Cord & Brain Injury Res

Access Dept: 7H016 Spinal Cord & Brain Injury Res

Import Review: HIST

Allow Multiple Occupants Always Copy Title From Parent

Notes Add Notes

UFS KEBOYD00 3/11/2022 10:49:12 AM 1 of 1

Utilization of the Chair No 2 supported purpose has been suspended until recruitment of an appropriate candidate can be completed.

Edit Note Delete Note

- Click confirm to delete the note

Delete note? X

Utilization of the Chair No 2 supported purpose...

Confirm Cancel

- Appointment & Recruitment Note
 - Click on the trash can to the left of the note

Appt. & Recruitment Add Recruitment Info

Entry Type	Status	Period	Occupant	Academic Appointment / Recruitment Notes
Recruitment	Active	3/11/2022 - 6/30/2023	Recruiting	Actively recruiting for Chair with Spinal Cord or Brain Injury specialty. Expect the recruitment process to take approximately one year. Preference for faculty with over 15 years experience.

- Click confirm to delete the recruitment entry

Delete recruitment entry? X

Recruitment / Active / 03/11/2022-03/11/2022 / Recruiting

Confirm Cancel

Questions

- For EGATS questions please contact the following:
Email – endowment@uky.edu
- For faculty appointment questions, please contact the Office of Faculty Advancement at facultyadv@uky.edu.