Development Fund Financial Reports (TAS)

1. Go to: http://tas.osu.edu/

2. Click on Training

3. Take necessary University training
   - Non Columbus Based Employees Training in BuckeyeLearn
     1. OSU Carmen: Institutional Data Policy
     2. Gramm-Leach-Bliley Act (GLBA)
     3. The Ohio State University’s Family Education Rights and Privacy Act training
     4. TAS – Protected Health Information (PHI)
   - Institutional Data Policy Training
     In order to gain access to University Advancement systems, all users must complete the Institutional Data Policy training on BuckeyeLearn within one (1) month of hire date, or from the date being granted access to University Advancement data. Information on how to enroll in the training can be found at https://busfin.osu.edu/university-business/financial-training.

4. After completing the prerequisite trainings, you must contact the Advancement IT Service Center (614-292-8324) and request access to Fund View. You will then receive an email with log on instructions for TAS once access is granted.

5. You will receive an email (about 2 weeks) from University Advancement with information on the system. If you don’t receive and email, contact 2tech@osu.edu and ask for an update. If you are not based in Columbus, remind them that in person training is not required for you.

Fund View Search Overview
There are three main reports that you may access. Only the GL Post by Dept Org Report is required for Reconciliation, but the other two reports are useful for tracking deposits and donor information. Use the Documents link at TAS.osu.edu to find instructions on accessing these reports if you run into trouble.

- **GL Post by Dept Org Report** – download this report monthly and compare to your 4OS-91 report to make sure all of the donor money was transferred to your Fund. This is done 180 days after donation.
- **Fund View Search** – this information allows you to see fund balances as well as amounts in the 180 day hold.
- **Gift Memo Support Report** – this report can be used to send thank yous and recognize donor contributions as they come in. You should run this at least monthly.

Questions about this can be directed to CFAESBusiness@osu.edu.