

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. 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 displays the 'Project Request System' interface. At the top, there's a header with the Harvey Mudd College logo, a notification bell showing '0 Alerts', and user information 'welcome pnomial' with a 'log out' link. Below the header is a navigation bar with tabs: 'Requests', 'Active Work', 'Files', 'Discussion', and 'Admin'. The 'Requests' tab is active, showing a sidebar with 'Create a new request' and 'View draft requests'. The main content area is titled 'Create A New Request' and features a progress indicator '1 Start' with a right arrow. The form contains several 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), and 'Key Contact' (Polly Nomial). A large text area for 'Description' contains the text 'Brochure for the annual giving year-end solicitation.' Red asterisks (*) indicate required fields. At the bottom right of the form are 'Save As Draft' and 'Save & Next' buttons. A sidebar on the right provides instructions on how to use the system. The footer of the interface includes the 'fp. do more.' logo.

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
<p>Create a new request</p> <p>View draft requests</p>	<h2>Create A New Request</h2> <p>1 Start → 2 Questions → 3 Summary</p> <p>CHECKLIST</p> <p>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</p> <p>Is this a:</p> <p><input checked="" type="checkbox"/> New job <input type="checkbox"/> Update/revision</p> <p>Project delivery/drop date (if you have multiple pieces with separate delivery/drop dates, please list each here) 6/31/2014</p> <p>Delivery instructions Deliver to mail house</p> <p>Who (besides you) needs to approve this project before it goes to print? Dan Macaluso</p> <p>Please select requested piece</p> <p><input type="radio"/> Advertisement (print or online) <input type="radio"/> Apparel <input type="radio"/> Awards <input type="radio"/> Banner/Signage <input checked="" type="radio"/> Brochure <input type="radio"/> Catalog/Handbook <input type="radio"/> E-blast art <input type="radio"/> E-Newsletter <input type="radio"/> Event Program</p>			<h3>Create A New Request</h3> <p>Fill in the appropriate information to request work for which you would like to receive an Proposal.</p> <p>Once an Proposal has been created, you will be able to view and approve, or decline the Proposal, in the Approval area.</p>

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

Save & Previous Save As Draft Save & Next

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.

Submit Request

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.