The University of Oklahoma Foundation

New Reviewer Request

Electronic Submission Instructions
June 29, 2018

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Login

To begin the process of requesting a new fund Reviewer in the Foundation system, access the Foundation website URL: http://www.oufoundation.org/Reviewer.
Creating a new Reviewer and adding to a Fund

Select + Create New Reviewer.

Step 1: Select Funds
Select All  Deselect All
Select funds to manage...

Step 2: Add Reviewers to Funds
To add a new reviewer to the funds selected above, search for the reviewer by typing their name (i.e. FirstName LastName) in the box below. If you cannot find a reviewer, you can create a new one by clicking the Create New Reviewer button above.

NOTE: At least one fund must be selected before you can begin searching for reviewers.

Enter a reviewer’s name to add the selected fund(s)...
Enter the required information.

NOTE: Use this format when entering the name: FIRST NAME LAST NAME no punctuation.

Select Continue.
On the next screen, review the information and click the “I have verified that I am not requesting the creation of a duplicate reviewer” box.
Click the Continue Button

Please examine the existing reviewer and/or requests below to be sure that you are not requesting a duplicate reviewer or dup box at the bottom of the grid(s) to acknowledge you are not creating a duplicate.

<table>
<thead>
<tr>
<th>Reviewer Name</th>
<th>Reviewer Email</th>
<th>Campus Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deborah Marsh</td>
<td><a href="mailto:dmarsh@ou.edu">dmarsh@ou.edu</a></td>
<td>University of Oklahoma Foundation, 1 Timberdell Rd.</td>
</tr>
</tbody>
</table>

I have verified that I am not requesting the creation of a duplicate reviewer;
A User Id must be created at this stage, 8-character limit, case sensitive. It is recommended that the alias from the Global Address Book be used. You can find this by accessing the Address Book in the Outlook email system, searching for the person and double clicking on his/her name. The popup dialogue box has a place where you can see the alias.

Passwords must have a minimum of 8 characters and maximum of 12 characters. Password must also meet 3 of 4 requirements: 1.) at least 1 upper case character, 2.) at least 1 lower case character, 3.) at least 1 numerical character, 4.) at least 1 special character.

Enter a Username and Password.

Press Continue. A confirmation popup box will appear.
Next, choose the fund or funds for review. Multiple funds may be selected by clicking on each or using Select All.

To add the new reviewer to the fund(s) you selected, search for the reviewer by typing their name in the search box. Begin typing a sponsor’s name, the menu will auto-populate the full name. You must click with your mouse on the name to select the correct sponsor. Typing in the name and tabbing to the next field will not select the correct person.
Once you’ve selected the user, an updated list of Reviewers for the fund(s) will appear in the grid. Funds are listed in numerical order and existing reviewer information is also shown.
Adding an already existing Reviewer to a Fund

If a user already exists in the Foundation system, begin typing the fund number or click your mouse cursor in the “Select funds to manage...” box below.
Next, choose the fund or funds for review. Multiple funds may be selected by clicking on each or using Select All.

To add a new reviewer to the fund(s) you selected, search for the reviewer by typing their name in the search box. Begin typing a sponsor’s name, the menu will auto-populate the full name. You must click with your mouse on the name to select the correct sponsor. Typing in the name and tabbing to the next field will not select the correct person.
Once you’ve selected the user, an updated list of Reviewers for the fund(s) will appear in the grid. Funds are listed in numerical and existing reviewer information is also shown.