UNIVERSITY OF DAYTON ADVANCEMENT IT

Adv MarComm Project Request Training Guide

OCTOBER 29, 2024

Version Number 1.5

Contents

Purpose

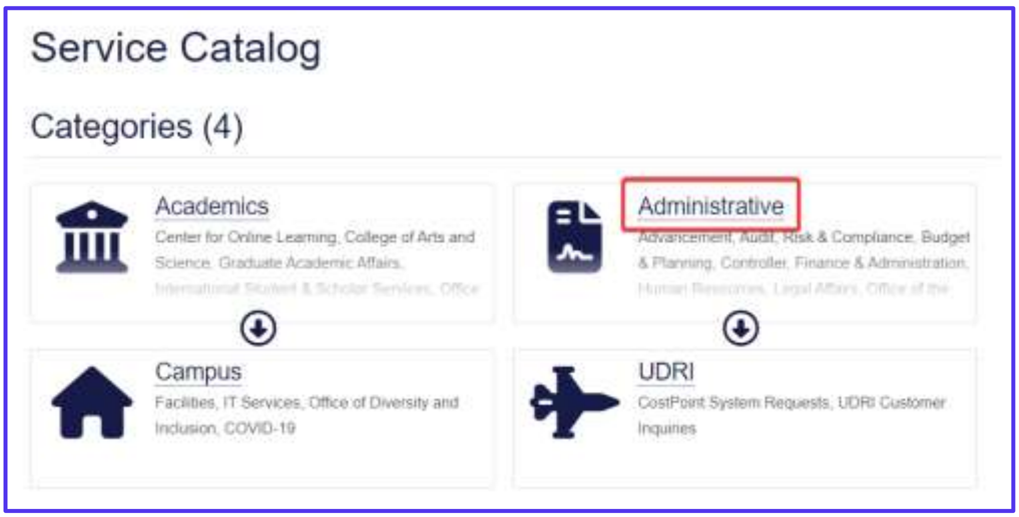
The purpose of this document is to help guide Advancement users through the updated process of submitting an Advancement Project Request TDX. This guide will walk you through the process of creating the ticket, show the fields, and give a brief explanation of what each field is asking.

Accessing the Adv MarComm Project Request Form

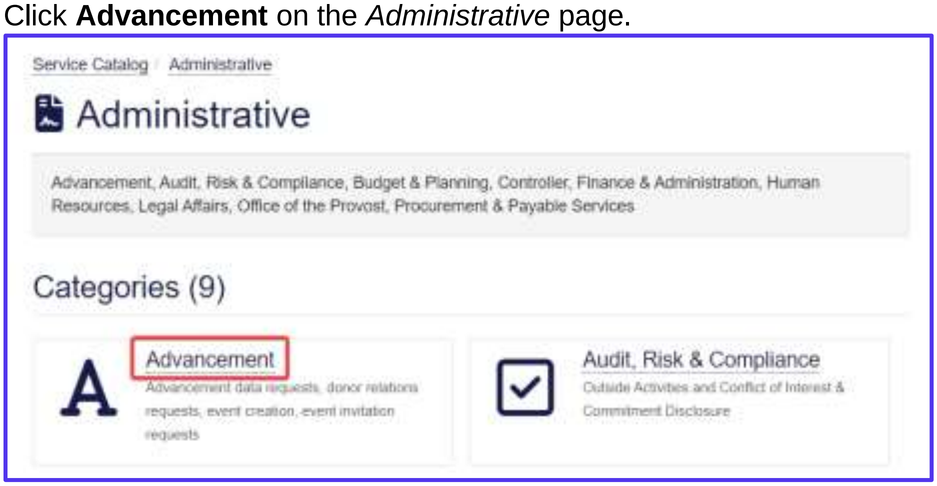
In order to get to the location in the TeamDynamix Service Catalog, you must first visit the following webpage: go.udayton.edu/servicecatalog. You should be familiar with this page already, but if not, welcome to the UD Service Catalog! This main page is where you will find knowledge articles relating to UD services, information about your current and past requests, and it is where you can place a service request. The following will walk you through the process of getting to where you need to go to submit your project request.

1. Click **Services** in the area beneath the UD logo on the main Service Catalog page.

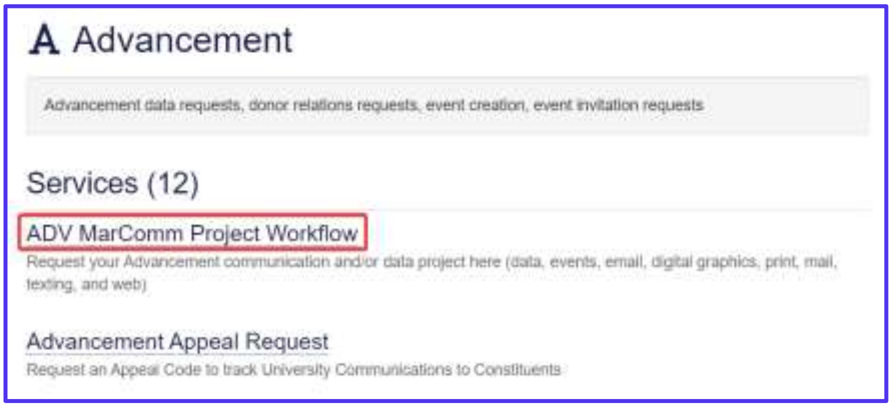
2. Click **Administrative** on the *Service Catalog* page.



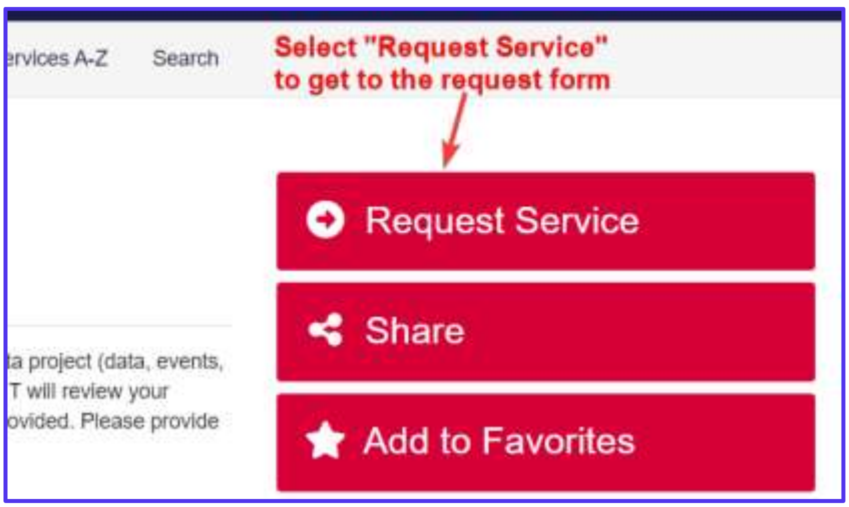
3. Click **Advancement** on the *Administrative* page.



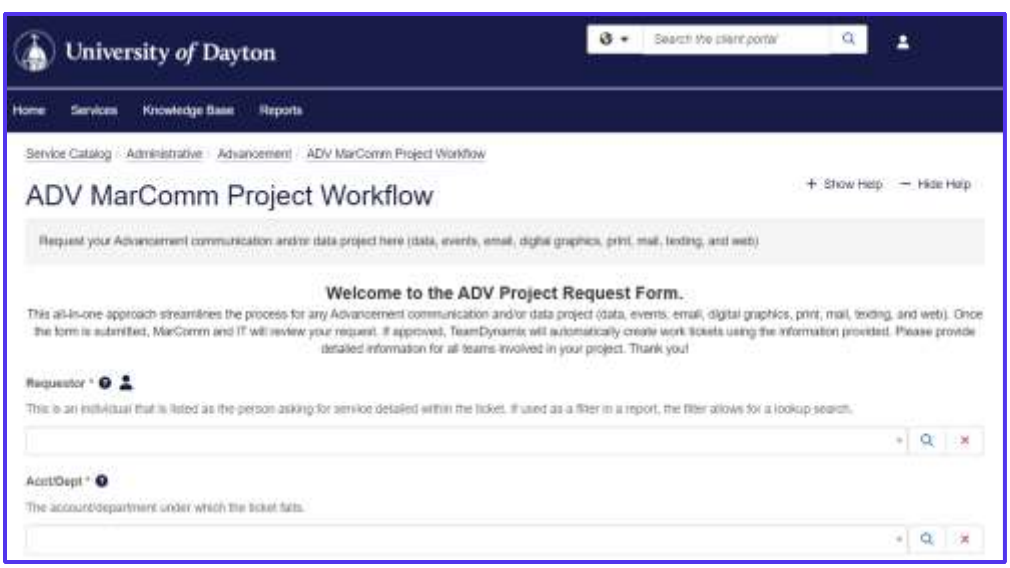
4. Click **Adv MarComm Project Workflow** on the *Advancement* page.



5. Click the red **Request Service** button on the right side of the *Adv MarComm Project Workflow* page.



Your screen should look very similar to the following:

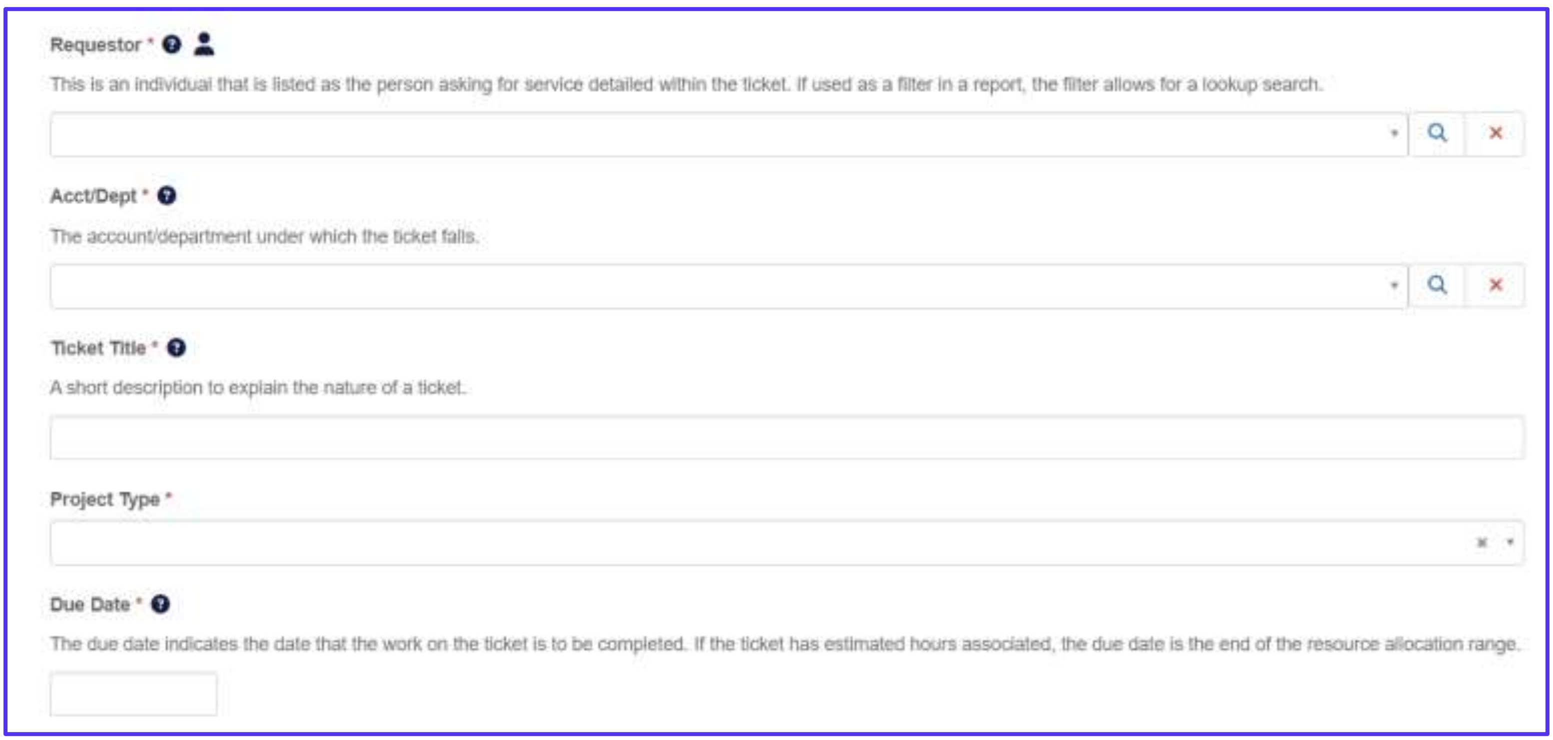


Default Fields

The image below shows the default top section of the request. The initial top and bottom sections are the same for all requests regardless of the chosen project type. The type and number of fields change farther down the ticket form depending on your selections in certain fields

Top Fields

- **Requestor** – The *Requestor* field is required and automatically fills in with your name.
- **Acct/Dept** – The Acct/Dept field is required and auto-populates based on the part of the division you work in.
- **Ticket Title** – The *Ticket Title* field is required, and it is the unique, human-identifiable name that helps techs and Requestors differentiate between tickets.
- **Project Type** – The *Project Type* field, also required, is the crux of the rest of the ticket. The choice that is made here will determine which fields appear further down on the request page. The project types are the following: Web Update, Texting (future feature), Alumni Event, Special Event, Email, Design, Mail or Print, and Data Request.
- **Due Date** – This required field indicates when work on the project is to be completed. This is the be-all, end-all date that the ticket should be completed.


Requestor *

This is an individual that is listed as the person asking for service detailed within the ticket. If used as a filter in a report, the filter allows for a lookup search.

Acct/Dept *

The account/department under which the ticket falls.

Ticket Title *

A short description to explain the nature of a ticket.

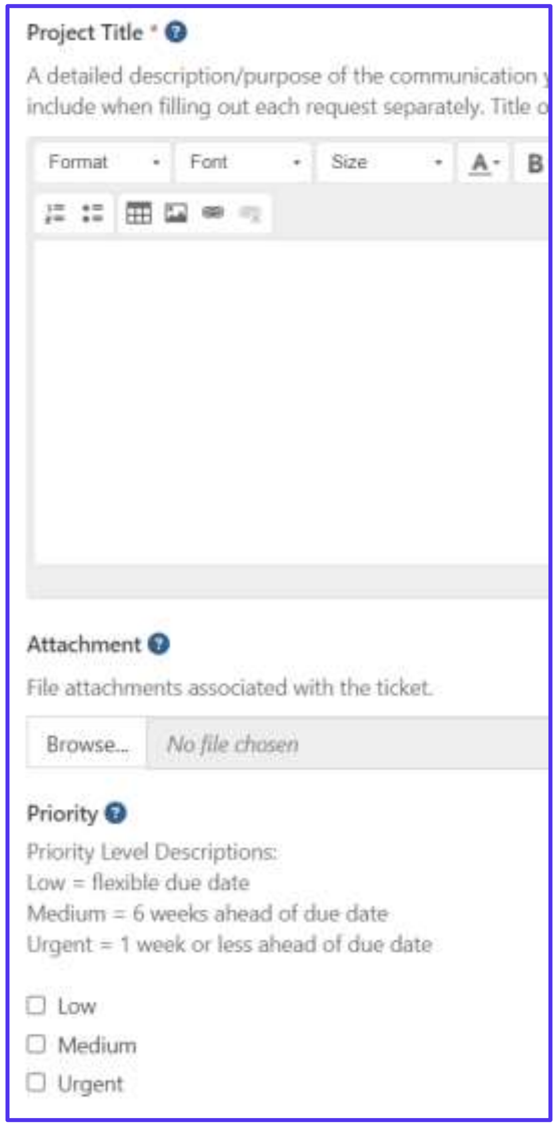
Project Type *

Due Date *

The due date indicates the date that the work on the ticket is to be completed. If the ticket has estimated hours associated, the due date is the end of the resource allocation range.

Bottom Fields

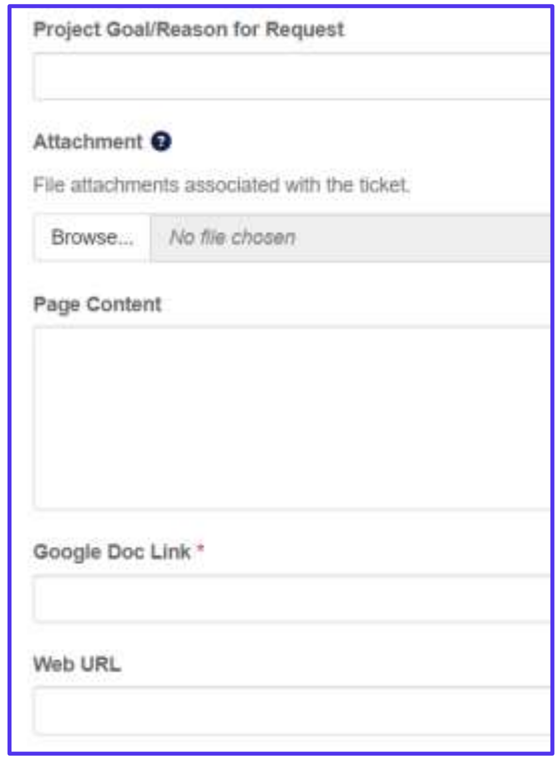
Each request page has these fields available near the bottom. Once you select the Project Type, the custom fields appear between *Project Title* and *Attachment*.



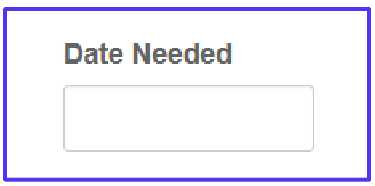
- **Project Title** – The importance of this field changes depending upon the chosen project type. If you select a project requiring a new webpage, this will appear at the very top of the browser screen. For an event, this is used for the title of the event page. Specific projects have special naming conventions that are mentioned in the help text.
- **Attachment** – Not a required section, but it is here in case you want to attach a document, spreadsheet, or other file.
- **Priority –** Important but not required, this field defaults to 'Medium' if you do not select anything. This allows for the technicians working on the request to understand how important something is.

Webpage

The custom fields that are available for the Webpage project type are discussed in this section.

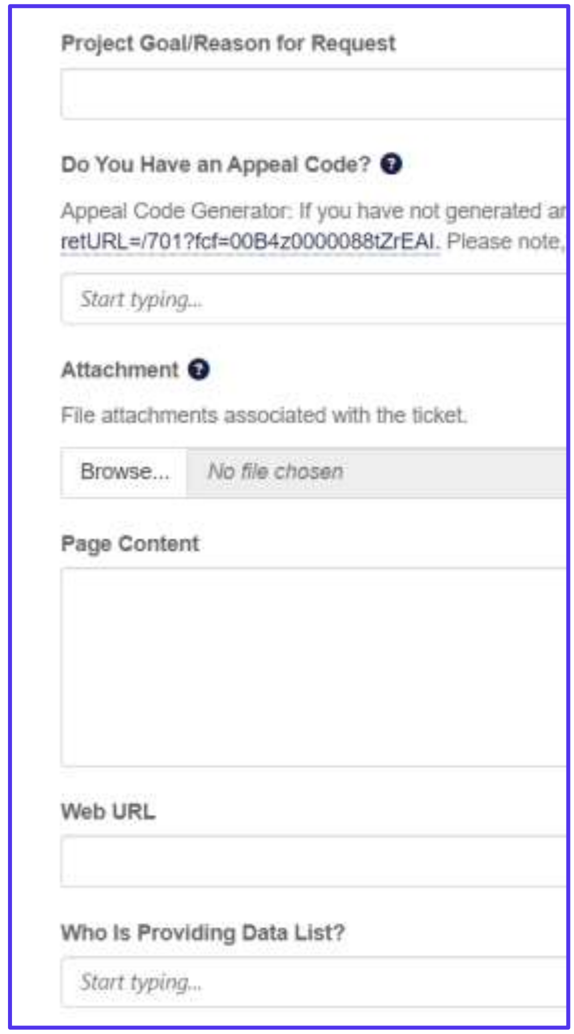


- **Project Goal/Reason for Request** – Not required, this field, allows you to briefly explain the goal or reason for requesting this project.
- **Page Content** – Enter whatever content that you want to be included on the webpage in this large text input field.
- **Google Doc Link** – Provide the link to the Google document that this request is associated with in this required field.
- **Web URL** – Enter the URL of either a specific webpage to be updated or where you want the new page to go.
- **Date Needed** – This is the date that the page needs to be live.



Texting (future feature)

The custom fields for the Texting project type are explained in this section. The Texting feature will be made available sometime in the future. The fields will also appear if "Yes" is selected on the Email project type in the field *Is there a texting piece associated with this project?*

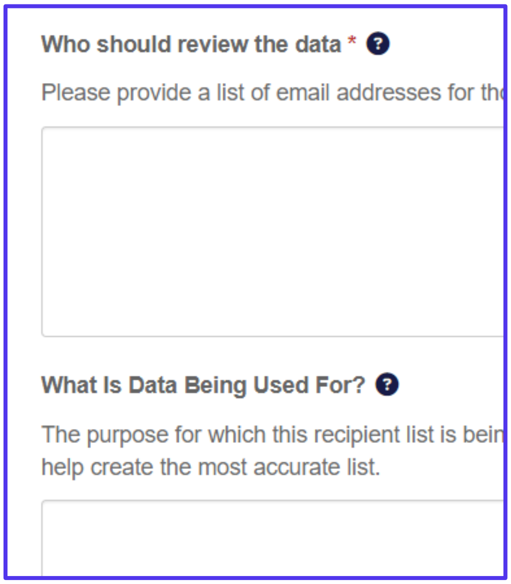


- **Project Goal/Reason for Request** – Not required, this field allows you to briefly explain the goal or reason for requesting this project.
- **Do You Have an Appeal Code**? – If your project has an associated appeal code, select "Yes." If it doesn't, select "No." If you require an appeal code, use the link to the appeal code generator in the help text. If you respond 'Yes,' the following two fields become available:
    - **Appeal Code Type** – Your options for this field are "Engagement/Communication," "Invitation," "Solicitation," and "Stewardship."
    - **Appeal Code** – This is where you will supply the appeal code for your project.

- **Page Content** – Enter the content that you want to be included on the webpage in this large text input field.
- **Web URL** – Indicate the webpage that is associated with your text in this field.
- **Who is Providing Data List**? – There are three options for this field: "Requestor," "ADV IT (Data Pull Request)," and "Other." If you have the data list in an Excel/Sheets file, you would select "Requestor". If the data is being provided by someone else, you would select "Other". If Advancement IT needs to pull data from the system, select "ADV IT".

- **Who should review the data –** Provide the email addresses of up to 5 persons who are responsible for reviewing the data in this field.

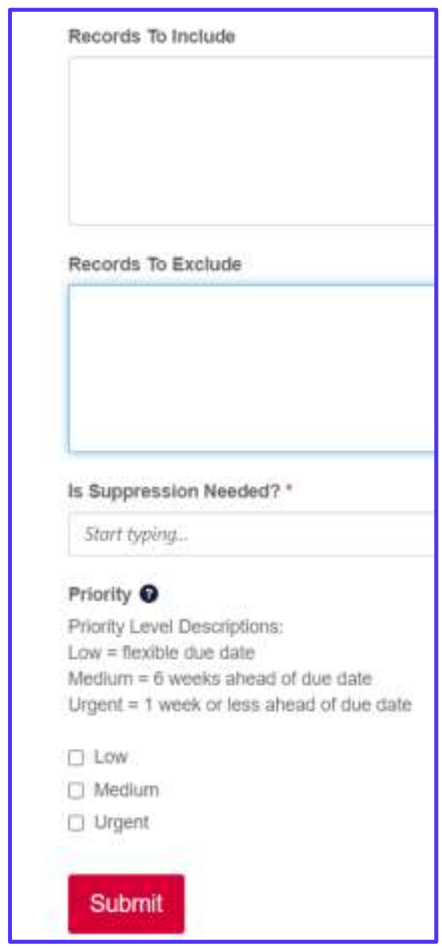
- **What Is Data Being Used For**? –Explain the purpose specific to the data pull request in this field.



- **Records To Include** – Enter the specific records that you are looking for in this field. Be as detailed as possible.

- **Records To Exclude** – Use this area to note any records that you do not want included in the data pull.

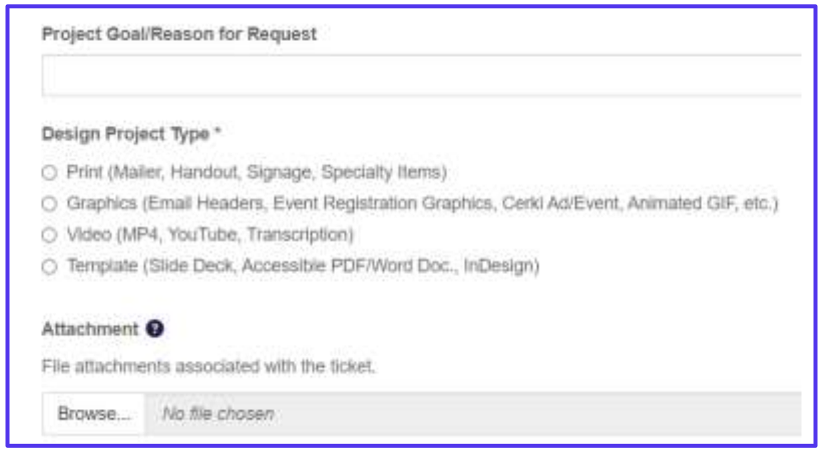
- **Is Suppression Needed**? – Select "Yes" If a person or group of persons should not receive the information. List the persons or groups that should be suppressed int the "Suppression Audience" field that appears.



Design

Select the Design project type if there is a graphic component needed.

- **Project Goal/Reason for Request** (not shown) – Not required, this field allows you to briefly explain the goal or reason for requesting this project.
- **Design Project Type** – Select one of the following design projects: Print, Graphics, Video, or Template in this required field. Different fields will appear depending on which design project type is selected.
- **Attachment** – Not required, you can attach a document, spreadsheet, or other file to the request.


Project Goal/Reason for Request

Design Project Type *

- Print (Mailer, Handout, Signage, Specialty Items)
- Graphics (Email Headers, Event Registration Graphics, Cerkl Ad/Event, Animated GIF, etc.)
- Video (MP4, YouTube, Transcription)
- Template (Slide Deck, Accessible PDF/Word Doc., InDesign)

Attachment

File attachments associated with the ticket.

Browse... No file chosen

The available fields for the four different design project types: Print, Graphics, Video, or Template are discussed below.

Print

The Print design project type is discussed in this section.

- **Design Project Print Type** –Select from the following print options: “Mailer,” “Handout,” “Yard Signage,” and “Specialty Items”.


Design Project Type *

- Print (Mailer, Handout, Signage, Specialty Items)
- Graphics (Email Headers, Event Registration Graphics, Cerkl Ad/Event, Animated GIF, etc.)
- Video (MP4, YouTube, Transcription)
- Template (Slide Deck, Accessible PDF/Word Doc., InDesign)

Design Project Print Type

- Mailer (invitation, postcard, solicitation, report)
- Handout
- Yard Signage (yard/event signs, poster, vinyl graphics, window clings)
- Specialty Items (receipts, envelopes, notecards)

Graphics

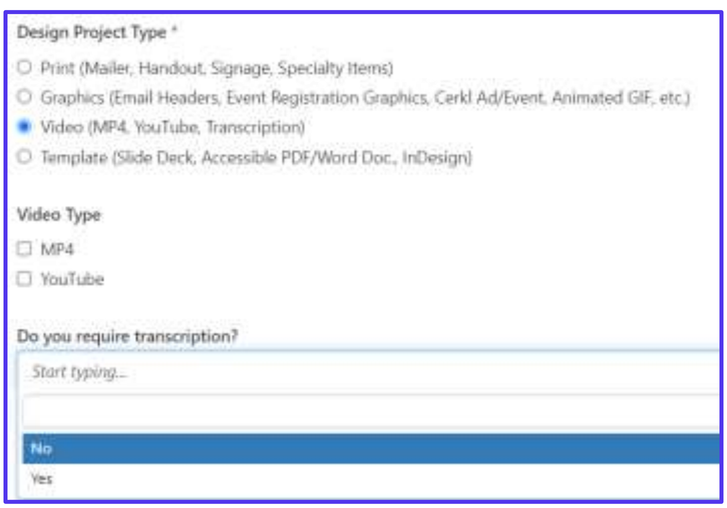
The Graphics Design Project type is covered in this section.

- **How Will Graphics Be Used? –**Not required, you can enter what the graphic is going to be used for, such as an animated GIF or email header in this field.
- **Graphics Size Requirements –** Enter the requirements in this field if the graphic needs to fit within a certain size.
- **Graphics File Type –** Chose the type of graphic that is needed in this multi-select field. An "Other Graphics File Type" field appears where the file types can be entered if "Other" is selected.

Video

The Video Design Project type is covered in this section.

- **Video Type –** Select MP4 and/or YouTube for the video format in this multi-select field.
- **Do you require transcription**? – Select "Yes" to indicate if the video needs to be transcribed in this field. If the video does not need to be transcribed select "No" or leave the field blank.



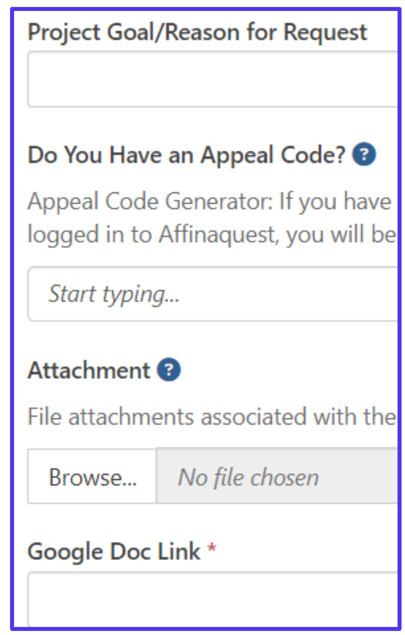
Template

The Template design project type is covered in this section.

- **Template Type** – Select whether you need a slide deck, accessible PDF/Word document, and/or an InDesign file in this multi-select field.

Email

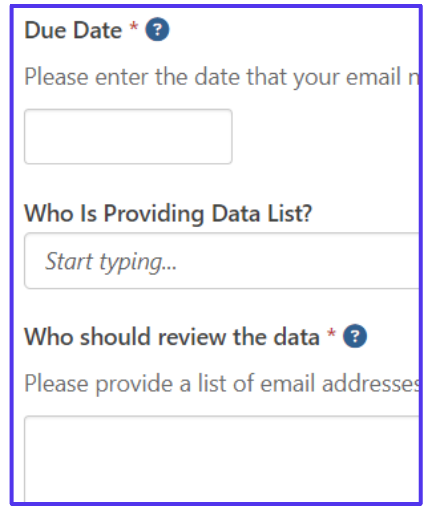
Select this project type if there is an email component to your project. There will be fields for texting information available with this project in the future. The fields specific to this request are covered in this section.



- **Project Goal/Reason for Request** – Not required, explain the goal or reason for requesting this project in this field.
- **Do You Have an Appeal Code**? – Select "Yes" if your project has an associated appeal code. If it doesn't, select "No." If you require an appeal code, use the link to the appeal code generator in the help text. If you respond "Yes," the following fields become available:
  - **Appeal Code Type** – Your options for this field are "Engagement/Communication," "Invitation," "Solicitation," and "Stewardship."
  - **Appeal Code** – This is where you will supply the appeal code for your project.

- **Attachment** – Not required, you can attach a document, spreadsheet, or other file to the request.
- **Google Doc Link** – Provide the link to the Google document that this webpage request is associated with in this required field.

- **Due Date** – The date that the email needs to be sent and also the due date for the request.
- **Who is Providing Data List**? **–** There are three options for this field: “Requestor,” “ADV IT (Data Pull Request),” and “Other.” If you have the data list in an Excel/Sheets file, you would select “Requestor”. If someone else provides the data, select “Other”. If Advancement IT needs to pull data from the system, select “ADV IT,” and a new field, “What Is Data Being Used For?” appears below the “Who should review the data?” field.
- **Who should review the data? –** Add a list of draft reviewer email addresses here (limit of 5). This field is required.
- **Is this dataset request in order to communicate with Alumni?** – If the email is intended as a communication to Alumni, select “Yes.”
- **Draft Email Due Date** – Enter the date that you want the draft of the email to be due.
- **Constituency Codes to Include** – This multi-select list is to indicate which constituents the email will be targeting.



Due Date *

Please enter the date that your email n

Who Is Providing Data List?

Start typing...

Who should review the data *

Please provide a list of email addresses

Is this dataset request in order to communicate with Alumni (email, newsletter, etc)?

Please select if this communication will be sent to Alumni.

Yes

No

Draft Email Due Date

Please provide a date by which you would like to see a draft for review

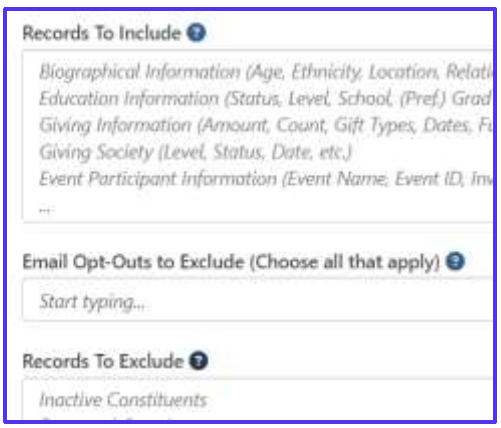
Constituency Codes to Include (Choose all that apply)

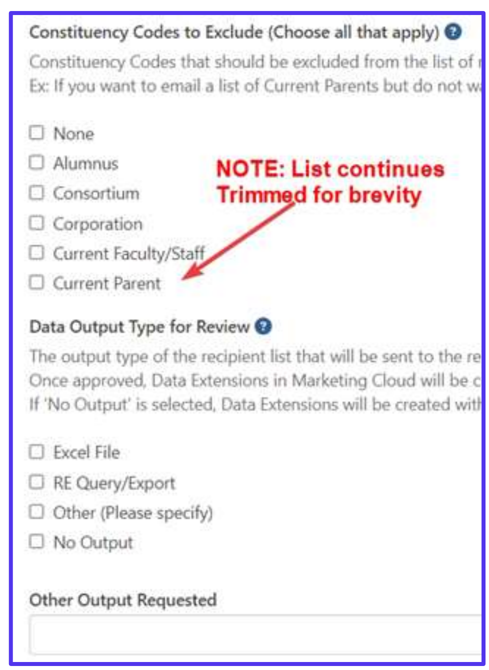
The constituents that the email is specifically targeting.

All Constituents

Alumnus

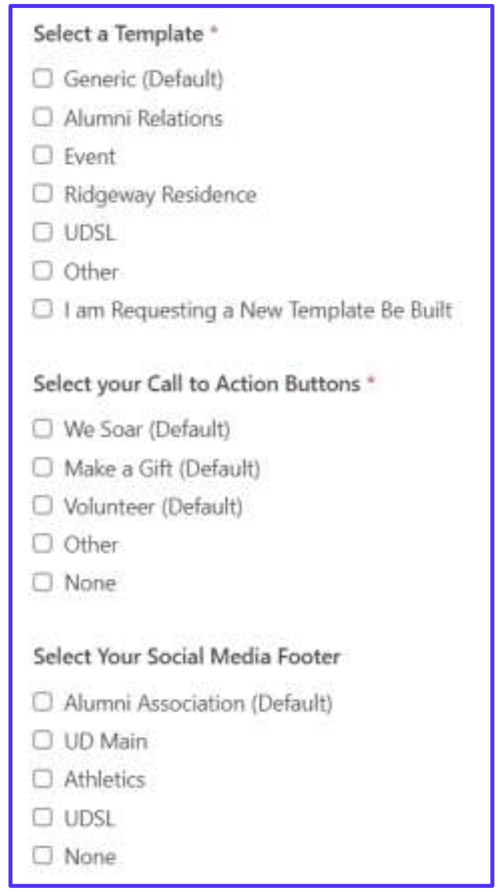
- **Include Organizations?** – Select whether organizations should be included or if this just targets individuals.
- **Household Recipients to Include** – Indicate whether the email targets just the head of household or if it should be sent to everyone in the household.
- **Records To Include** – This field gives you the option to provide what records you are looking for specifically. Please be as detailed as possible.
- **Email Opt-Outs to Exclude** – This multi-select drop-down lets you indicate the opt-out groups that should not receive the email.
- **Records To Exclude** – Similarly to the "…Include" field above, use this area to note any records that you do not want included in the data pull.

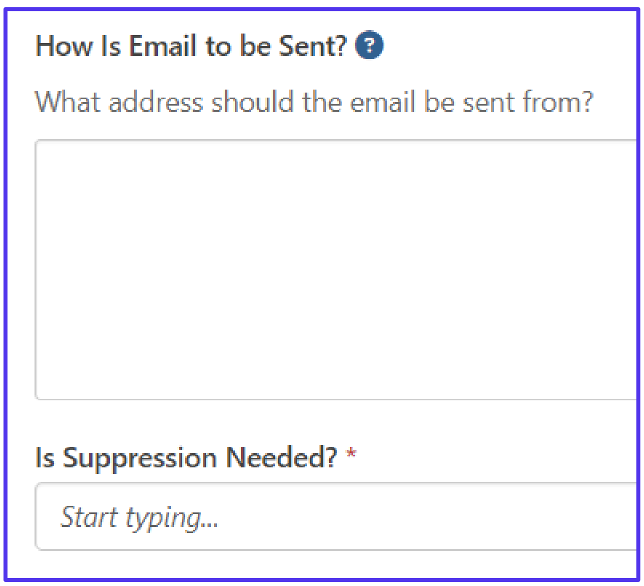




- **Constituency Codes to Exclude** – Select any constituency codes that should be excluded from the recipient list.
- **Data Output Type for Review** – Select the data output type for the recipient list that you wish to receive.
- **Other Output Requested** – If you require another output type, list that in this field.

- **Select a Template** – This required multi-select field allows you select the templates you wish to have for the email. If "Other" or "I am requesting a New Template to Be Built" is selected, a field appears for you to explain the template that you want.
- **Select your Call to Action Buttons** – Also required, this multi-select field lets you choose which call to action buttons you would like to include in the email. If "Other" is selected, a field appears for you to list which buttons you want.
- **Select Your Social Media Footer** – You can select the social media links that will appear in the footer of the email with this field.
- **How Is Email to be Sent?** – List the email address that you want the email to come from.
- **Is Suppression Needed**? – A simple yes/no field that ties into the data request. If you select "Yes," a *Suppression Audience* field appears.





Events

As of revision 1.5 of this document, there are two separate types of events: Alumni or Special. The options are entirely different for the two different types, as the Special event type requires much more information than the Alumni. One thing to keep in mind is that many fields request dates. Pay close attention to the date that is being asked for. The *Due Date* field is among the most important as it represents **THE** date where all work on the request must be completed. This section will cover each of these along with the associated dependencies based on your selections in certain fields. This document presents the fields with every effort to keep each section as brief as possible.

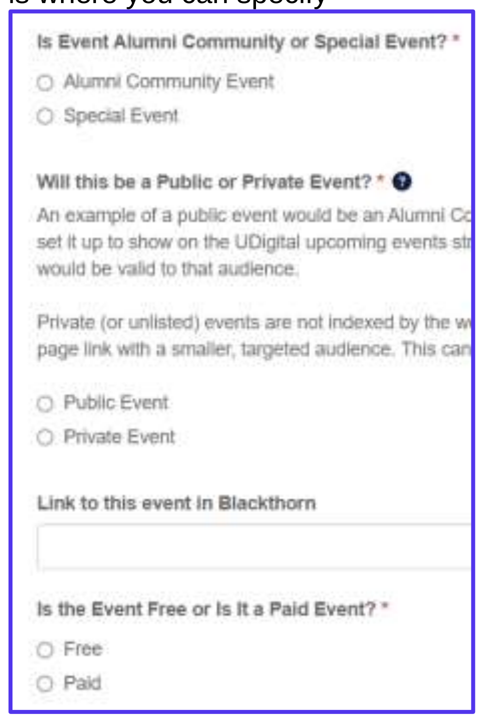
Alumni Community Event

This project type creates an Event request only. As mentioned above, pay attention to the date fields to ensure that you are getting the correct information over to MarComm and Adv IT.

AC Event Section 1a

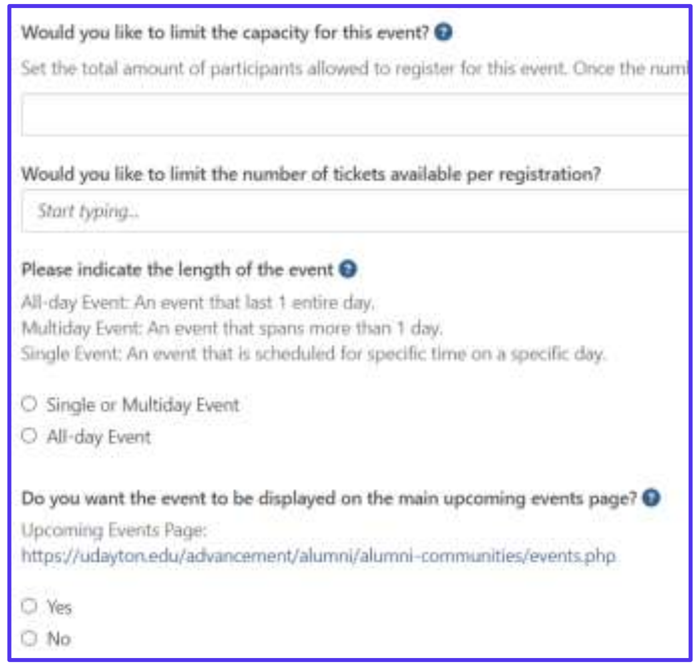
Not shown is the *Project Goal or Reason for Request* field. This field is where you can specify the goal or reason for the event if you wish to.

- **Is Event Alumni Community or Special Event** – Selecting “Special” in this field brings an additional *Event Webpage Copy* text field under the *Event Title*.
- **Will this be a Public or Private Event**? – Your choice in this field determines which field(s) become available in the next section regarding Alumni Community Pages where the event may be displayed.
- **Link to this event in Blackthorn** – Enter the Blackthorn link here if available.
- **Is the Event Free or Is It a Paid Event**? – This field notes if the event is paid or free. If it is paid, the *Price* field (not shown) appears immediately below.


Is Event Alumni Community or Special Event? *
Alumni Community Event
Special Event
Will this be a Public or Private Event? *
An example of a public event would be an Alumni Co
set it up to show on the UDigital upcoming events st
would be valid to that audience.
Private (or unlisted) events are not indexed by the w
page link with a smaller, targeted audience. This can
Public Event
Private Event
Link to this event in Blackthorn
Is the Event Free or Is It a Paid Event? *
Free
Paid

AC Event Section 1b

The section covers the event capacity, number of tickets, length of the event, and gives the option to choose whether the event is displayed on UD's main Events page.



Would you like to limit the capacity for this event?

Set the total amount of participants allowed to register for this event. Once the num

Would you like to limit the number of tickets available per registration?

Start typing...

Please indicate the length of the event

All-day Event: An event that last 1 entire day.
Multiday Event: An event that spans more than 1 day.
Single Event: An event that is scheduled for specific time on a specific day.

Single or Multiday Event
All-day Event

Do you want the event to be displayed on the main upcoming events page?

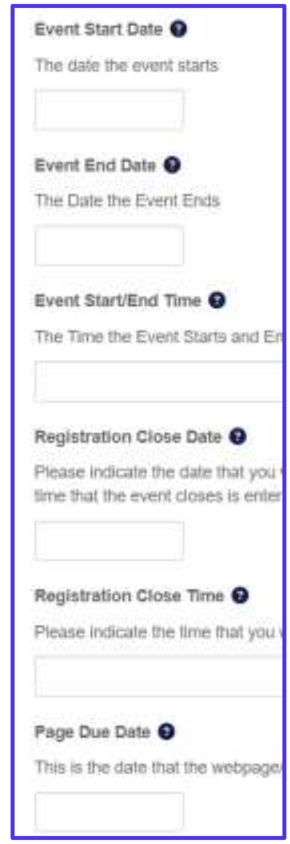
Upcoming Events Page:
https://udayton.edu/advancement/alumni/alumni-communities/events.php

Yes
No

- **Would you like to limit the capacity for this event?** – Enter the maximum number of attendees who can register for this event.
- **Would you like to limit the number of tickets available per registration?** – This yes/no field asks if the number of tickets per registration should be limited. If "Yes" is selected, a *Ticket Limit per Registration* field displays. (Not shown)
- **Please indicate the length of the event** – This field details whether the event is an all-day or single/multi day.
- **Do you want the event to be displayed on the upcoming events page**? – This field gives the choice of whether you wish to have the event posted on the Alumni Community Events page.
- **Event Webpage Copy** (Not Shown) – Any verbiage that you would like to be included on the event page can be included here. This field appears only if "Special" is selected in the *Is Event Alumni Community or Special Event* field.

AC Event Section 2a (Dates)

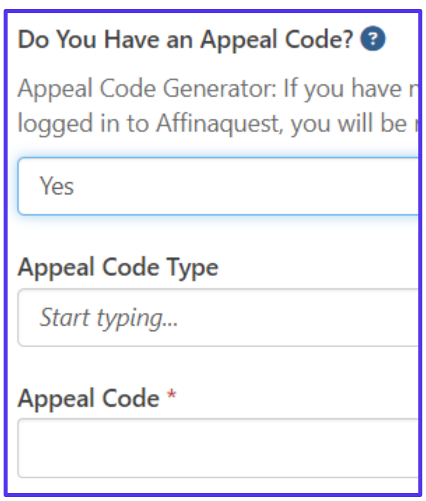
The section starts in with important dates for the beginning stages of the event page project.



- **Event Start Date** – This field denotes the date the event starts.
- **Event End Date** – This field lists the date that the event ends.
- **Event Start/End Time** – This field details the times that the event starts and ends (i.e., 12:00pm - 6:00pm).
- **Registration Close Date** – The purpose of this field is to select the date that the system should stop accepting registrations.
- **Registration Close Time** – This field allows you to enter the time that the system should stop accepting registrations on the date entered above.
- **Page Due Date** – The date that the event registration page is to be made available on the website.

AC Event Section 2b

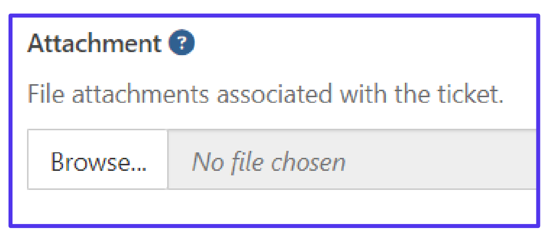
This section covers the appeal code field. Enter appeal code information only if your project has one. You may otherwise leave this field blank or select "No" from the drop-down.



- **Do You Have an Appeal Code**? – While an appeal code is not required for every project, you may wish to specify that you have one. If "Yes" is selected, the following fields are displayed:
- **Appeal Code Type** – There are 4 different appeal code types listed here: Engagement/Communication, Invitation, Solicitation, and Stewardship. This field is not required.
- **Appeal Code**– This is a required field. If you have an appeal code, list it here.

AC Event Section 3a

The attachment field allows you

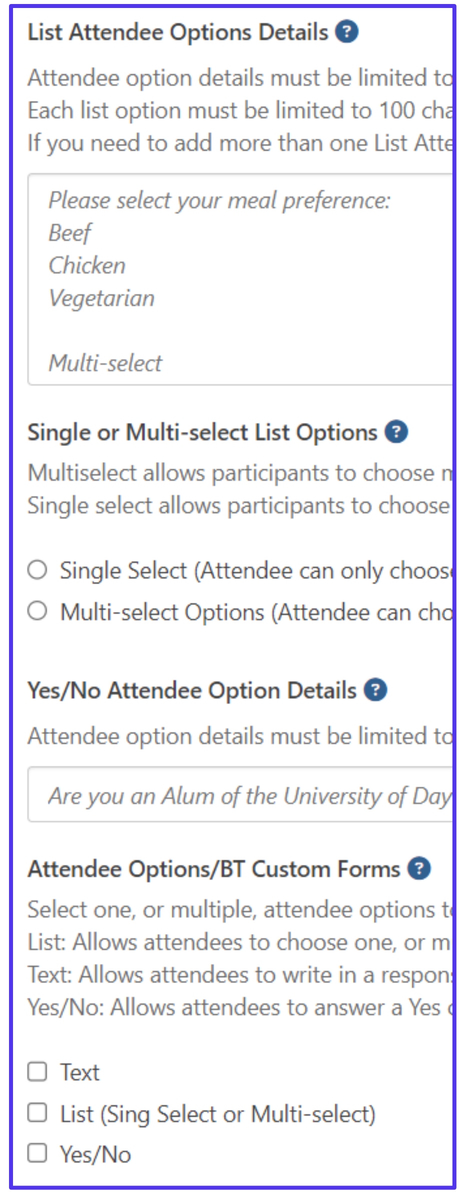


- **Attachment** – This field allows you to attach a general document or any other file they may need to get to MarComm or ADV IT. There is a field specifically for the associated Google document farther down the ticket.

AC Event Section 3b

This section covers the event options that are available for attendees.

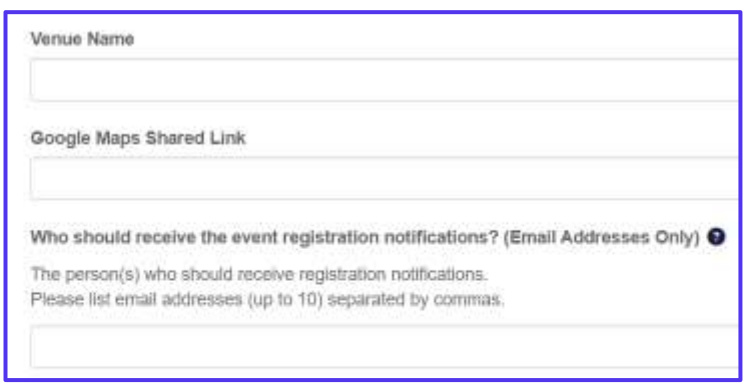
- **List Attendee Option Details** – This section provides the opportunity to detail any options that event attendees may have, such as choice of meal, events they like attending, and anything else you may wish to convey. This section continues with important dates and times relating to the event.
- **Single or Multi-select List Options** – This section lets ADV IT know whether participants can select only one option or if they can select multiple options.
- **Yes/No Attendee Option Details** – This field is for you to include yes/no questions for the attendees.
- **Attendee Options/BT Custom Forms** – This field is where you can select attendee options for the event.


List Attendee Options Details
Attendee option details must be limited to
Each list option must be limited to 100 cha
If you need to add more than one List Atte
Please select your meal preference:
Beef
Chicken
Vegetarian
Multi-select
Single or Multi-select List Options
Multiselect allows participants to choose m
Single select allows participants to choose
Single Select (Attendee can only choos
Multi-select Options (Attendee can cho
Yes/No Attendee Option Details
Attendee option details must be limited to
Are you an Alum of the University of Day
Attendee Options/BT Custom Forms
Select one, or multiple, attendee options t
List: Allows attendees to choose one, or m
Text: Allows attendees to write in a respon
Yes/No: Allows attendees to answer a Yes
Text
List (Sing Select or Multi-select)
Yes/No

AC Event Section 4a

This section covers the name of the venue and more about the event.

- **Venue Name** –Enter the name of the venue where the event is being held.
- **Google Maps Shared Link** – This field is for the URL to the Google Maps page showing where the event is to be held.
- **Who should receive the event registration notifications?** – Up to ten email addresses can be listed here of persons who should receive notifications about event registrations.


Venue Name
Google Maps Shared Link
Who should receive the event registration notifications? (Email Addresses Only)
The person(s) who should receive registration notifications.
Please list email addresses (up to 10) separated by commas.

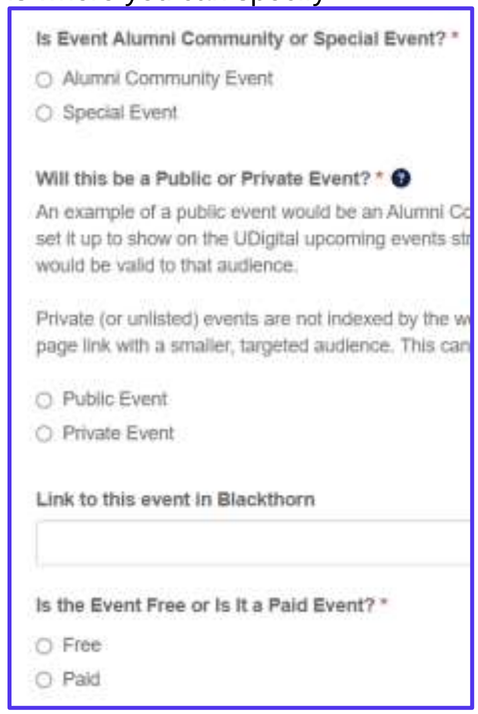
Special Event

The Special Event project type is by far the largest request form with the most fields. It covers much of the same items as the Alumni Event project above, but also has fields regarding the data request as well as the email.

Special Event Section 1a

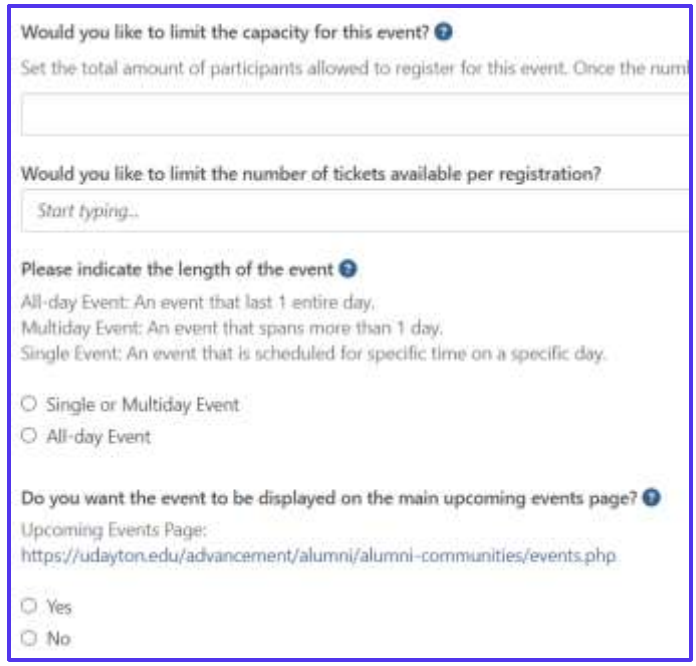
Not shown is the *Project Goal or Reason for Request* field. This field is where you can specify the goal or reason for the event if you wish to.

- **Is Event Alumni Community or Special Event** – Selecting an option in this field brings up additional fields depending on your choice.
- **Will this be a Public or Private Event**? – Your choice in this field determines which field(s) become available in the next section regarding Alumni Community Pages where the event may be displayed.
- **Link to this event in Blackthorn** – Enter the Blackthorn link here if available.
- **Is the Event Free or Is It a Paid Event**? – This field notes if the event is paid or free. If it is paid, the *Price* field (not shown) appears immediately below.



Special Event Section 1b

The section covers the event capacity, number of tickets, length of the event, and gives the option to choose whether the event is displayed on UD's main Events page.


Would you like to limit the capacity for this event?
Set the total amount of participants allowed to register for this event. Once the num

Would you like to limit the number of tickets available per registration?
Start typing...

Please indicate the length of the event
All-day Event: An event that last 1 entire day.
Multiday Event: An event that spans more than 1 day.
Single Event: An event that is scheduled for specific time on a specific day.

- Single or Multiday Event
- All-day Event

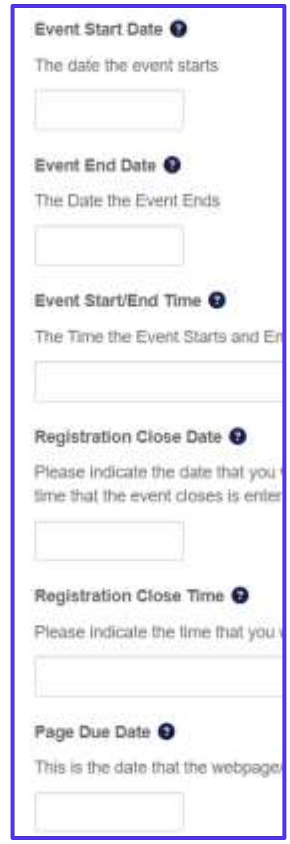
Do you want the event to be displayed on the main upcoming events page?
Upcoming Events Page:
https://udayton.edu/advancement/alumni/alumni-communities/events.php

- Yes
- No

- **Would you like to limit the capacity for this event?** – Enter the maximum number of attendees who can register for this event.
- **Would you like to limit the number of tickets available per registration?** – This yes/no field asks if the number of tickets per registration should be limited. If "Yes" is selected, a *Ticket Limit per Registration* field displays. (Not shown)
- **Please indicate the length of the event** – This field details whether the event is an all-day or single/multi day.
- **Do you want the event to be displayed on the upcoming events page**? – This field gives the choice of whether you wish to have the event posted on the Alumni Community Events page.
- **Event Webpage Copy** (Not Shown) – Any verbiage that you would like to be on the event page can be included here.

Special Event Section 2a (Dates)

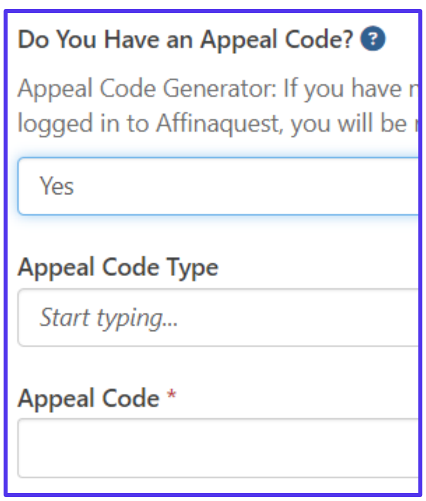
The section starts in with important dates for the beginning stages of the event page project.



- **Event Start Date** – This field denotes the date the event starts.
- **Event End Date** – This field lists the date that the event ends.
- **Event Start/End Time** – This field details the times that the event starts and ends (i.e., 12:00pm - 6:00pm).
- **Registration Close Date** – The purpose of this field is to select the date that the system should stop accepting registrations.
- **Registration Close Time** – This field allows you to enter the time that the system should stop accepting registrations on the date entered above.
- **Page Due Date** – The date that the event registration page is to be made available on the website.

Special Event Section 2b

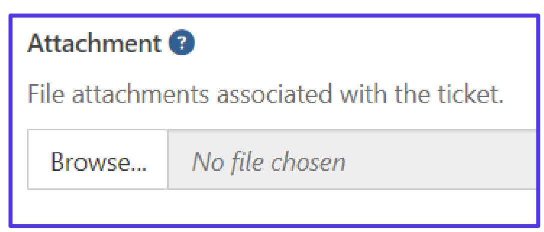
This section covers the appeal code fields. Enter appeal code information only if your project has one. You may otherwise leave this field blank or select "No" from the drop-down.



- **Do You Have an Appeal Code**? – While an appeal code is not required for every project, you may wish to specify that you have one. If "Yes" is selected, the following fields are displayed:
- **Appeal Code Type** – There are 4 different appeal code types listed here: Engagement/Communication, Invitation, Solicitation, and Stewardship. This field is not required.
- **Appeal Code**– This is a required field. If you have an appeal code, list it here.

Special Event Section 3a

The attachment field allows you attach any number of files to the request ticket.

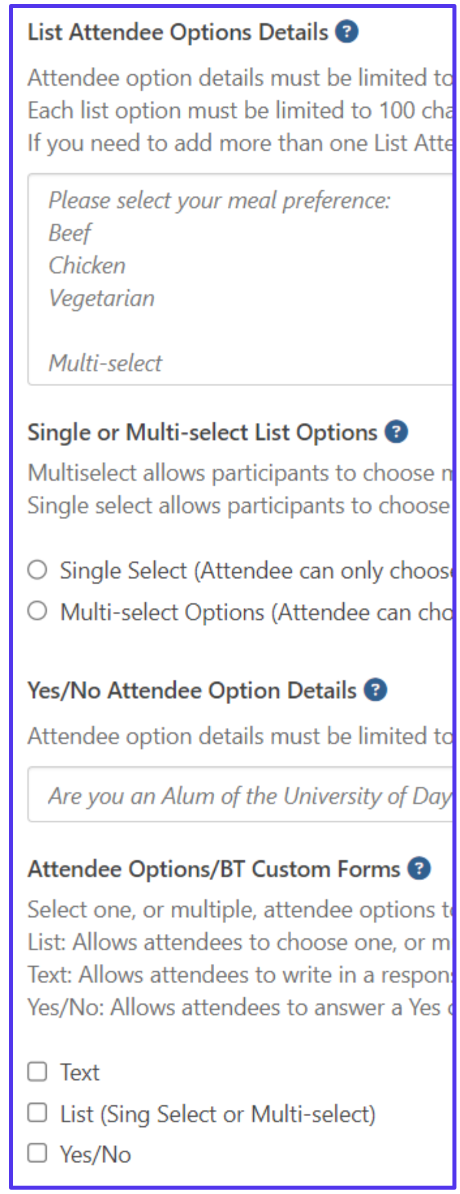


- **Attachment** – This field allows you to attach a general document or any other file they may need to get to MarComm or ADV IT.

Special Event Section 3b

This section covers the event options that are available for attendees.

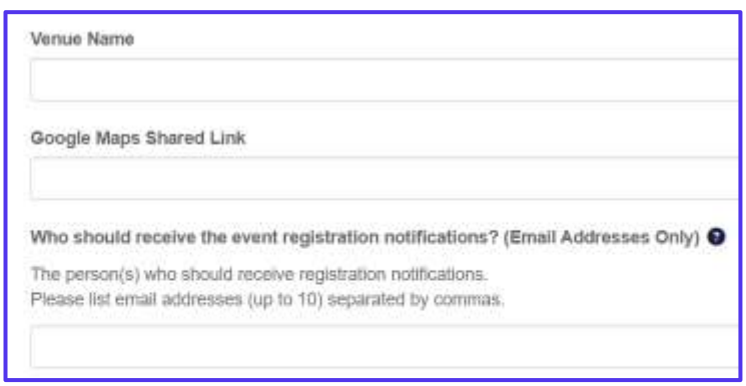
- **List Attendee Option Details** – This section provides the opportunity to detail any options that event attendees may have, such as choice of meal, events they like attending, and anything else you may wish to convey. This section continues with important dates and times relating to the event.
- **Single or Multi-select List Options** – This section lets ADV IT know whether participants can select only one option or if they can select multiple options.
- **Yes/No Attendee Option Details** – This field is for you to include yes/no questions for the attendees.
- **Attendee Options/BT Custom Forms** – This field is where you can select attendee options for the event.



Special Event Section 4a

This section covers the name of the venue and more about the event.

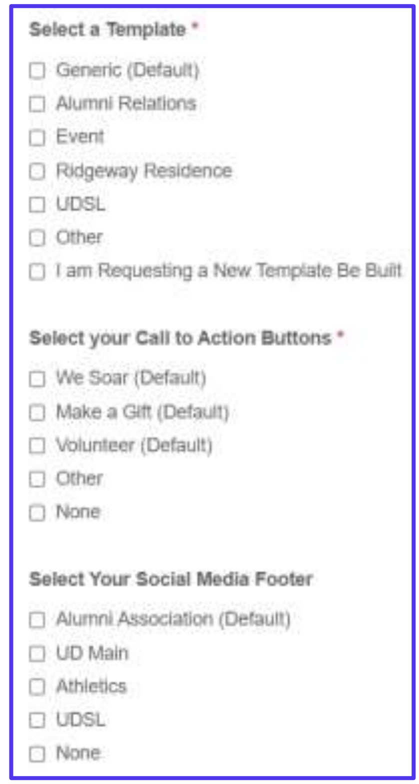
- **Venue Name** –Enter the name of the venue where the event is being held.
- **Google Maps Shared Link** – This field is for the URL to the Google Maps page showing where the event is to be held.
- **Who should receive the event registration notifications?** – Up to ten email addresses can be listed here of persons who should receive notifications about event registrations.



Special Event Section 4b (Email and Data)

This section is where you can enter information about the event email and email recipient list.

- **Who should review the data?** – This section is where you can enter a list of email addresses for up to 5 people who will be a part of the draft review process.
- **Draft Email Due Date** – The date when the draft of the email should be ready to send to the reviewer(s).



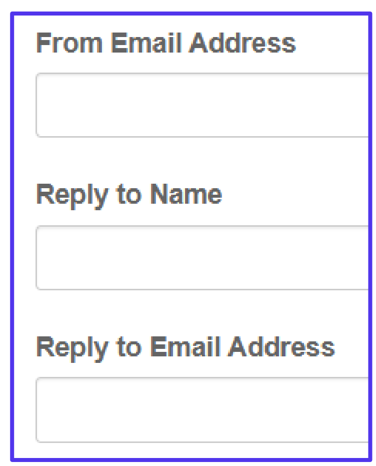
Special Event Section 5a

This section is where you will select template options for the event email notification.

- **Select a Template** – This required field allows you to select from a list of available tempates for the email. If “Other” or “I am Requesting a New Template Be Built” is selected, the *If Other or Requesting New Template, please explain* field (not shown) appears where you can enter information about the template that you require.
- **Select you Call to Action Buttons** – This required field gives you the opportunity to select which call to action buttons you would like to be available in the email. If “Other” is selected, the “*List Other Call to Action Buttons*” field (not shown) appears where you are able to detail which buttons you want.
- **Select Your Social Media Footer** – This field is where you can select which social media footers you want on the email.

Special Event Section 5b

This section is where you can enter information about how the notification sender and reply to names and email addresses will be shown.



- **From Email Address** – This is what the recipient will see as to where the email is originating.
- **Reply to Name** – This is what the recipient will see as the name of who has sent the email.
- **Reply to Email Address** – When the recipient replies, this is the email address where those replies will be sent.
- **Additional Details** (not shown) – This field is where any further information not covered in the rest of the request can be entered.

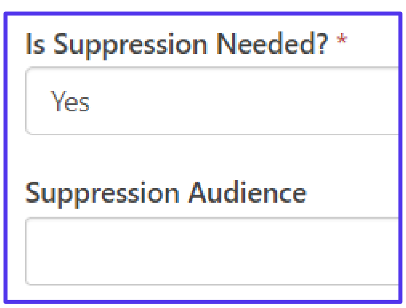
Mail or Print

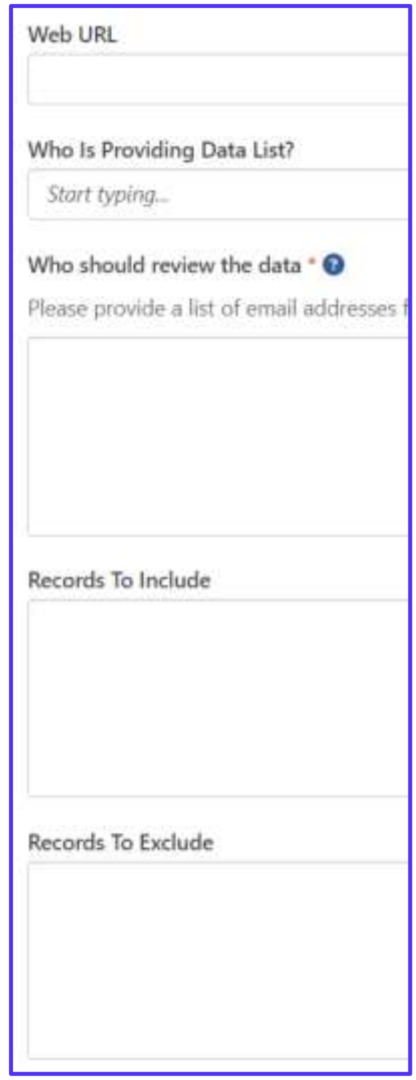
If you need a printed piece that needs to be mailed, select this project type. The following section goes over the fields associated with this project.

- **Project Goal/Reason for Request** – This field, not required, allows you to briefly explain the goal or reason for requesting this project.
- **Do You Have an Appeal Code**? – If your project has an associated appeal code, select "Yes." If you don't, select "No." If you require an appeal code, the link to the appeal code generator in Affinaquest is provided for you. If the response is "Yes," the following two fields become available:

  - **Appeal Code Type** – Your options for this field are "Engagement/Communication," "Invitation," "Solicitation," and "Stewardship."
  - **Appeal Code** – This is where you will supply the appeal code for your project.
- **Attachment** – Not a required section, but it is here in case you want to attach a document, spreadsheet, or other file.
- **Google Doc Link** (not shown) – This required field allows you to specify a Google document that pertains to this mail or print project.

- **Who is Providing Data List**? – There are three options for this field: “Requestor,” “ADV IT (Data Pull Request),” and “Other.” If you have the data list in an Excel/Sheets file, you would select “Requestor”. If someone else provides the data, select “Other”. If Advancement IT needs to pull data from the system, select “ADV IT,” and a new field, “What Is Data Being Used For?” appears below the “Who should review the data?” field.
- **Who should review the data? –** Add a list of draft reviewer email addresses here (limit of 5). This field is required.
- **Records To Include –** This field gives you the option to provide what records you are looking for specifically. Please be as detailed as possible.
- **Solicit Codes to Exclude –** This field is where you will select (multi-selectable) all the solicit codes to which you do not want to send the mailer or print.
- **Records To Exclude –** Similarly to the “…Include” field above, use this area to note any records that you do not want included in the data pull.
- **Output Type –** This field allows you to select the output type of the data pull that is associated with this request. The output could be an AQ query, Excel file, Report, Standard Mail File, no output, or Other. Be sure to put information about the output type in the *Project Description* field if “Other” is selected.
- **Is Suppression Needed**? – A simple yes/no field that ties into the data request. If you select ‘Yes,’ a ‘Suppression Audience’ field appears.





Document Revisions, Review, and Approval

Revisions

Version	Date	Primary Author(s)	Description of Version	Status
0.1	8/6/2024	Fremder	Document created	Draft
0.2	8/9/2024	Fremder	Updated fields in Data, Email	Draft
1.0	8/13/2024	Fremder	Document finalized, approved (DB)	Draft
1.1	8/27/2024	Fremder	Updated Events section (DN)	Draft
1.2	8/29/2024	Fremder	Removed data request section (DB)	Final
1.3	9/9/2024	Fremder	Updated images to reflect name change	Final
1.4	9/18/2024	Fremder	Updated re: Due Date field	Final
1.5	10/29/2024	Fremder	Updated new Events (Alumni, Special), grammar/spelling corrections	Final

Review & Approval

Requirements Document Approval History

Approving Party	Version Approved	Signature	Date
Nichole Rustad	1.3		8/28/2024
Doug Bishop	1.4		9/18/2024
Staci Grant	1.3		8/28/2024

Requirements Document Review History

Reviewer	Version Reviewed	Signature	Date