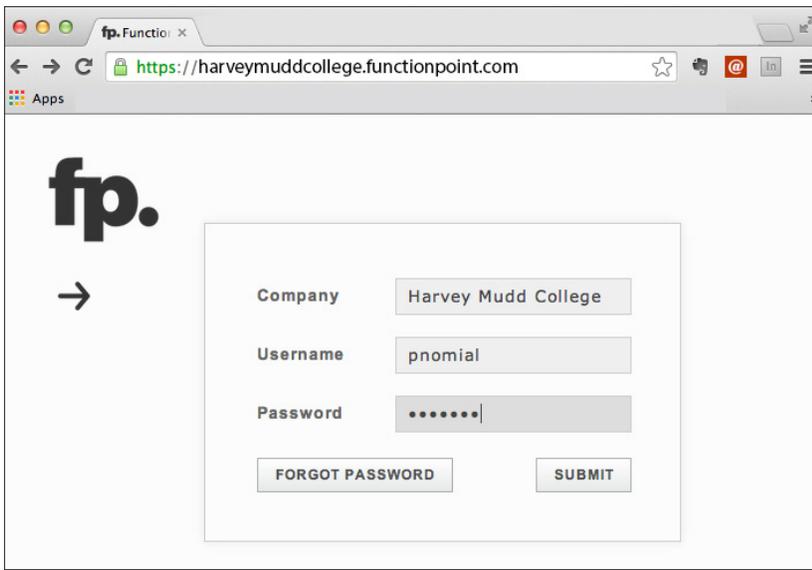


Communications and Marketing has launched an online project request system. All requests should be completed using the new online system. To request an account, contact Kimberly Taylor-Pestell by calling 909.607.9298 or email [ktaylorpestell@hmc.edu](mailto:ktaylorpestell@hmc.edu). Instructions for using the FunctionPoint system are below.

**Logging In**

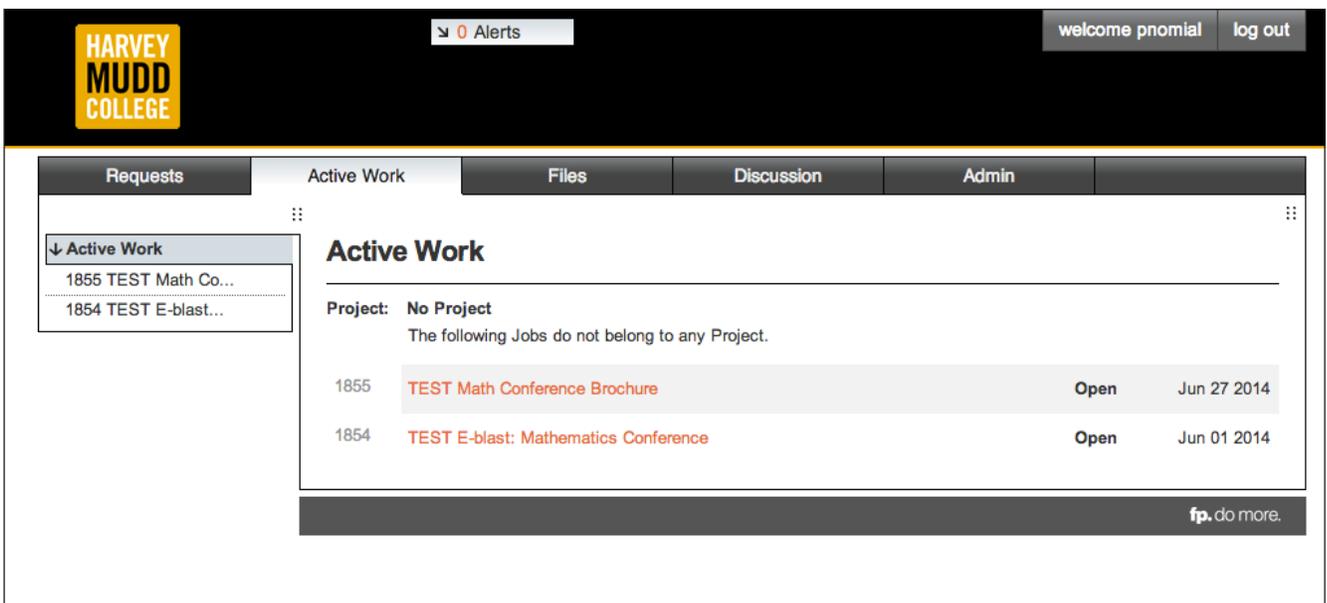


To log in, visit <http://harveymuddcollege.functionpoint.com> and enter “Harvey Mudd College” in the **Company** field, along with your username and password. Your username and password will be initially set to your **firstinitiallastname**.

After logging in for the first time, you will be asked to change your password.

**Active Work**

The first screen you see after logging in is your **Active Work**. If you have projects already in the system, those will appear here. To request a new project, choose the **Requests** tab to the left of the **Active Work** tab.



The screenshot shows the 'Create A New Request' form in the Project Request System. The form is titled 'Create A New Request' and has a 'Start' button. The form includes the following fields:

- Request Name:** Annual Giving Brochure \*
- Delivery Date:** Jul 31 2014
- Brief Template:** Creative Brief \*
- Budget:** 2500.00
- Office:** Harvey Mudd College \*
- Account Executive:** Janice Gilson \*
- Company Name:** Harvey Mudd College \*
- Key Contact:** Polly Nomial \*
- Description:** Brochure for the annual giving year-end solicitation.

At the bottom of the form, there are two buttons: 'Save As Draft' and 'Save & Next'. A footer at the bottom right of the form says 'fp. do more.'

On the left sidebar, there are two buttons: 'Create a new request' and 'View draft requests'. On the right sidebar, there is a section titled 'Create A New Request' with the following text:

Fill in the appropriate information to request work for which you would like to receive an Proposal.

Once an Proposal has been created, you will be able to view and approve, or decline the Proposal, in the Approval area.

### Create a New Request

Choose **Create a new request** to begin your project request. For the Request Name field, please enter a descriptive name of your project (for example, Annual Giving Brochure). Enter the **Delivery Date** and then choose the **Brief Template** (type of project). There are two possible options: **Creative Brief** or **Email Marketing Brief**. The Email Marketing Brief is used for requesting email blasts. All other requests should be made using the Creative Brief template.

### Account Executive

For writing projects, please choose Stephanie Graham. For design and other creative projects, choose Janice Gilson. For email marketing, choose Kimberly Taylor-Pestell. If you are unsure who to select, choose Tim Hussey and an account executive will be assigned as appropriate.

Please enter a brief description of your project. Once you have completed all the required fields (indicated with a red \*) choose the **Save & Next** button.

Requests	Active Work	Files	Discussion	Admin
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Create a new request

View draft requests

## Create A New Request

1 Start → 2 Questions → 3 Summary

CHECKLIST

The Office of Communications and Marketing is available to assist you in developing a comprehensive project plan, including strategic objectives, and align your plan with HMC's mission, branding elements and editorial quality standards.  
**Please complete one Creative Brief per job and make sure you have the following ready:** 1) Supervisor-Approved Final Draft in doc/docx format and 2) Image Files, if you have your own illustrations or photographs.  
**\*NAME OF PROJECT:**  
 Annual Giving Brochure

Is this a:

New job

Update/revision

Project delivery/drop date (if you have multiple pieces with separate delivery/drop dates, please list each here)

6/31/2014

Delivery instructions

Deliver to mail house

Who (besides you) needs to approve this project before it goes to print?

Dan Macaluso

Please select requested piece

- Advertisement (print or online)
- Apparel
- Awards
- Banner/Signage
- Brochure
- Catalog/Handbook
- E-blast art
- E-Newsletter
- Event Program

### Create A New Request

Fill in the appropriate information to request work for which you would like to receive an Proposal.

Once an Proposal has been created, you will be able to view and approve, or decline the Proposal, in the Approval area.

**Create a New Request: Questions Tab**

The form asks you again for the **Name of the Project** at the very end of the instructions at the top of the page. Please re-enter the name of the project from the first screen and indicate if this is a **New Job** or an **Update/Revision** to a previous job. Complete the fields being sure to select the type piece you are requesting.

**NOTE:** If requesting more than one type of item, you will need to complete a separate form for each since each project is tracked and scheduled individually by Communications and Marketing.

Promotional Item  
 Table tent  
 Web page/Website  
 Other

If you selected OTHER, please specify:

Target audience  
 Alumni who have given to HMC this year. \*

What messages or key points do you want to convey with this project?  
 AMF gifts benefit current students and faculty research (see attached copy) \*

Is there a call to action? If so, please describe.  
 Visit www.hmc.edu/give to make a gift or use enclosed remit envelope. \*

Project Budget  
 2500.00 \*

Total quantity  
 3500 \*

Do you need this project:

Digital output (PDF) \*  
 Printed

Project elements: copy, photos, graphics (Please note that work cannot begin on your project until copy is approved): \*

Supervisor-approved copy attached  
 Copy not provided (writing assistance needed)  
 Copy coming soon (specify below)  
 Request photo shoot (new photos needed)

If copy is coming soon, please specify when we will receive it:

Upload any project elements in the fields below (supervisor-approved copy, photos, graphics) for use in this project. Acceptable formats for photos and graphics: PDF, PNG, TIF, EPS, JPG - 300 dpi or higher

Choose File Annual Giving Brochure Copy.docx

Additional special instructions

**Questions Tab (continued)**

Be sure to include your **Project Budget** for this request along with the **Total Quantity** you need.

In the case of a brochure or other publication that requires printing, we will request estimates from various vendors to meet your needs. If you are unsure about what to include, put a zero in the budget field, and in the **Additional Special Instructions** field at the bottom of the form, indicate that you need assistance estimating the cost for your project.

The form allows you to upload documents to share with Communications and Marketing (i.e., copy for your project, photos or other graphics you would like included, etc.).

Once you have completed the form, choose the **Save & Next** button at the bottom of the page (You may also choose to **Save As Draft** to come back to your request and complete it later).

After choosing **Save & Next**, any files you selected to share will be uploaded and you should now see an option to submit your request.

Choose the **Submit Request** button.



**NOTE: Your request has now been submitted. You will NOT see it appear in your Active Work tab until Communications and Marketing has reviewed the request and created a job in the system.**