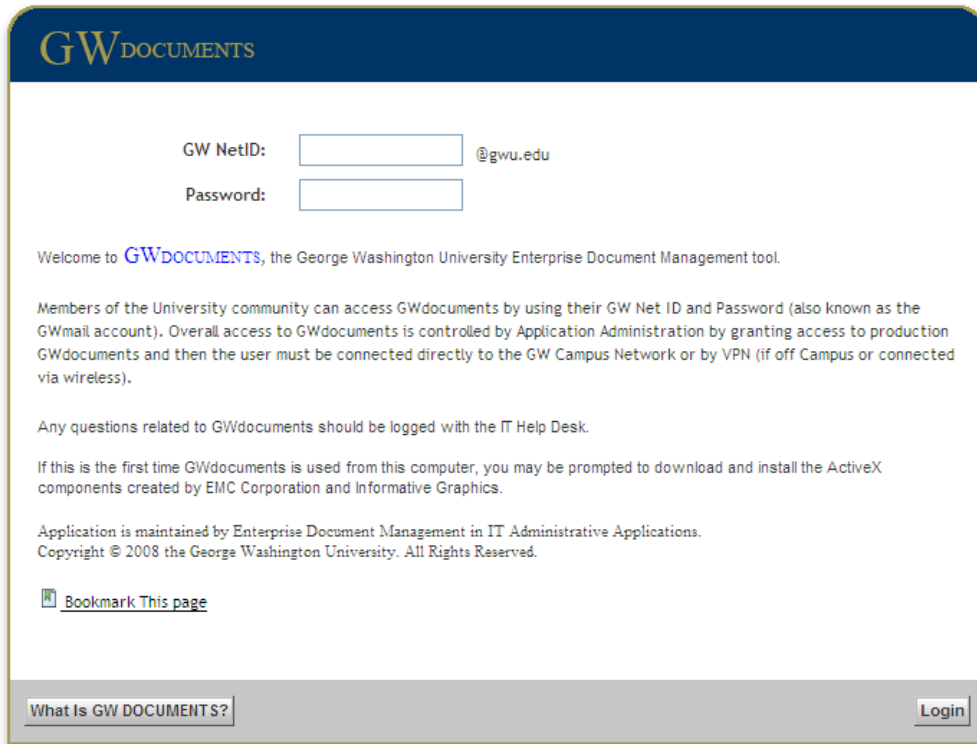


Accessing Endowment Tracking System (ETS) Reports on GWdocuments

Please follow the instructions below to access ETS Reports through GWdocuments. If you do not see your normal reports or have any problems, please contact Leah Kaba at lkaba@gwu.edu or (571) -553-1910 so she can identify and correct any access issues.

Login to GWdocuments at <https://gwdocuments.gwu.edu/GWdocuments/>



GWDOCUMENTS

GW NetID: @gwu.edu

Password:

Welcome to **GWDOCUMENTS**, the George Washington University Enterprise Document Management tool.

Members of the University community can access GWdocuments by using their GW Net ID and Password (also known as the Gmail account). Overall access to GWdocuments is controlled by Application Administration by granting access to production GWdocuments and then the user must be connected directly to the GW Campus Network or by VPN (if off Campus or connected via wireless).

Any questions related to GWdocuments should be logged with the IT Help Desk.

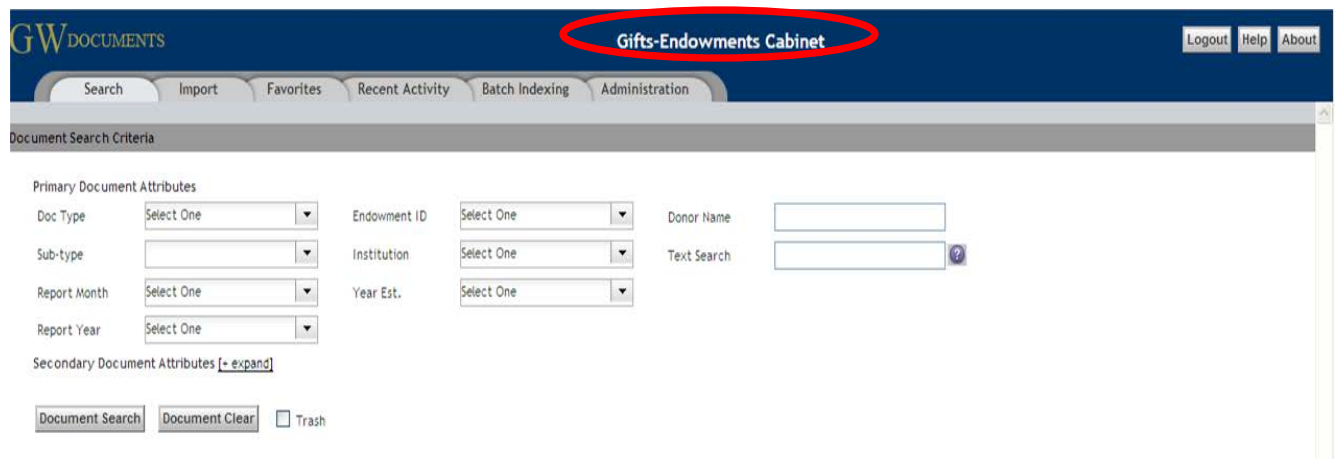
If this is the first time GWdocuments is used from this computer, you may be prompted to download and install the ActiveX components created by EMC Corporation and Informative Graphics.

Application is maintained by Enterprise Document Management in IT Administrative Applications.
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Optional: If you are a member of multiple cabinets, select the **“Gifts-Endowments Cabinet”** from the drop down menu in the upper right hand corner.



GWDOCUMENTS

Gifts-Endowments Cabinet [Logout](#) [Help](#) [About](#)

[Search](#) [Import](#) [Favorites](#) [Recent Activity](#) [Batch Indexing](#) [Administration](#)

Document Search Criteria

Primary Document Attributes

Doc Type: Endowment ID: Donor Name:

Sub-type: Institution: Text Search:

Report Month: Year Est.:

Report Year:

Secondary Document Attributes [+ expand]

Trash

**If you are only a member of this cabinet, you will not have a drop down menu and can skip this step, as you will already be in the Gifts-Endowments Cabinet.*

Next, you should automatically be taken to the **“Search”** tab. If you have any issues or do not see the search criteria as shown below, click on the **“Search”** tab.

Primary Document Attributes

Doc Type	Select One	Endowment ID	Select One	Donor Name	<input type="text"/>
Sub-type		Institution	Select One	Text Search	<input type="text"/>
Report Month	Select One	Year Est.	Select One		
Report Year	Select One				

Secondary Document Attributes [+ expand]

Trash

There are various ways to pull up reports under the **Document Search Criteria** section. This document shows three examples.

Example 1 - To see all reports available:

- For the attribute “**Endowment ID**”, click on the arrow to the right and a drop down menu will appear. Select → “**ENDOW REPORTS**”.

The screenshot shows the 'GW DOCUMENTS Gifts-Endowments Cabinet' interface. At the top, there is a navigation bar with tabs for Search, Import, Favorites, Recent Activity, Batch Indexing, and Administration. Below this is the 'Document Search Criteria' section. Under 'Primary Document Attributes', there are several dropdown menus: 'Doc Type' (Select One), 'Sub-type' (empty), 'Report Month' (Select One), 'Report Year' (Select One), 'Endowment ID' (set to 'ENDOW REPORTS'), 'Institution' (Select One), and 'Year Est.' (Select One). To the right are 'Donor Name' and 'Text Search' input fields. Under 'Secondary Document Attributes [+ expand]', there are three buttons: 'Document Search' (highlighted with a red circle), 'Document Clear', and a 'Trash' checkbox.

Example 2 - To see only one type of report, such as Corpus, Description, Payout Rollforwards, or Payout Drawdowns:

- For the “**Doc Type**” select → “**Reports**”.
- Enter the report or “**Sub-Type**” → “**Payout Rollforward**” (or whichever report you want to view).

The screenshot shows the 'GW DOCUMENTS' interface with a navigation bar containing 'Search', 'Import', 'Favorites', 'Recent Activity', 'Batch Indexing', and 'Administration'. Below this is the 'Document Search Criteria' section. A red circle highlights the 'Primary Document Attributes' area. The 'Doc Type' dropdown is set to 'Reports'. The 'Sub-type' dropdown is open, showing a list of options: 'Select One', 'Corpus', 'Description, Units, Book and Market Values', 'Gelman Library', 'Gifts', 'Payout Drawdowns', 'Payout Rollforwards', and 'Shapiro & Bender'. The 'Payout Rollforwards' option is highlighted. Other search criteria include 'Endowment ID', 'Institution', 'Est.', 'Donor Name', and 'Text Search', each with a 'Select One' dropdown or a text input field.

Example 3 - To see reports for a specific time period:

- Either set the “Endowment ID” to → “ENDOW REPORTS” OR “Doc Type” to → “Reports”
- Then enter the “Report Month” and/or “Report Year” to show reports for a specific month and/or year.

The screenshot shows the 'Document Search Criteria' section of the 'Gifts-Endowments Cabinet' interface. Under 'Primary Document Attributes', the 'Endowment ID' dropdown is set to 'ENDOW REPORTS', 'Report Month' is '06', and 'Report Year' is '2010'. These three fields are circled in red. Other fields include 'Doc Type' (Set to 'Select One'), 'Sub-type' (Set to 'Select One'), 'Institution' (Set to 'Select One'), 'Year Est.' (Set to 'Select One'), 'Donor Name' (Text input), and 'Text Search' (Text input with a help icon). At the bottom, there are buttons for 'Document Search', 'Document Clear', and a 'Trash' checkbox.

OR

The screenshot shows the 'Document Search Criteria' section of the 'Gifts-Endowments Cabinet' interface. Under 'Primary Document Attributes', the 'Doc Type' dropdown is set to 'Reports', 'Report Month' is '06', and 'Report Year' is '2010'. These three fields are circled in red. Other fields include 'Endowment ID' (Set to 'Select One'), 'Sub-type' (Set to 'Select One'), 'Institution' (Set to 'Select One'), 'Year Est.' (Set to 'Select One'), 'Donor Name' (Text input), and 'Text Search' (Text input with a help icon). At the bottom, there are buttons for 'Document Search', 'Document Clear', and a 'Trash' checkbox.

It is important to note that reports are organized by calendar year.

- *For example, the June 2010 reports are under “Report Month” → 06 and “Report Year” → 2010. Similarly, the January 2011 reports would be under the headings “Report Month” → 01 and “Report Year” → 2011.*
- *An entire calendar year could be viewed by only selecting the year → 2010 (and not specifying a month). This would show all reports from January 2010 through December 2010.*
- *All June reports could be viewed by only selecting the month → 06 (and not specifying a year). This would show June reports for multiple years.*

Once all the parameters are entered, click **“Document Search”** at the bottom of the page.

The screenshot shows the 'GW DOCUMENTS' interface for the 'Gifts-Endowments Cabinet'. At the top, there is a navigation bar with buttons for 'Search', 'Import', 'Favorites', 'Recent Activity', 'Batch Indexing', and 'Administration'. Below this is the 'Document Search Criteria' section, which includes several input fields and dropdown menus for filtering search results. The 'Document Search' button is circled in red.

Primary Document Attributes

Doc Type	Select One	Endowment ID	ENDOW REPORTS	Donor Name	
Sub-type		Institution	Select One	Text Search	
Report Month	Select One	Year Est.	Select One		
Report Year	Select One				

Secondary Document Attributes [- expand]

Trash

When the search is complete, a listing, similar to the screen below will appear showing your reports. By clicking on the **Excel Icon** on the left, you can open the file.

The screenshot shows a web application interface for 'Gifts-Endowments Cabinet'. At the top, there are navigation tabs for 'Search', 'Import', 'Favorites', 'Recent Activity', 'Batch Indexing', and 'Administration'. Below these is a 'Documents' section with a 'File' dropdown menu. The main area displays a table of reports with columns: Doc Type, Sub-type, Endowment ID, Donor Name, Institution, Report Month, Report Year, Year Est., and Doc Name. Each row includes an Excel icon in the 'File' column, which is circled in red in the first row. The table lists various reports for different institutions like Budget, CCAS, Donor Relations, ESIA, and EVPAA, all dated June 2010.

File	Doc Type	Sub-type	Endowment ID	Donor Name	Institution	Report Month	Report Year	Year Est.	Doc Name
	Reports	Payout Rollforwards	ENDOW REPORTS	Budget	Budget	06	2010		Jun 10 Payout Rollforward - Budget.xls
	Reports	Description, Units, Book and Market Values	ENDOW REPORTS	Budget	Budget	06	2010		Jun 10 Description - Budget.xls
	Reports	Gifts	ENDOW REPORTS	Budget	Budget	06	2010		Jun 10 Gift Report - Budget.xls
	Reports	Corpus	ENDOW REPORTS	Budget	Budget	06	2010		Jun 10 Corpus - Budget.xls
	Reports	Description, Units, Book and Market Values	ENDOW REPORTS	CCAS	CCAS	06	2010		Jun 10 Description - U_CC.xls
	Reports	Gifts	ENDOW REPORTS	CCAS	CCAS	06	2010		Jun 10 Gift Report - U_CC.xls
	Reports	Payout Rollforwards	ENDOW REPORTS	CCAS	CCAS	06	2010		Jun 10 Payout Rollforward - U_CC.xls
	Reports	Payout Drawdowns	ENDOW REPORTS	CCAS	CCAS	06	2010		Jun 10 Payout Drawdown - U_CC.xls
	Reports	Gifts	ENDOW REPORTS	Donor Relations	Donor Relations	06	2010		Jun 10 Gift Report - Donor Relations.xls
	Reports	Payout Rollforwards	ENDOW REPORTS	Donor Relations	Donor Relations	06	2010		Jun 10 Payout Rollforward - Donor Relati...
	Reports	Payout Drawdowns	ENDOW REPORTS	Donor Relations	Donor Relations	06	2010		Jun 10 Payout Drawdown - Donor Relations...
	Reports	Description, Units, Book and Market Values	ENDOW REPORTS	Donor Relations	Donor Relations	06	2010		Jun 10 Description - Donor Relations.xls
	Reports	Description, Units, Book and Market Values	ENDOW REPORTS	ESIA	ESIA	06	2010		Jun 10 Description - U_ESIA.xls
	Reports	Gifts	ENDOW REPORTS	ESIA	ESIA	06	2010		Jun 10 Gift Report - U_ESIA.xls
	Reports	Payout Drawdowns	ENDOW REPORTS	ESIA	ESIA	06	2010		Jun 10 Payout Drawdown - U_ESIA.xls
	Reports	Payout Rollforwards	ENDOW REPORTS	ESIA	ESIA	06	2010		Jun 10 Payout Rollforward - U_ESIA.xls
	Reports	Payout Rollforwards	ENDOW REPORTS	EVPAA	EVPAA	06	2010		Jun 10 Payout Rollforward - U_EVPAA.xls
	Reports	Gifts	ENDOW REPORTS	EVPAA	EVPAA	06	2010		Jun 10 Gift Report - U_EVPAA.xls
	Reports	Payout Drawdowns	ENDOW REPORTS	EVPAA	EVPAA	06	2010		Jun 10 Payout Drawdown - U_EVPAA.xls
	Reports	Description, Units, Book and Market Values	ENDOW REPORTS	EVPAA	EVPAA	06	2010		Jun 10 Description - U_EVPAA.xls