UNIVERSITY OF OREGON FOUNDATION

Information Technology Work Order Request Form Instructions

GENERAL INFORMATION

Work Order Request Form Location: www.uofoundation.org/resources/forms.php

Authorization: The following personnel are authorized to request information from the Benefactor system:

- UO Foundation Personnel
- UO Development: Regional and Constituency Development Officers; Central Services Personnel
- UO Alumni Association
- All Other UO Advancement Units (KWAX, Gov't Relations, Office of VP for Advancement, etc.)
- UO Schools/Colleges/Programs Faculty & Staff – Requests must be authorized by the CDO representing their area.
- All other University requests must be authorized by the Office of Development
- Contact Information: UO Foundation Help Desk: helpdesk@uofoundation.org (302-0338) Send Completed Work Orders to workorders@uofoundation.org (302-0305)
- Requests must be related to the overall fundraising initiatives of the University of Oregon

Planning and Submitting Your Request: To ensure you receive your desired results, fill out the Work Order Request form completely.

- Turnaround: All requests take at least fourteen business days.
- Rush Requests: Work Order Requests needed in less than fourteen business days are considered a RUSH and will need approval by the Foundation representative reviewing all requests (541-302-0305). These requests are heavily scrutinized.
- Assistance: If you need assistance filling out the form, call the Business Technology Help Desk at 541-302-0338.
- Submitting Requests: Send completed Work Order Request forms **as an attachment** to the Information Technology department (workorders@uofoundation.org).
- Tracking: A Help Log number (HL#) is assigned to your request once received by Information Technology. A confirmation email will be sent to you once your request is entered into their tracking database. Expect this email to arrive by the next business day and review the information upon receipt. Use this HL# when inquiring about your request.

FILLING OUT THE WORK ORDER REQUEST FORM

Field descriptions below are presented in the tab-order which they appear on the Work Order Request form.
Instructions:

- Starting in the first field, [Tab] through the fields entering relevant information.
- If you run out of room in a field, include additional notes at the bottom of the page.

1. Contact Name/Authorized Name: Name of requestor; if that person is not an authorized requestor, then include the UO Development staff member who has approved the request. If your name is not in the drop down menu, fill in your information in the Additional Contact field.

2. Additional Contact Email Address(es): If you will be away during the processing period of this request, list someone who can answer questions about this request.

3. Solicitation: Select Yes if the information you are requesting is for direct solicitation of funds.
    - If "Yes," you must call the Annual Giving Program (346-2114) to request a Solicitation Code and Date Stamp. Enter the code and date stamp in the Solicit Code field.
    - This is used for tracking purposes and should be included in the response portion of your mailing/envelope for proper allocation of donations upon receipt by the UO Foundation.

4. Date Submitted: Current date (m/d/yy). This will auto-fill for the current day. Override is possible.

5. Expected Delivery Date: Date that you need to receive information; an actual date (mm/dd/yyyy) is required (i.e., do not write "ASAP"). Estimated turnaround time for all requests is fourteen business days. (turnaround times are based on the number of business days from the day IT receives the request)
    - If a Count is needed first list the date Count is needed.
    - Counts depend on the Pairing of the output. Always include a pairing selection for counts.
    - Work Order Requests needed in less than fourteen business days are considered a RUSH and will need approval by the Foundation representative reviewing all requests (541-302-0305). These requests are heavily scrutinized.

6. Title of Request: Use a title that is a clear definition of your request. This "title" will appear in the header of the final output.

7. Related Previous Help Log Information: *Has this information been requested previously by your Department?* Go to the Web contacts menu, select Help Log Tracking to search for the HL# and date of the previous request, enter this information in the appropriate fields. (**Click "Look up previous help logs" for help on this field**)

8. Will you request this information again? If you will need this report re-run in the future, select "Yes" and enter the approximate date, month, or time of year.
    - The next time you request this report, refer to the HL# assigned to this current report in the *Related Previous Help Log Information* section.

9. Purpose of Request: Must be directly related to fund raising and/or advancement purposes.

10. Summary of the Information you are Requesting: Briefly describe the information you are requesting.

11. Type of Request: Select the request type from the drop-down menu; listed below are the descriptions and examples of these types.
    a) General Querying/Prospecting (no mail cleanup)
        - Example: List of all Law alums who have given above $100 in the last two years.
    b) Invitation, mailing and prospecting lists; (mail cleanup)

    - Example: compile a list of all donors in Orange County, CA, who have given $1,000+ for an invitation list we are compiling

  c) Research
    - Investigating a process, report, calculation
    - Example: "The Smiths are not showing on our stewardship report even though they have given above the required amount. Find out why."

12. <u>Report Name</u>: Select the report type in which you would like your output. Unless otherwise noted below, output for these reports can be any of the options listed in the *Output Type* section of the form.(Click on the hyperlinked "Report Selection" field to view headers of each report)
    - <u>XP4I</u>: **<u>Prospect Details Report</u>** (Includes name, city & state, UO degrees, MPS code & relationship manager, capacity information, largest & last gift, last 5 contacts; Does NOT include spouse; pdf only)
    - <u>PLWG</u>: **<u>Prospect List With Giving</u>** (Includes home & business addresses, phone, email, and life to date giving; household only; Excel or pdf)
    - <u>PLWTX</u>: **<u>Prospect List With Transactions</u>** (Includes home & business addresses, phone, email, and last 10 transactions; household only; pdf only)
    - <u>PLWOG</u>: **<u>Prospect List Without Giving</u>** (Includes home & business addresses, phone, and email; individual or household; Excel or pdf)

13. <u>Pairing</u>: Mark the box that indicates how you would like the individuals paired in your output file. Mark only one of the three (3) options:
    - <u>Individual</u>: One report entry per person will be produced. For example, if John and Mary Doe both meet the selection criteria, each will be included separately.
    - <u>Household</u>: One report entry per household will be produced.
        a. <u>Always Include Spouse</u>: Spouse name is always included in output if either individual meets the selection criteria.
        b. <u>Include only when both meet Criteria: Spouse is included only when spouse also</u> meets the selection criteria.

14. <u>Specify Sort</u>: Specify the order in which you want to receive the output (if relevant).

15. <u>Count</u>: *Would you like to receive a count first?*
    You will be contacted with a count of records that meet your selection criteria prior to the report output being finalized. This gives you an opportunity to adjust the criteria resulting in increasing or decreasing the count.

16. <u>Highest Desired Record Count</u>: If you are expecting to not exceed a total number of records, enter the expected or desired record count. If this number is exceeded, the report will either be narrowed based on the next field, or a Data Extraction Specialist will call you to discuss adjusting the criteria to meet your expectations.

17. <u>Narrowing your Report</u>: *How would you like the data narrowed if desired record count is exceeded or not met?*
    Indicate how you would like to tweak the criteria in order to decrease or increase the record count. This will save time for the Data Extraction Specialist, allowing him/her to narrow your pool without having to contact you.

18. Other Groups to Include: Note any other groups you would like to include in the selection criteria (e.g. trustees).

19. Other Groups to Exclude: Note any other groups you would like to exclude in the selection criteria (e.g. deceased).
    a. NOTE: All **mail** requests will automatically exclude individuals with the following Mail Rule codes: BA = bad address, NC = no contact, TA = Temporarily Away, and UC = No UO Connection. If you need any of these groups included in your output, please indicate so in Other Groups to Include or Additional Instructions, Notes or Criteria on page 2 of the work order form. It is policy to exclude NCs on mailing or invitation lists.

DEMOGRAPHIC CRITERIA: The criteria you enter in the fields outlined below will be used to narrow the pool. If you leave a field blank, it is assumed that you do not want to narrow the pool by that parameter ("All" is assumed). Include notes on additional criteria in the *Other Criteria* section of the form.

1. Reunion Class Year: The preferred graduation class with which selected alumni wish to be associated.

2. Student Interests: Organized activities and/or groups in which the selected alumni were involved prior to graduation (e.g., Fraternities/Sororities, Honorary Societies, Varsity Sports, Student Government, etc.).

3. Degree Year: The actual year the selected alumni were awarded their degrees.

4. Affiliation: Organized activities and/or groups in which the selected alumni are/were involved after graduation (e.g., School Advisory Councils, Alumni Boards, "Friends" groups, etc.).

5. Degree Type(s): The degrees the selected alumni were awarded (e.g., BA, BS, MA, MS, Ph.D., etc.); request "NODs" (no degree awarded) if you want those to be included.

6. School or Division: The specific school/college or division from which the selected alumni graduated or which they attended.

7. Majors: The specific major(s) in which the selected alumni received their degree.

8. Publication Code: Constituents who have a Publication Code for mailing publications produced by the University and other affiliated groups. The selection will include those constituents on the publication mailing list.

9. Region: Alumni Chapter: Select the UOAA Alumni Chapter from the dropdown field in which the selected alumni reside.

10. Region: City or County (will narrow exactly): The cities and/or counties in which the selected alumni must reside. You can also specify former residences as well. NOTE: this is narrowed on the exact city or county and **will not include metropolitan or surrounding areas**.

11. Region: State (will narrow exactly): The states in which the selected alumni must reside. You can also specify former residences as well. NOTE: this is narrowed on the **exact** state.

12. Region: Country (will narrow exactly): The countries in which the selected alumni must reside. You can also specify former residences as well. NOTE: this is narrowed on the **exact** country.

13. Region: Zip code(s), Range(s): The zip code(s) or ranges in which the selected alumni must reside. You can also specify former residences as well.

14. US Only / Worldwide Residents / Both: Mark whether the selection criteria should include US Only, Worldwide Only or Both.

15. Include Companies: Mark the box if you would like companies, corporations or foundations included in the selection criteria. If you wish these to be separated out from the rest of the output, indicate in the *Other Output Specifications* field.

GIVING CRITERIA: The criteria you enter in the fields outlined below will be used to narrow the pool. If you leave a field blank, it is assumed that you do not want to narrow the pool by that parameter ("All" is assumed). Include notes on additional criteria in the *Other Criteria* section of the form.

1. Date Range: All gift history inquiries must include a specified date range. Enter the specific date range(s) of the gift or pledge history you are requesting. If you would like the selection based on fiscal year, indicate as 00-01 or 7/1/00-6/30/01. LTD (Life to Date) giving is assumed if left blank.

2. Div. or Dept. (Division or Department): Include the specific divisions and/or departments to which money was donated that you want included in the giving selection criteria. Example: Arts & Sciences; Biology Dept.

3. Gift Amount or Range: Enter the specific amounts or ranges that you want to include in your selection criteria. NOTE: Indicate under *Output* (in the *Other Output Specifications* field) if you need ranges reported separately. Mark the box indicating whether you want the specified gift amount counted as a *Single Gift* or *Cumulate Giving* amount.

4. Equity Name or Number: Enter the names and/or numbers of the equities to be included in selection criteria. Equities will be grouped by department and then by division.

5. Include: Specify whether to include:
    - Money In: (GF, PP) Outright gifts and pledge payments (use this option when desired output is only "money in the door")
    - Money Promised: (GF, NP) outright gifts and new pledges (use this option when desired output is all commitments made by an individual or entity) NOTE: including new pledges will not result in an accurate accounting of a donor's giving history to the UO.
    - Matching Gifts: matching gifts made by company(ies) on behalf of the individuals who meet the other giving criteria.