



Need Help?

DART HELP (Procedures, Training, FAQs, Updates)
<http://dart.dev.umich.edu/>

ODU-Development Services (Report creation, data analysis, gifts and development records administration)
<http://services.dev.umich.edu/>
Phone: (734) 647-7777

ITS Service Center (Technical support, for example, navigation, connectivity, system errors)

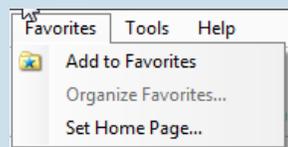
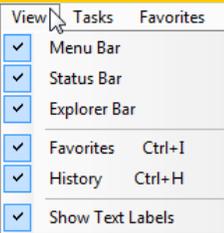
Phone: (734) 764-HELP (4-4357)
between 7 AM and 6 PM Monday through Friday

E-mail: 4Help@umich.edu

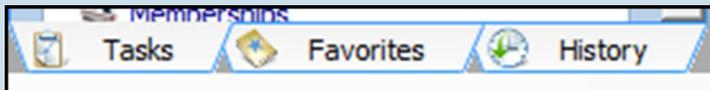
Website: <http://its.umich.edu/help/>

Navigation Tips

- For easier navigation, turn on Text Labels, Menus and Tabs by choosing View in the Menu bar and checking all the options shown.



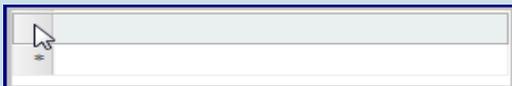
- Save a Constituent Record or a page you use often as a **Favorite** on your Home Page by navigating to the record and choosing Favorites > Add to Favorites.



- Use the **Tasks** tab in the explorer bar to see Tasks that can be performed, the View As and the More information links.
- Use the **History** tab in the explorer bar to quickly access the last ten pages you've visited. Make sure History is enabled by choosing View > history.

Helpful Hints

- Press **F3** to insert today's date into a date field.
- Boxes with yellow shading are required fields.
- Because the lists can be extremely long, use the magnifying glass icon, rather than the drop down arrow, to search for sites or designations.
- If you are having problems saving after entering data, you may need to delete empty rows. Move your mouse over the left most area of the row and click the delete key on your keyboard.



- Check your filters:** Many of the tabs on the Constituent & Revenue record allow you to select specific criteria to narrow the list of information displayed. You may select multiple filter options. Click the Refresh button to display the newly selected information.
- You can copy and paste information in DART. Highlight the information you wish to copy and press Ctrl + C and then Ctrl + V to paste. You can also copy data from another source, such as a Word document, into DART.

Customize My Home Page

- Click the **Home** icon on the Navigation bar.
- Click **Customize**. The Customize home page window opens.
- Select **Use this layout** to create a customized home page.
- Choose a **Functional area**. The tasks associated with that area will appear in the **Task** column.
- Select the **Tasks** to include on your home page.
- Click **Display favorites** to show your favorites on your home page if you have Favorites saved.
- Click **Save**.



Search Tips

Searches are not case-sensitive.

Wild card characters can be used to broaden search criteria:

- Asterisk (*) or percent sign (%) can take the place of a group of characters. For example, if a name ends with "son", type *son or %son.
- Question mark (?) or underscore (_) can take the place of an individual character. For example, if a name is Smith or Smyth, type Sm?th or Sm_th.

When searching for an individual constituent, unselect **Organizations** and **Groups** in the **Advanced search options** to narrow your results.

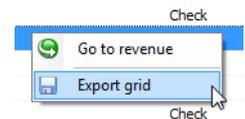
Use the **Advanced Search Options** to select *Include deceased* and *Include inactive* if you're not finding an individual or transaction you're searching for.

Widen the columns in the search results to easily view the data.

Export Grid

DART allows you to export lists of data to Excel. Only data that is in a list (not including Search results) can be exported. This includes Revenue History and Interactions.

- Locate the data you would like to export.
- Right click the mouse anywhere in the data list.
- A selection box will appear.
- Select **Export grid**.
- Save the file with a name of your choice.
- The file will open in Excel.



Important note: When exporting revenue data, be aware that payments to a pledge and the pledge itself are included in the data and should be identified to avoid double-counting.