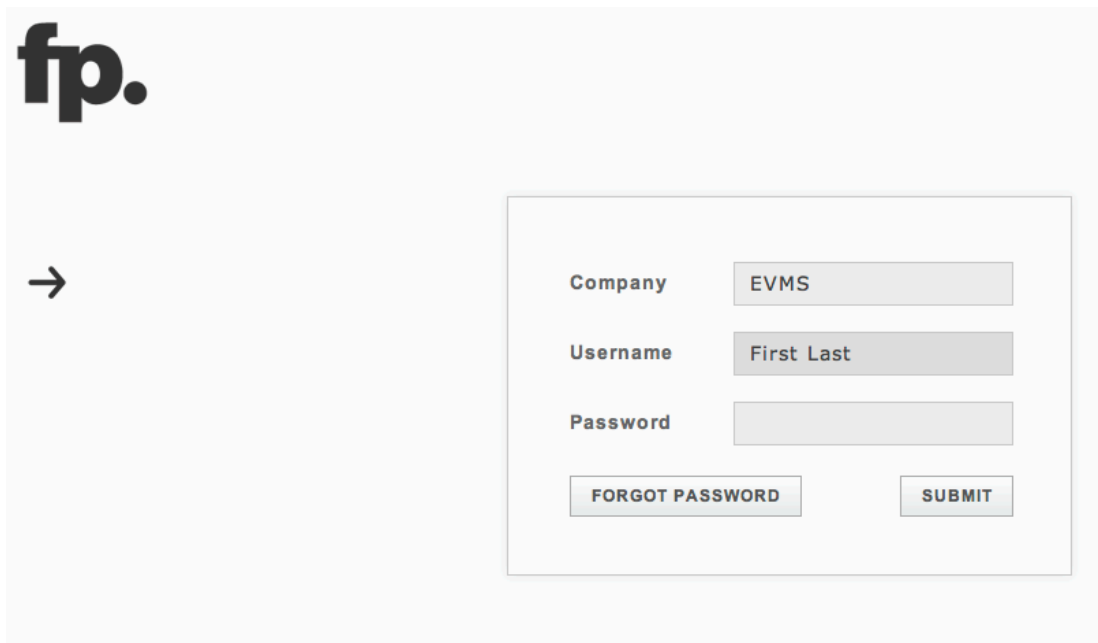


## Using the Function Point Client Portal

### Logging on

Go to the following URL- <https://evms.functionpoint.com>

You will see the log in box shown below



The screenshot shows the Function Point login interface. On the left, there is a large 'fp.' logo and a right-pointing arrow. To the right of the arrow is a login form with the following fields and buttons:

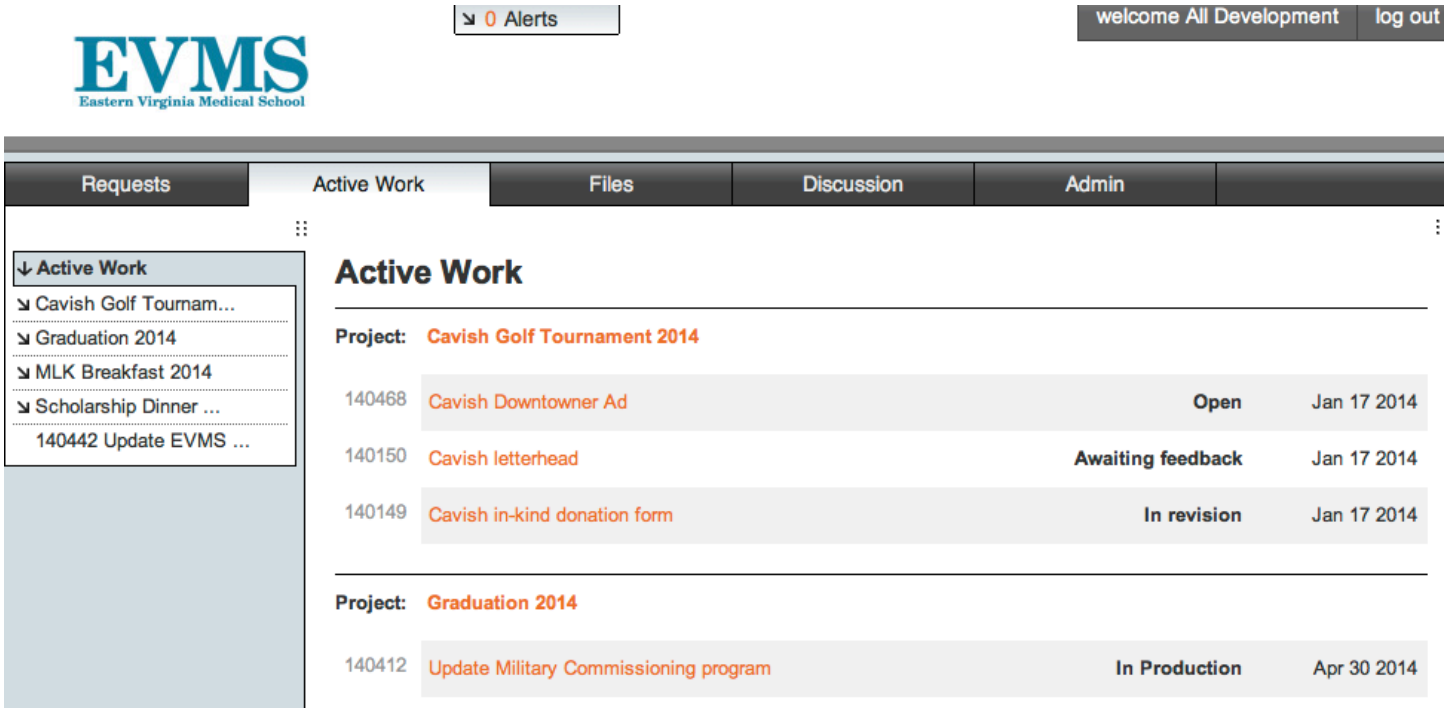
- Company:** A text input field containing 'EVMS'.
- Username:** A text input field containing 'First Last'.
- Password:** A text input field.
- FORGOT PASSWORD:** A button located below the password field.
- SUBMIT:** A button located to the right of the 'FORGOT PASSWORD' button.

Log in info (this is case sensitive):

- Company: EVMS
- Username: your first and last name. This is your official name of record (not a nickname or preferred name). Typed just like it would normally be with capital first letters and a space in between (ex. Joe Sample)
- Password: your first initial and last name (no spaces and all lowercase).

# Active Work page

This is the first page you will see after logging on.



**EVMS**  
Eastern Virginia Medical School

0 Alerts

welcome All Development | log out

Requests | **Active Work** | Files | Discussion | Admin

Active Work

Project: **Cavish Golf Tournament 2014**

140468	Cavish Downtowner Ad	Open	Jan 17 2014
140150	Cavish letterhead	Awaiting feedback	Jan 17 2014
140149	Cavish in-kind donation form	In revision	Jan 17 2014

Project: **Graduation 2014**

140412	Update Military Commissioning program	In Production	Apr 30 2014
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From this page you will see all of the open jobs that you are listed as a contact for, what their production status is, and the due date for each job.

# Job Details

Click on any of the jobs in the active work section to view additional details.

The screenshot displays a web application interface for job management. At the top, there are navigation tabs: Requests, Active Work (selected), Files, Discussion, and Admin. On the left, a sidebar under 'Active Work' lists several jobs: 1005 New job sample, 1004 Poster Test, 1003 Postcard TEST (highlighted), and 1002 Event HTML i... The main content area is titled 'Job Details' and shows information for job 1003. The details include: Company Name: DEVELOPMENT; Job Name: Postcard TEST; Job Number: 1003; Job Date: Dec 09 2013; Status: In Production; Job Type: Postcard; Client PO: (empty); and Description: (empty). Below the details are sections for Links, Notes, Files, and Reports. The Links section is currently empty. The Notes section contains one note from Kelley Jackson dated Dec 09 2013 1:18 PM, titled 'Donor quote', with the text 'Need a donor quote for the copy by January 17.' and one comment. The Files section shows a PDF file named 'CAncer\_white\_paper.pdf' uploaded on Dec 11 2013, 136 KB, by Kelley Jackson. The Reports section lists 'Job Request' (PDF - Job Request 5) and 'Schedule' (PDF).

**Notes-** Any questions or comments can be communicated in this section. When you add or comment on an existing note, an alert is sent to the account executive for that particular job. If someone from MarComm posts a note, you will be sent an email. Files can also be added to notes.

**Files-** Both MarComm and your department can upload files to this section. Some examples of the uses of this section are to send proofs, photo options, copy for review, etc. Once again when you add or comment on an existing note, an alert is sent to the account executive for that particular job. If someone from MarComm uploads a file, you will be sent an email.

**Job request report-** This PDF is a copy of the request that you submitted to start the job.

# Submitting a new job request

Step 1: Navigate to the requests page

The screenshot shows the EVMS website header with the logo and navigation tabs: Requests, Active Work, Files, Discussion, and Admin. A red arrow points to the 'Requests' tab. Below the navigation, the 'Active Work' section is displayed, showing a list of projects under the heading 'Active Work'. The projects listed are:

Project ID	Project Name	Status
140468	Cavish Downtowner Ad	
140150	Cavish letterhead	Awaiting fee
140149	Cavish in-kind donation form	In re

Step 2: Begin to fill in the request details. Anything marked with a red asterisk is a required field.

- The request name is the name of your job (i.e. Dr. X bio card), not your name.

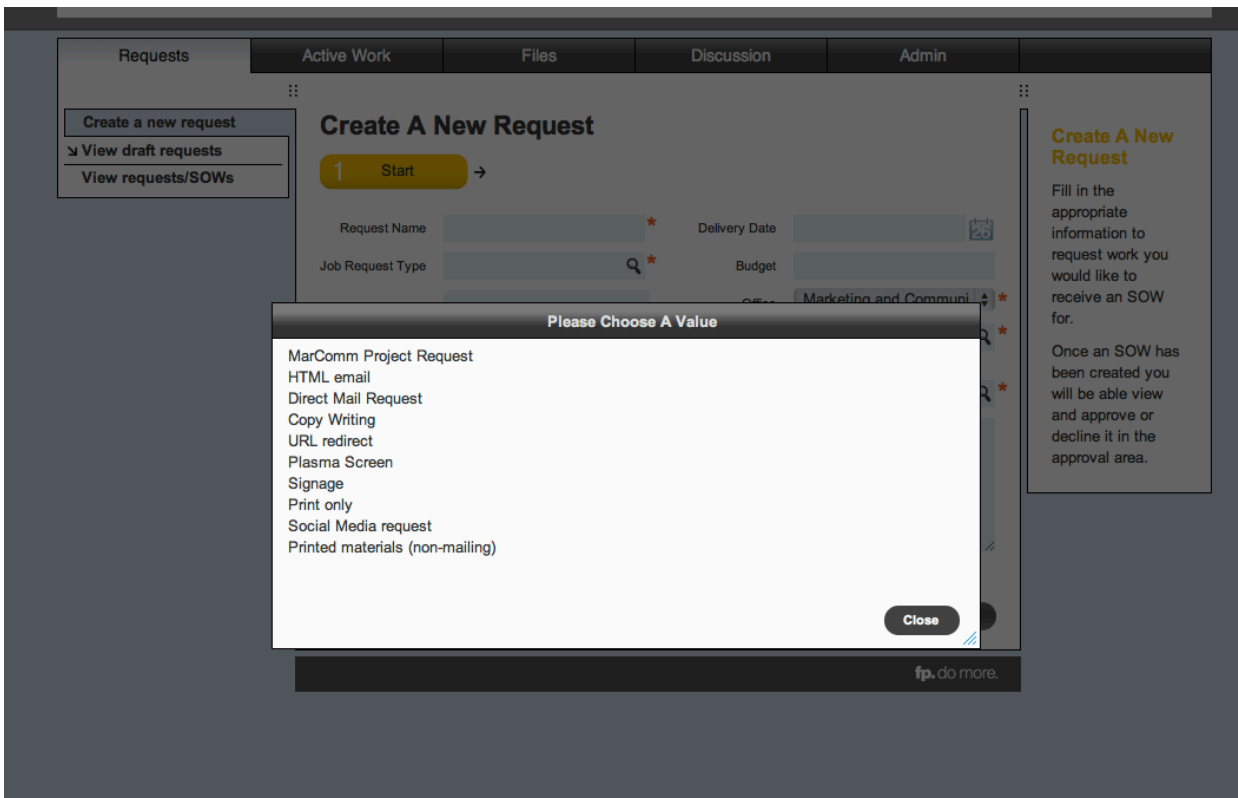
The screenshot shows the 'Create A New Request' form on the EVMS website. The form is titled 'Create A New Request' and has a '1 Start' button. The form fields are:

- Request Name (required field, marked with a red asterisk)
- Job Request Type (required field, marked with a red asterisk)
- Company Name (DEVELOPMENT, required field, marked with a red asterisk)
- Description
- Delivery Date (calendar icon)
- Budget
- Office (Marketing and Communi, required field, marked with a red asterisk)
- Account Executive (Nancy Chapman, required field, marked with a red asterisk)
- Key Contact (\*All Development, required field, marked with a red asterisk)

At the bottom of the form, there are two buttons: 'Save As Draft' and 'Save & Next'. A sidebar on the right contains a 'Create A New Request' section with instructions: 'Fill in the appropriate information to request work you would like to receive an SOW for. Once an SOW has been created you will be able view and approve or decline it in the approval area.'

Step 3: Select job request type

Selecting the job request type will customize the questions that you will be asked on the following pages. The questions will be tailored to the type of job you are requesting. Clicking on the magnifying glass will show you all of the job type options. If you do not see a value that applies to your job, select “MarComm Project Request” to get the most comprehensive form available.

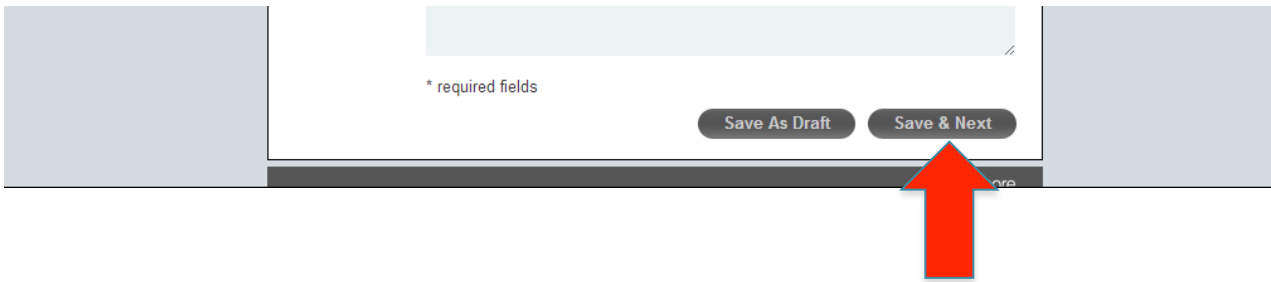


Step 4: Selecting your account executive.

This field will automatically default to the account executive assigned to your department/program.

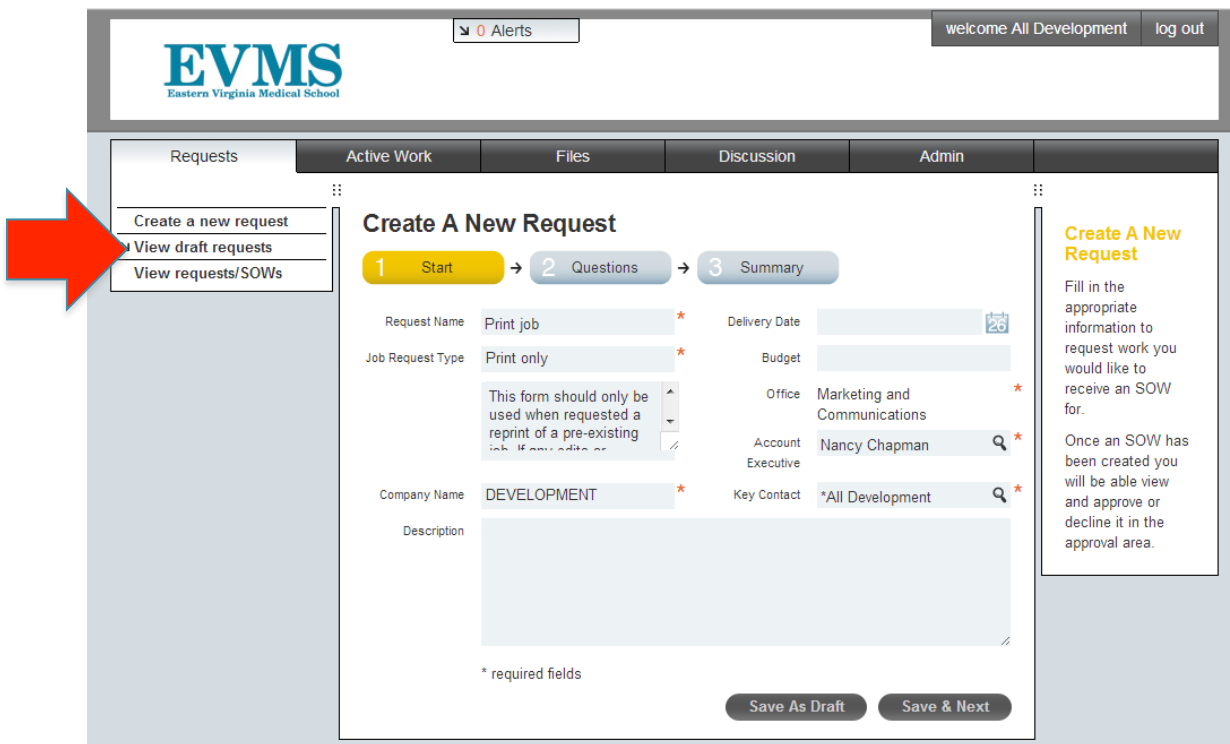
\*Some accounts are shared between multiple account executives. If this is the case, please just select Kelley Jackson and I will reassign it to the appropriate person.

Step 5: Select “Save and next” to move on to the job specific questions.



**Step 6:** Answer the job request questions as completely as possible. Anything marked with a red asterisk is required.

**Step 7:** At any point you can “save as draft” and exit the form. Your request will not be submitted to Mar/Comm but will be available for you to complete at a later date. To return to a draft request, select “view draft requests” under the Requests page.



Select the name of the request in order to view the details and continue editing.

EVMS  
Eastern Virginia Medical School

Alerts | welcome All Development | log out

Requests | Active Work | Files | Discussion | Admin

Create a new request  
View draft requests  
Print on job  
Video  
Print  
Print  
View requests/SOWs

### Open Requests

Status	Name	Date	Actions
Not Submitted	Print on job		Submit To Nancy Chapman   Delete
Not Submitted	Video		Submit To Nancy Chapman   Delete
Not Submitted	Print		Submit To Nancy Chapman   Delete
Not Submitted	Print		Submit To Nancy Chapman   Delete

fp. do more.

**Step 8:** Once you have completed answering all of the necessary questions, select “Save and Next.” You will have the opportunity to review your form before submitting to Mar/Comm.

**Step 9:** If all of the details are filled out correctly, you can then click “Submit Request.”

SOW: [ ] Office: Marketing and Communications

Status: Not Submitted

Description: [ ]

Finished job due date: Dec 20 2013 \*

What is the priority level for this job? C

What do you need printed? [ ]

Please attach print-ready file here. [ ]

Is this for an event? No \*

Event name if applicable: [ ]

Event date if applicable: [ ]

Quantity to be printed? 100

Billing information: [ ]

Save & Previous | Submit Request

fp. do more.

An alert will be sent to the noted account executive and the traffic manager. If they have any questions before an official job is opened, they will let you know. You will be alerted once your request has been turned into a job, at which point it will then show up on your “Active Work” page.

## Job Request form descriptions

**Bio Card:** Use this form when you are requesting a new bio card or an update to an existing bio card

**Copywriting-** Use this form when you need something written that is not associated with a design job. (i.e. speeches, press releases, letters, etc)

**CVENT request-** Most departments will NOT need to use this form. CVENT is a software program that some departments pay to use. Please use this request when requesting banners to be designed for the CVENT website.

**Direct Mail request-** Use this form when requesting a job for which marketing will be helping design, as well as, coordinate mailing services. (ex. Postcards, newsletters, invitations). NOTE: If you want something printed, but plan to handle to mailing yourself, please use the "Printed materials (non-mailing)" request form.

**HTML request-** An HTML request is used when you would like MarComm to create an email for you that includes graphics or needs to have RSVP functionality.

**MarComm Project Request-** This is the most comprehensive form that asks all of the basic questions needed to submit a job to Marketing and Communications. If you are not sure what category your job falls into or if your job does not match any of the other options, use this form.

**Plasma Screen-** Please use this form when requesting the creation and posting of new plasma screens to be viewed on campus. NOTE: PowerPoint templates are available for you to download so that you can create the plasma screen yourself before submitting a request. There is a field to upload your completed PowerPoint file within this form.

**Print only-** This form should only be used when requesting a reprint of a pre-existing job that we produced in the past. If any edits or revisions need to be made before printing, please use the "Printed materials (non-mailing)" form.

**Printed materials (non mailing)-** Please use this form for printed collateral items (i.e. postcards, brochures, booklets, etc) that will not require any mail service coordination from Marketing and Communications.

**Short URL/ Webpage redirect-** Use this form when you need help from Web Technologies to redirect a webpage or create a shortened web address for a specific page.

**Signage-** Use this form when requesting any type of signage such as posters, displays, or banners.

**Social Media request-** If you have a suggestion of something that you think should be posted to one of our social media outlets, you can submit that here. NOTE: Account executives reserve the right review all requests and determine whether or not social media is the appropriate venue for your communication.