UNIVERSITY OF DAYTON ADVANCEMENT IT

ADV Project Request Training Guide

AUGUST 19, 2024

Version Number 1.1

Contents

Purpose

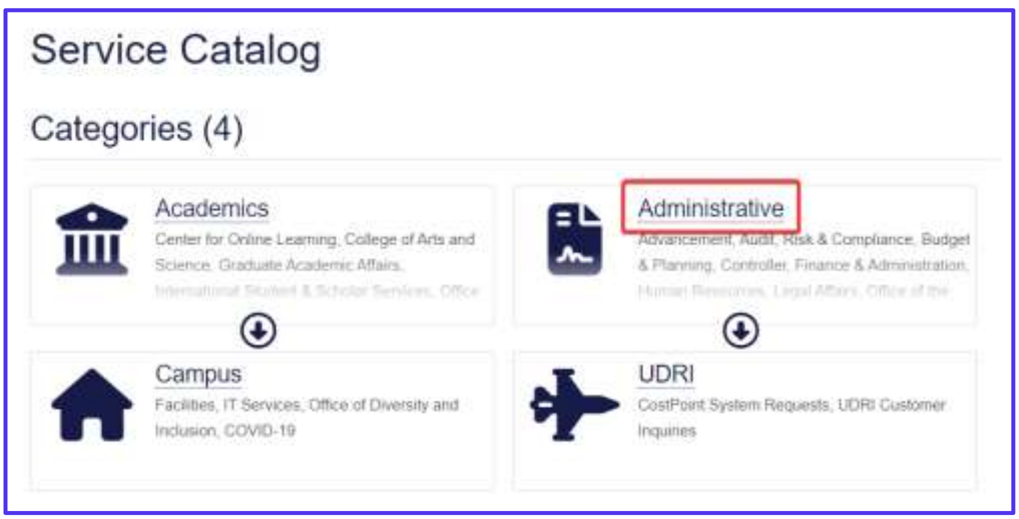
The purpose of this document is to help guide Advancement users through the updated process of submitting an Advancement Project Request TDX. This guide will walk you through the process of creating the ticket, show the fields, and give a brief explanation of what each field is asking.

ADV Project Request TDX Ticket

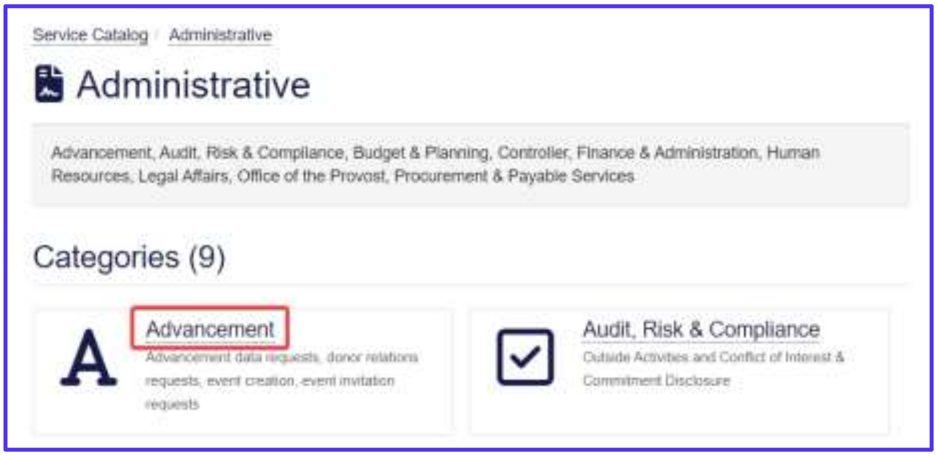
In order to get to the location in the TeamDynamix Service Catalog, you must first visit the following webpage: go.udayton.edu/servicecatalog. You should be familiar with this page already, but if not, welcome to the UD Service Catalog! This main page is where you will find knowledge articles relating 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. From the main Service Catalog page, click **Services** in the area beneath the UD logo.

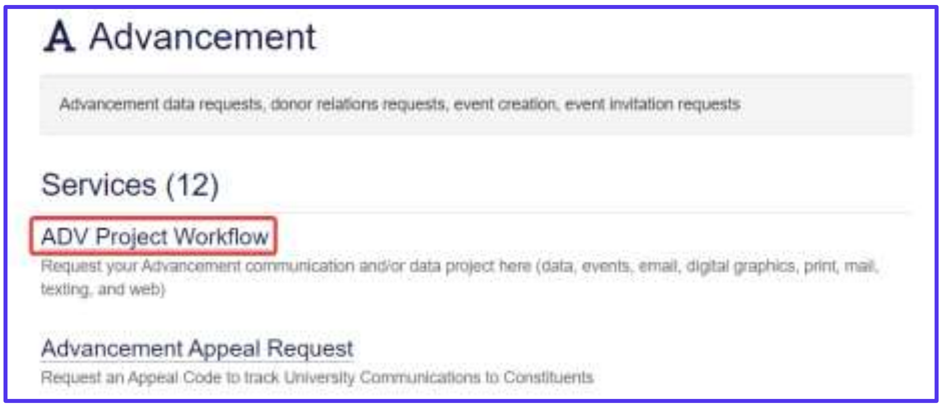
2. Click **Administrative** on the *Service Catalog* page.



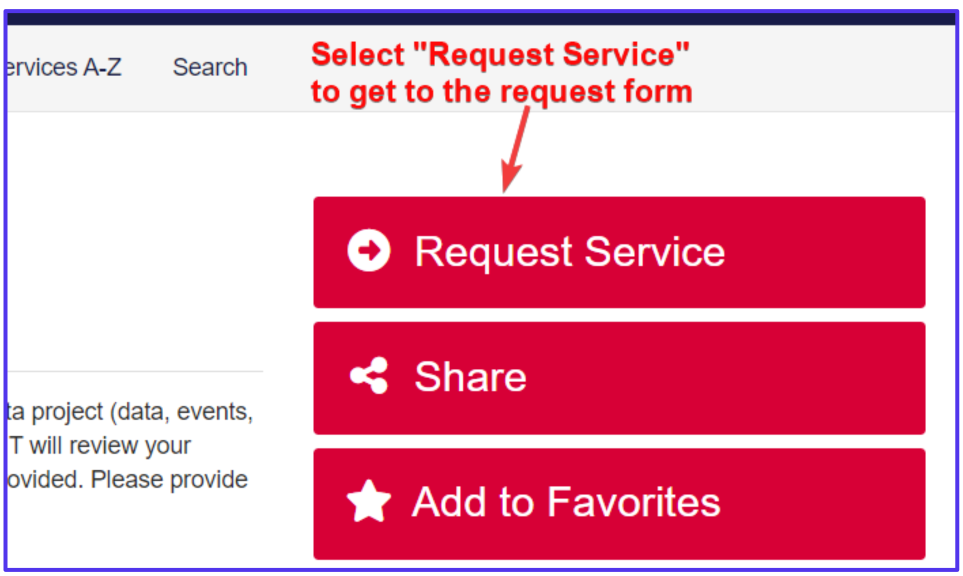
3. Click **Advancement** on the *Administrative* page.



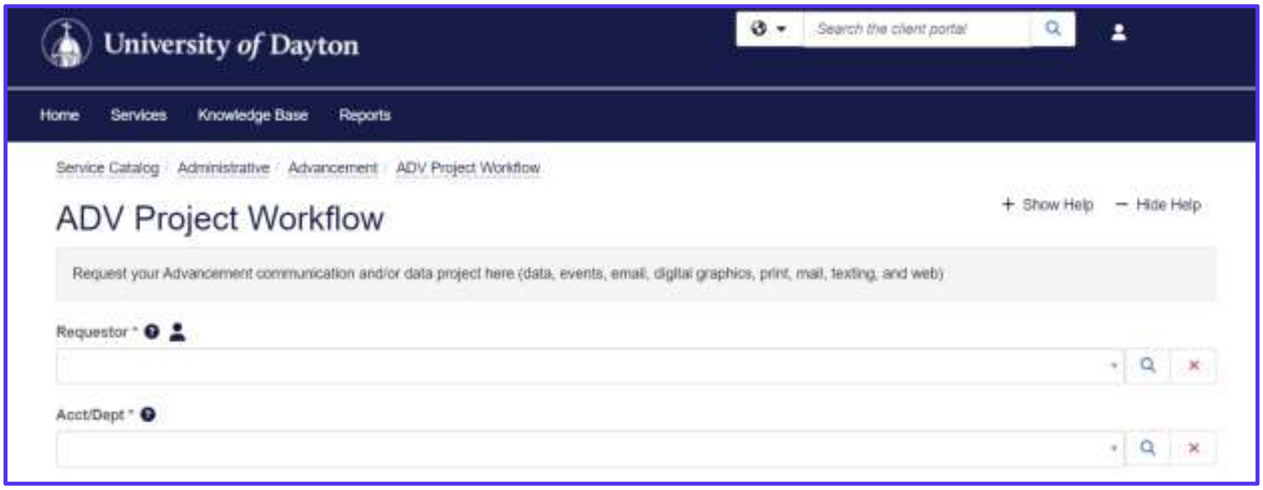
4. Click **ADV Project Workflow** on the *Advancement* page.



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

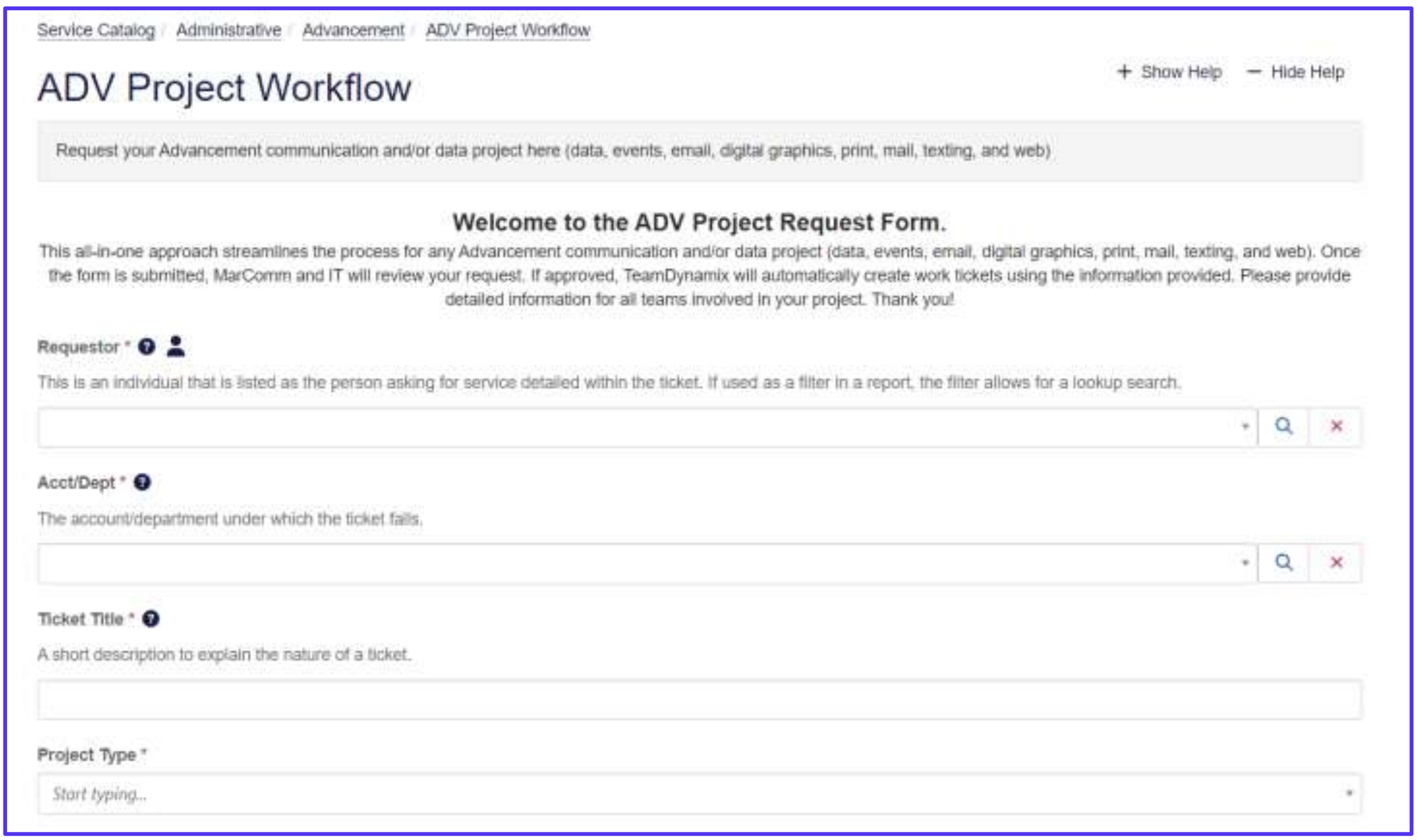


Your screen should look very similar to the following:



Default Fields

The image below shows the default top section of the request. This initial top section is the same for all requests regardless of the project type chosen. Additionally, some of the top and bottom fields remain the same on the initial TDX with changes occurring farther down depending on selections made in other fields.



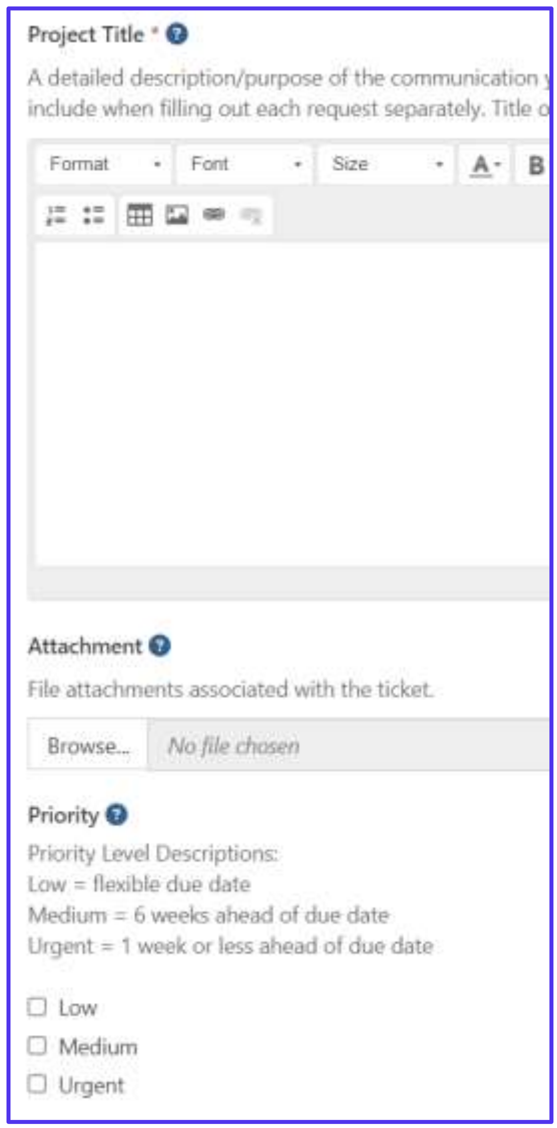
Top Fields

- **Requestor** – The *Requestor* field is a required field and will be automatically filled in with your name.
- **Acct/Dept** – The *Acct/Dept* field is required, but it auto-populates based off the part of the division in which you work.
- **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, Event, Email, Design, Mail or Print, and Data Request.

Bottom Fields

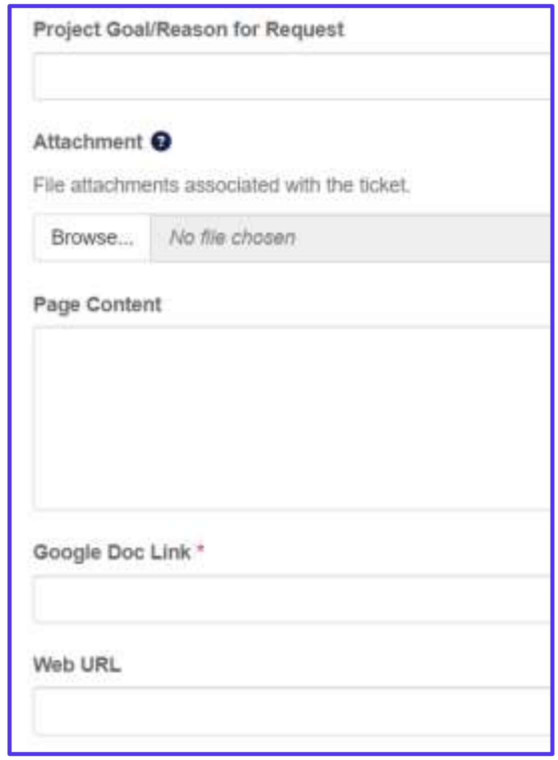
Each request page will have these fields available near the bottom. In between *Project Title* and *Attachment* is where the custom fields appear once the Project Type is selected.

- **Project Title** – The importance of this field changes depending upon which project type is chosen. If a project requiring a new webpage is selected, this will be what appears at the very top of the browser screen. For an event, this is what is used for the title of the event page. Projects have specific naming conventions that are mentioned in the help text.
- **Attachment** – Not a required section, but it is here in case the Requestor wants to attach a document, spreadsheet, or other file.
- **Priority** – Important but not required, this field defaults to “Medium” if nothing is selected. This allows for the technicians working on the request to understand how important something is.

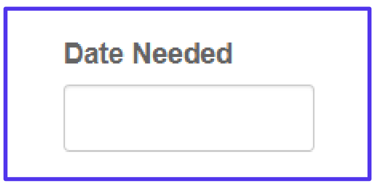


Webpage

The following section goes over the fields for the Webpage project type.



- **Project Goal/Reason for Request** – This field, not required, allows you to briefly explain the goal or reason for requesting this project.
- **Page Content** – This large text input field allows you to input whatever content that you want to be included on the webpage.
- **Google Doc Link** – This field is required, and it where you can provide the link to the Google document that this webpage request is associated with.
- **Web URL** – If you know where you want to page to go, or if you are requesting a specific webpage be updated, you can enter that in this field.
- **Date Needed** – This is the date that the page needs to be live.

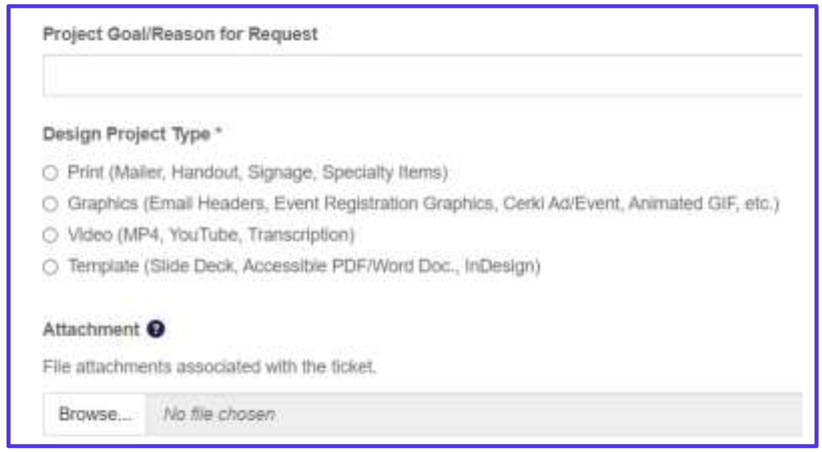


Once you have filled out all the fields, click **Submit.**

Design

The Design project type is chosen if there is a graphic component needed.

- **Project Goal/Reason for Request** (not shown) – This field, not required, allows you to briefly explain the goal or reason for requesting this project.
- **Design Project Type** – This required field lets you mutually exclusive selection of the required piece of the project they are requesting. Depending on which design project type is selected, different fields will appear. See the section *Design Project Types* below.



- **Attachment** – Not a required section, but it is here in case you want to attach a document, spreadsheet, or other file.

Design Project Types

There are four different design project types: Print, Graphics, Video, or Template. This section covers the four types and their associated selections.

Print

This section details the Print Design Project type.

- **Design Project Print Type** – This multi-select field allows the user to select from the following print options: “Mailer,” “Handout,” “Yard Signage,” and “Specialty Items”.

Graphics

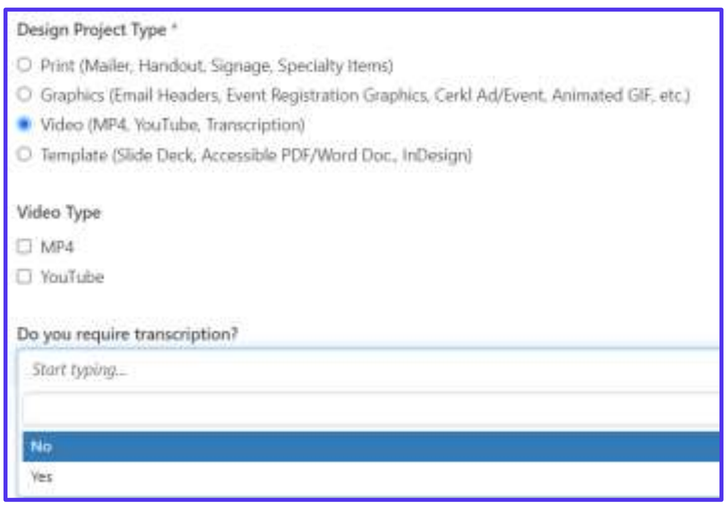
This section covers the Graphics Design Project type.

- **How Will Graphics Be Used? –** This section is not required, but it allows you to detail what the graphic is going to be used for, such as an animated GIF or email header.
- **Graphics Size Requirements –** If the graphic needs to fit within a certain size, that can be listed here.
- **Graphics File Type –** This multi-select field lets you pick the type of graphic that is needed. If “Other” is selected, an “Other Graphics File Type” field appears where the file type can be entered.

Video

The Video Design Project type is covered in this section.

- **Video Type –** This field gives you the option to select MP4 and/or YouTube for the video format.
- **Do you require transcription**? **–** If the video needs to be transcribed, please indicate that in this field.



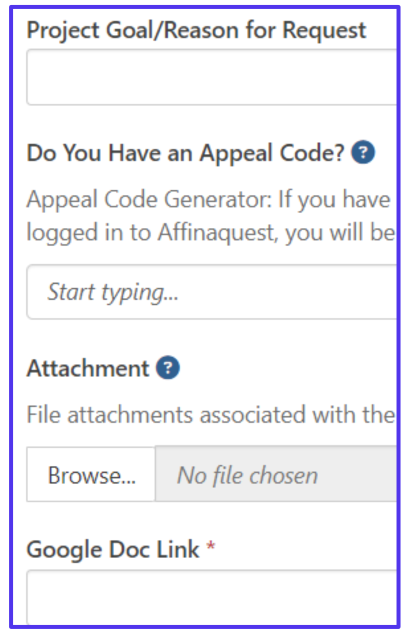
Template

This section covers the final design project type: Template.

- **Template Type** – This multi-select field lets you choose between a slide deck, accessible PDF/Word document, and/or an InDesign file.

Email

If there is an email component to the project, select this option. Also, if there is a texting piece with this request, there are fields for that information. The following section covers the fields specific to this request.

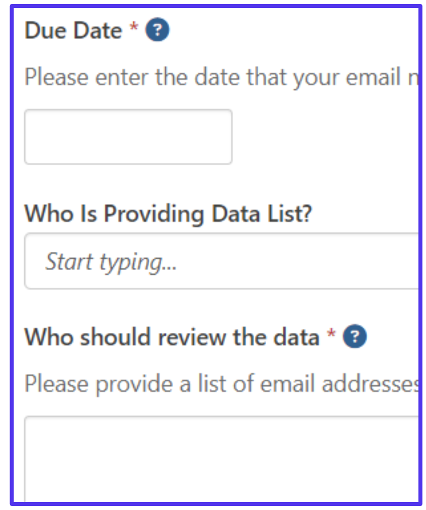


NOTE: *As of August 2024, the texting project type has been placed on hold.*

- **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** – This field is required, and it is where you can provide the link to the Google document that this webpage request is associated with.

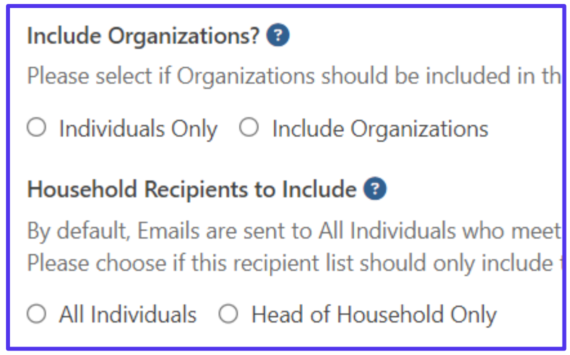
- **Due Date** – The date that the email needs to be sent and also the due date for the request.
- **Who is Providing Data List**? **–** There are three options for this field: “Requestor,” “ADV IT (Data Pull Request),” and “Other.” If you have the data list in an Excel/Sheets file, you would select “Requestor”. If 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,” and a new field, “What Is Data Being Used For?” appears below the “Who should review the data?” field.
- **Who should review the data? –** A list of draft reviewer email addresses can be added here (limit of 5). This field is required.


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? –** 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.


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

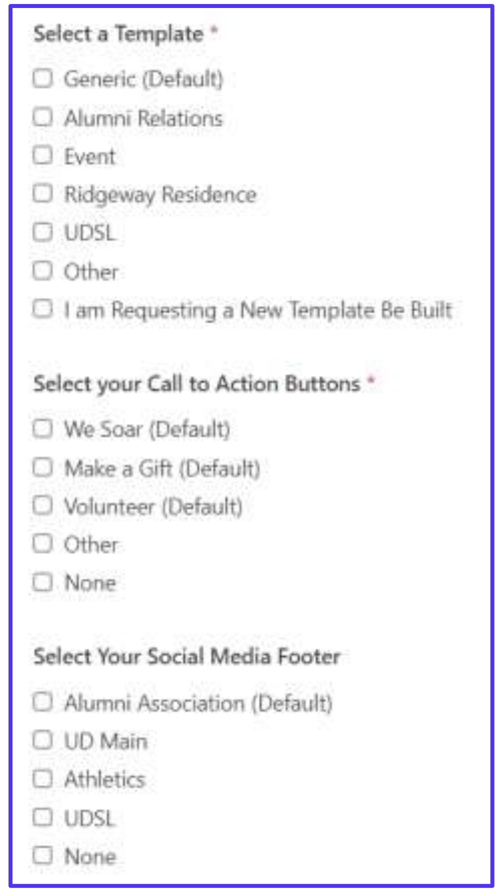
- **Include Organizations?** – Select whether organizations should be included or if this just targets individuals.
- **Household Recipients to Include** – Indicate whether the email targets just the head of household or if it should be sent to everyone in the household.

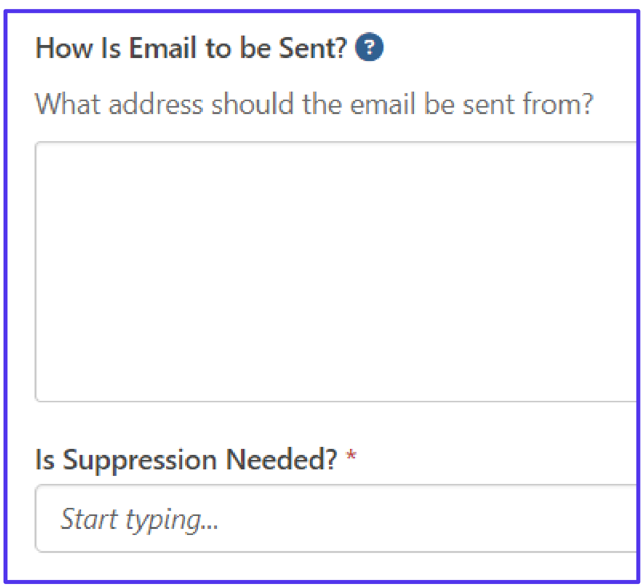


- **Records To Include** – This field gives you the option to provide what records you are looking for specifically. Please be as detailed as possible.
- **Email Opt-Outs to Exclude** – This multi-select drop-down lets you indicate the opt-out groups that should not receive the email.
- **Records To 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 “Yes” is selected, a “Suppression Audience” field appears.





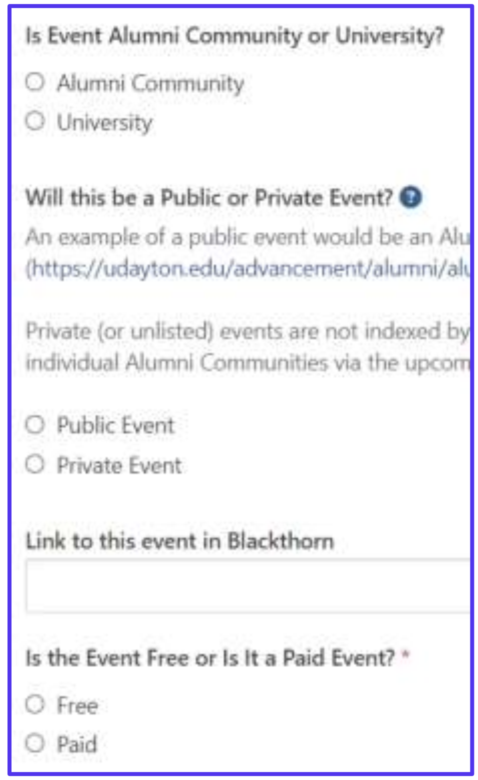
Event

The Event page has the most fields and options by far. This section will cover each of these along with the associated dependencies based off selections made in certain fields. The fields are presented in this document in no particular order with every effort made to keep each section as brief as possible.

Events Page 1a

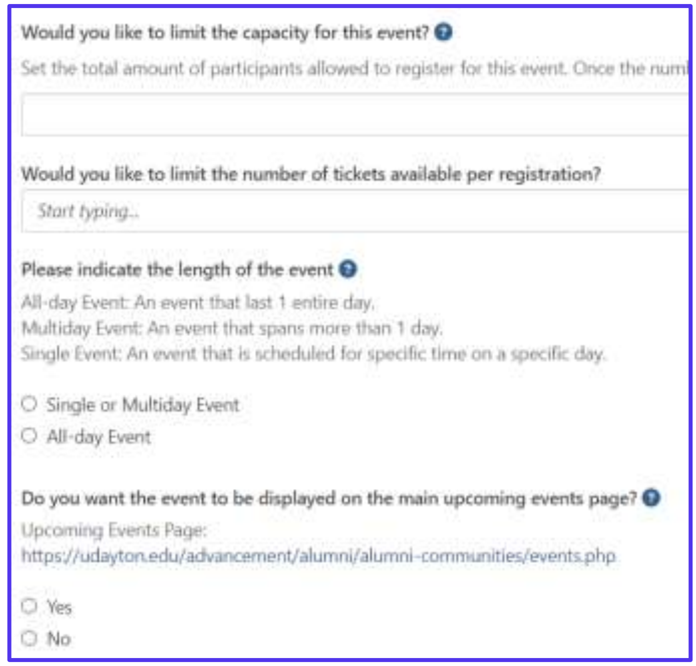
Not shown is the *Project Goal or Reason for Request* field. This field is where you can specify the goal or reason for the event if you wish to.

- **Is Event Alumni Community or University –** The selection made in this field will bring an additional *Event Webpage Copy* text field under the *Event Title* if "University" is chosen.
- **Will this be a Public or Private Event**? – The choice made in this field determines which field(s) become available in the next section regarding Alumni Community Pages that the event may be displayed on.
- **Link to this event in Blackthorn** – If there is a Blackthorn link, it can be entered here.
- **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.



Page 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.

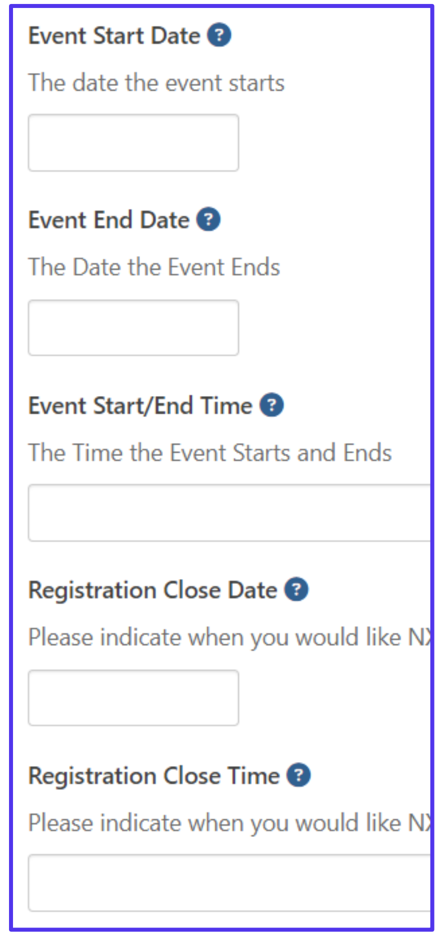


- **Would you like to limit the capacity for this event?** – This field is for the limit for the number of attendees to be entered.
- **Would you like to limit the number of tickets available per registration?** – This yes/no field asks if the number of tickets per registration should be limited. If "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 want to be included on the event page can be included here.

Events Page 2a

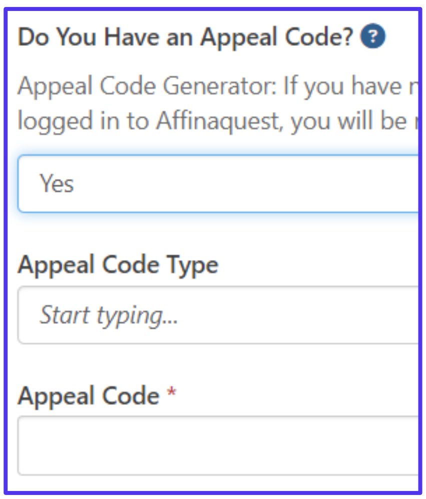
The section starts in with important dates for the beginning stages of the event page project.

- **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 note when event registration should close.
- **Registration Close Time** – This field allows you to enter the time that registration should close on the date entered above.



Events Page 2b

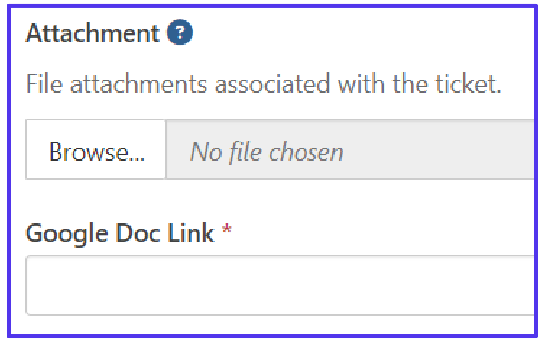
This section covers the appeal code field. Enter appeal code information only if your project has one. You may otherwise leave this field blank or select "No" from the drop-down.



- **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.

Events Page 3a

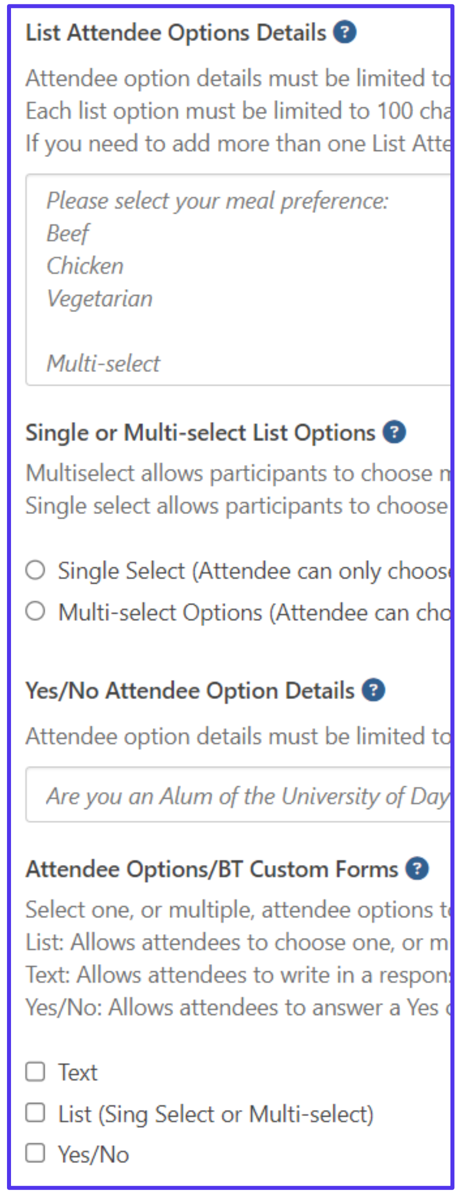
There should always be a Google document associated with your project. This section allows you to enter the link to the Google doc. You also have the option to attach any other documents that are pertinent to the project.



- **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.
- **Google Doc Link** – This field is required, and it where you can provide the link to the Google document that this event request is associated with.

Events Page 3b

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

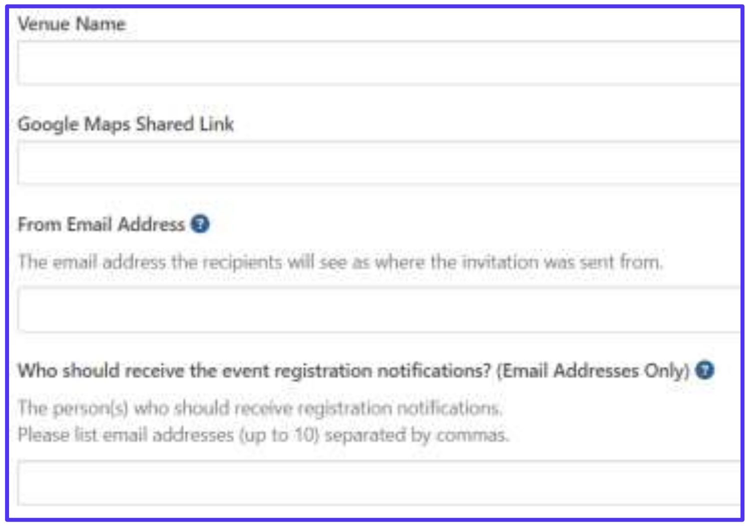


- **List Attendee Option Details** – This section provides the opportunity to detail any options that event attendees may have, such as choice of meal, events they like attending, and anything else you may wish to convey. This section continues with important dates and times relating to the event.
- **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.

Events Page 4a

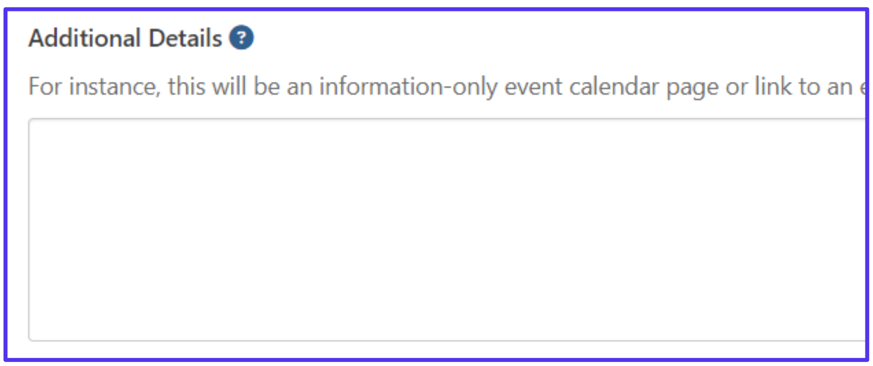
This section covers the name of the venue and more about the event.

- **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.
- **From Email Address** – Enter the email address that you want to be associated with the event, if needed.
- **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.



Events Page 4b

This final section is where you can enter any other information that you wish to include in the event request. This will come over to the child ticket.



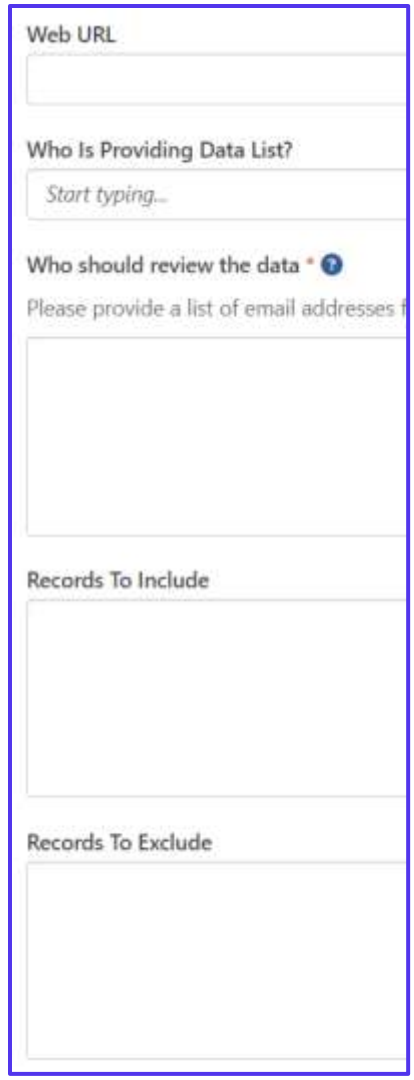
Mail or Print

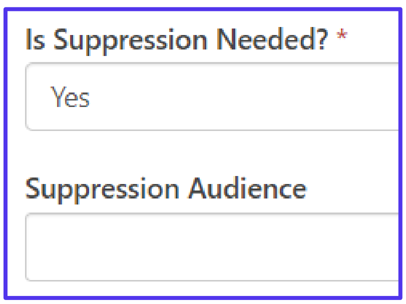
If you need a printed piece that needs to be mailed, select this project type. The following section goes over the fields associated with this project.

- **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.

- **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,” and a new field, “What Is Data Being Used For?” appears below the “Who should review the data?” field.
- **Who should review the data?** – A list of draft reviewer email addresses can be added 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.
- **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.
- **Is Suppression Needed**? – A simple yes/no field that ties into the data request. If “Yes” is selected, a “Suppression Audience” field appears.

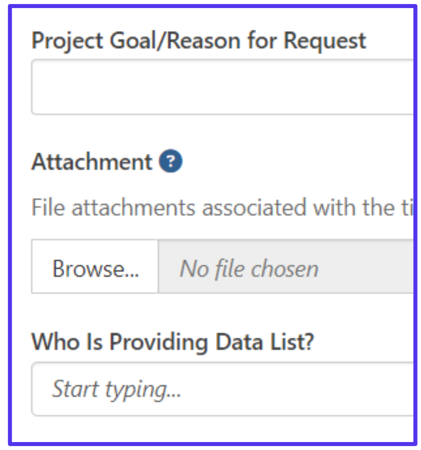




Data Request

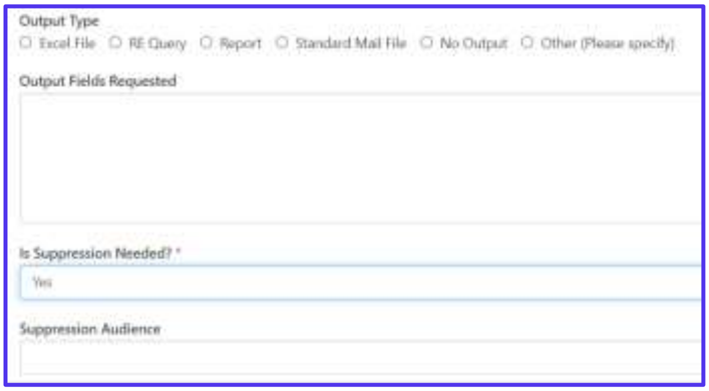
The data request project type is similar to both the email and mail type in much of the fields. This project type should be chosen only if a request for data is all that is needed. The other project types that might require a data pull (email, mail, texting) already have the data pull request built into them if ADV IT is responsible for the data.

- **Project Goal/Reason for Request** – This field, not required, allows you to briefly explain the goal or reason for requesting this project.
- **Attachment** – Not a required section, but it is here in case you want to attach a document, spreadsheet, or other file.
- **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?** – A list of draft reviewer email addresses can be added here (limit of 5). This field is required.
- **Intended Use** – This field allows you to give a general idea of what the date will be used for.
- **Date Needed** – List the date that this list should be ready.
- **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 multi-select field applies only to data pulls which involve email communication. Click the drop-down to bring up the list. Click to select a single solicit code. If selecting more, hold down the Ctrl key on your keyboard and click to select multiple codes.
- **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 –** You can select the type of output that you want. The output type can be detailed in the next field.
- **Output Fields Requested –** This field allows you to detail what fields you want to appear in the output.
- **Is Suppression Needed**? – A simple yes/no field that ties into the data request. If "Yes" is selected, a "Suppression Audience" field appears.


Output Type
Excel File RE Query Report Standard Mail File No Output Other (Please specify)
Output Fields Requested
Is Suppression Needed? *
Yes
Suppression Audience

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)	Final
1.1	8/27/2024	Fremder	Removed Texting section, updated Events (DN)	

Review & Approval

Requirements Document Approval History

Approving Party	Version Approved	Signature	Date
Nichole Rustad	1.1		
Doug Bishop	1.0		8/13/2024
Staci Grant	1.1		

Requirements Document Review History

Reviewer	Version Reviewed	Signature	Date