Adhoc Report Request FAQ

How to fill out a report request?

Log on to <https://vandalweb.uidaho.edu/PROD/twbkwbis.P_WWWLogin?ret_code=0>. To get their directly, choose Advancement Officers tab and choose Vandal Advance at the bottom of that screen. Then choose Advancement Services Menu. From there to fill out a report request you would use “Request Data Report”, otherwise you can choose “View Requests”.

How to send a list?

 Send an email to advserv\_it@uidaho.edu with the list attached.

What data does customer get?

 Depends upon whether the customer checked the Giving Report or the Mailing Report. A Giving Report will give the customer all of the constituents that meet the parameters outlined with the past 5 years of giving history and lifetime giving history. In addition it will show the ID, Class Year, Confidential flag, Deceased, any Degrees achieved, Employer and Donor Clubs. A Mailing Report will give the name and spouse name broken out into each part, along with the email, phone and address. There are also two columns needed by Campus Mail to help with processing (ACSBatchCode and ACSKeyLine).

What data violations to be aware of?

Where is my report?

 Your report status is trackable using the VandalWeb page called “View Requests”, accessible from the Advancement Main Menu. The status displays if it has been assigned, who is working on the report, and any notes they make regarding the report.

How long to get report?

 Normally it will take 2 weeks to complete a report request. If you need it sooner than that AND can provide the Vnumbers (usually delivered from an Argos report) then we can turn around the report in 24 hours.

Can I get address and giving in same report?

 These are two separate types of reports, both in how it is processed and how it is completed and will garner separate results. Constituents will be included in the Giving Report and not in the Mailing List because of exclusions/prospect status/deceased/valid address information/etc. There are many Argos reports which can deliver giving information, and from that you can send in those Vnumbers and get a mailing list produced.

Who can request a report?

Qualified requestors include Assistant Deans, Directors of Development and their staff; the President’s Office staff; staff of Annual Giving, Prospect Research & Management, Advancement VP office, Alumni Relations, Athletics, Donor Relations & Stewardship, Foundation, Planned Giving, Corporate & Foundation Relations. Report requests for recognized student organizations, Greek Houses and other campus groups must be submitted by a qualified requestor.

Why do I have to fill out a request?

 We ask you to fill out a request so that we have a record of the types of requests being made. If similar requests are being made repeatedly, it is in our best interest to create an Argos report which allows the user to access the data on their own and not have to plan 2 weeks in advance. Projects are tracked, prioritized and assigned based on the information in the report request. The report request assures response, accountability and timely delivery of products and services.

Why are there addresses outside the region I specified?

 The addresses shown in the Mailing List are the preferred address, however there may actually be more than one address which is valid for a constituent. When we pull constituents for a list we are checking ALL addresses for each constituent and whether they meet the criteria. For instance, someone may live in Spokane for part of the year and Arizona for the rest of the year. If you are looking for people in Spokane to mail to, you \*might\* get the Arizona address instead. It is because that person has said the Arizona address is their preferred address, since they are only in Spokane for a portion of the year.

Is the request form working?

Support for the user is provided by the Primary Responder for report requests. Contact information: TBD

Who is working on my request?

 Your report status is trackable using the VandalWeb page called “View Requests”, accessible from the Advancement Main Menu. The status displays if it has been assigned, who is working on the report, and any notes they make regarding the report.

How do I modify my request?

 You can modify your report request up until the time the request has been assigned to someone. At that point, you will need to email advserv\_it@uidaho.edu and state the adjustment you need to your report. Depending upon where your report is within the process, this change may or may not be granted. Exceptions are resolved by the VP for Advancement or designee.

How do I elevate my request?

 You can elevate your report by emailing advserv\_it@uidaho.edu and state why you need to elevate your report. Depending upon where your report is within the process, this elevation may or may not be granted. Exceptions are resolved by the VP for Advancement or designee.

Why isn’t “Joe Vandal” in my list?

Typically this happens in Mailing Lists and it is because of exclusions/prospect status/deceased/valid address information/etc.

Why does a request take two weeks?

Some requests can be fulfilled in less than two weeks. The two week buffer allows Advancement Information Services to accommodate many different report requests while assuring data is updated to provide the best quality product. Some requests require special attention, research and data entry before the report or list is built.

If I provide V#’s, how long does it take to get a list?

 The list should be returned to you within two business days after receipt of V#s.