

# Development Services Help Site

# How can Development Services help you??



- Easily find help by System, Service or the Team you are most familiar with
- One stop shopping
- Top Searches menu for most requested services

# What can we do for you?



- Updates to donor and alumni records
- Data/mailing file creation
- Help with creating development data reports
- Answers to questions about EIS, Business Objects, Development Data Warehouse, Development Mainframe
- Help with processing a gift
- Assistance in creating or updating a giving site
- OUD users can submit help desk tickets

# What do you mean by System?



## **Systems Development Services Supports:**

- DevContacts
- Development Data Warehouse
- Development Mainframe
- Business Objects
- DevNet/Development Intranet
- Executive Information System (EIS)

# What do you mean by Service?



If you know the general type, function, or activity for which you need help, you can start your request by Service.

- **Data Services**
  - Development Data
  - Development Record Updates
  - Segment Loads into Kintera
- **Online Services**
  - Online Giving Sites
- **Technical Services**
  - System Access
  - OUD Technical Support

# What do you mean by Team?



- Gift & Records Administration
- Data Management Team
- Information Deployment & Analytics
- Web, Data Integration & Network Support
- Prospect Management

# How do I make a request for service/help?



- Try the Top Searches!
- Select one of the three categories along the left side

# Can you show me an example?



**Example 1:**

**Gift Adjustments on the Top Searches**



# Development Services

Advancing the U-M Development Community

## Browse by System

- Business Objects
- DevContacts Application
- Development Data Warehouse
- DevContacts 3
- Development Mainframe
- DevNet / Development Intranet
- Executive Information System (DAC EIS)
- ROI Updates

## Browse by Service

## Browse by Team



## How can Development Services help you?

Development Services is your one-stop shop for:

- Report creation and assistance, as well as analysis of development data
- Web programming, data integration, desktop & network support for OUD colleagues
- Gifts and development records administration

## Announcements

### What's New as of February 1, 2010

- Roll over pop up hints and tips for easier navigation
- Bulleted lists of services on the Team information pages
- A new way to view previously submitted tickets

## Need training?

View training opportunities and register for sessions [here](#)

## Top Searches

- [Mailing Label Request](#)
- [Batch Record Updates](#)
- [DevNet Access](#)
- [Campaign Reporting](#)
- [Record Updates](#)
- [Exec. Info. System \(EIS\)](#)
- [EIS Updates](#)
- [ROI Updates](#)
- [Gift Adjustments](#)



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https://devweb.dev.umich.edu/services/development/index.php?base=team&page=gra

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Development Services

**Browse by System**

**Browse by Service**

**Browse by Team**

- Data Management
- Gift & Records Administration
- Info. Deployment / Analytics
- Prospect Management
- Web, DI & Network Support

## Gift and Records Administration

### What do we do?

We record and generate receipts for all gift and pledges to the University. Including:

- Checks
- Cash
- Credit
- Securities
- Gifts-in-Kind


We maintain the alumni and friends records. Including:

- Adding new graduates
- Updating existing records
- Cleansing data

We ensure compliance with IRS regulations, Governmental Accounting Standards Board (GASB) accounting standards, and Council for Advancement and Support of Education (CASE) counting standards for all gifts to the University.

### GRA Services Offered

<input type="checkbox"/> Alumni Records
<input type="checkbox"/> Constituent Records
<input type="checkbox"/> Gift Processing Help
<input type="checkbox"/> Gift Adjustments
<input type="checkbox"/> Gift-in-Kind
<input type="checkbox"/> Securities



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Development Services

We ensure compliance with IRS regulations, Governmental Accounting Standards Board (GASB) accounting standards, and Council for Advancement and Support of Education (CASE) counting standards for all gifts to the University.

### GRA Services Offered

<input type="checkbox"/> Alumni Records
<input type="checkbox"/> Constituent Records
<input type="checkbox"/> Gift Processing Help
<input type="checkbox"/> Gift Adjustments
Please click on the Open Request arrow below to submit your request for the following: <ul style="list-style-type: none"><li>▪ Adjusting a gift amount</li><li>▪ Allocation corrections</li><li>▪ Donor corrections</li><li>▪ Editing solicitation codes</li><li>▪ Pledge payment corrections</li><li>▪ Securities corrections</li></ul>
<input type="checkbox"/> Gift-in-Kin <input type="button" value="Open Request"/>
<input type="checkbox"/> Securities

**View / Open** →

**How can we help?** Pam McLeod and Nancy Gould are our customer service representatives. For help call: **734 647-7777**  
The University of Michigan, Office of University Development, Development Services

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https://helpdesk.lib.umich.edu:60017/project90.asp Trusted sites 100%

# Why Authenticate?



- Authentication ensures the security of the information.
- Auto population of your contact information

# What does the new ticket view look like?



- You will see your personal dashboard with a list of previously submitted tickets
- You can submit a new ticket request

# Important Changes



- **NOTE: Important Changes!**

When submitting a new request:


- Click on the Submit Request icon to **CREATE/OPEN** a new ticket.
- Click on the Save icon **SAVE** to **SEND** your ticket.
- Click on the Home icon to return to this screen and view your list of tickets.

**IMPORTANT:** After you **SAVE/SEND** your ticket, you will return to the home page with your new request in the list.

FootPrints - Windows Internet Explorer provided by Office of University Development


https://helpdesk.lib.umich.edu:60017/MR.cgi/MRhomepage.pl


Development Services


Home  Submit Request

## Welcome! You are now viewing your tickets for OUD - Gift Adj

From this screen you can view your list of submitted tickets as well as create/open new tickets all in one place.

Click on the Submit Request icon  to **CREATE/OPEN** a new ticket.

Click on the Save icon  **SAVE** to **SEND** your ticket.

Click on the Home icon  to return to this screen and view your list of tickets.

**IMPORTANT:** After you SAVE/SEND your ticket, you will return to the home page with your new request in the list.

Display **My Requests** Refresh

Ticket #	Last Edited On	Status	Email Subject:
5	12/22/2009	Closed	New Request
4	12/08/2009	Closed	New Request
3	11/20/2009	Closed	New Request
2	11/18/2009	Closed	New Request
1	11/18/2009	Closed	New Request

Done Trusted sites 100%

https://helpdesk.lib.umich.edu:60017/MRcgi/MRTicketPage.pl?USER=ulib-fp-oud-giftadj&PROJECTID=9 - Windows Internet Explorer pro

https://helpdesk.lib.umich.edu:60017/MRcgi/MRTicketPage.pl?USER=ulib-fp-oud-giftadj&PROJECTID=908MRP=0i

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# Development Services

Home Submit Request

**SAVE** ←

Submit a new Request -- General Information

**Email Subject:\*** New Request

**Priority\*** Low - Completed within the month.

Contact Information

<b>Display name</b>	Pamela E Mcleod	<b>User ID</b>	pmcleod	<b>Email Address</b>	pmcleod@umich.edu
<b>Affiliations</b>	VP for Development	<b>Phone Number</b>	+1 734 647 1962		

Ticket Information

**Please remember to attach all relevant back-up. For example: G145A screen, emails, gift transfer forms, etc.**

If these choices do not fit your request type, please select "Other".

**Gift Adjustment Kind:** No Choice

Please give details in the description when choosing more than one type of request.

**I have more than one kind of request:**

**Adjustment Area:** No Choice

Description\*

Done Trusted sites 100%



# How will I know it's been received?



- You will see a confirmation screen
- You will return to your dashboard and the new ticket will now appear in your list
- Email:
  - Upon Receipt
  - Team member assigned
  - More information needed
  - Upon Completion

# What if I need some help along the way?



- Getting help is a phone call away with the 7's

# So what is new as of Feb. 1<sup>st</sup>?



- Pop up navigation hints
- Clear, bulleted list of services on Team pages
- The ability to view your previously submitted tickets as well as create new requests

# Questions??