The University of Oklahoma Foundation

**New Sponsor Request**

**Sponsor Change Request**

**Electronic Submission Instructions**

**October 12, 2018**

Foundation Contact: Deborah Marsh  
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Login

To begin the process of requesting a new user or sponsor change in the Foundation system, access the Foundation website URL: http://www.oufoundation.org/Sponsor.

Choose the correct Domain name from the dropdown menu (Norman Campus domain is SOONER). Log in using your credentials.
Creating a new Sponsor

A new Sponsor can be created with or without any associated funds. Select + Create New Sponsor.

Enter in the required information.
**NOTE:** Use this format when entering the name: FIRST NAME LAST NAME no punctuation.

Select Continue.
You may save your work at any time by clicking the Save button at the top of the screen. Clicking the Home button will exit the current form and direct you to your Dashboard which will show your list of requests.

Enter the Preparer phone number.

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.
Select a reason for the request.

Enter any additional comments in the Comments area.

At this point, save the form.

To add the new sponsor without assigning to any funds, select the Request Approval button.

If there are funds to add to the sponsor, scroll down to the Requested Actions portion of the form.
Adding New Sponsor to Fund(s)

Select the + Add Sponsor To Fund(s)

From the drop-down menus, choose the correct College and Department.
All funds associated with the Departments and College will appear in the grid. Check the box (or select the top most box for ‘select all’) for the appropriate fund to add sponsor to and choose the Authorization Level.

Once all the Funds have been selected, choose the Accept button on the bottom right of the screen. A list of the selected Funds will now be viewable.
Once all funds are selected, appropriate **existing** fund sponsors **must** be selected to approve this addition/change.

**Choose + Select Approvers**

The system defaults to the first Primary Sponsor in alphabetical order by last name, however, any Primary Sponsor of a fund may be selected in the Sponsor dropdown menu.

Press Accept.
Please note: If multiple funds, departments etc. are involved, a Primary Sponsor from each fund must approve the action. The system will automatically go through the funds and present the approving Sponsor for you to Accept (Sponsors with multiple funds contained in this action will only be presented once).

Once the approving sponsor is chosen, save the form click the Req. Sig. button. After the form is saved, the Request Signatures option becomes available within the request and at the top of the form.

An automated email will be generated to the sponsor(s) requesting the approval of this action.
You can monitor the progress of your request(s) by accessing the Home button and viewing your dashboard. You will also receive a notification email when each approver signs.

When all signatures have been received, the status of the request will then change to “Ready for Approval”. This status means the form has processed on through to the Foundation and is awaiting approval.

Once approved by the Foundation the status will change to Approved.
Replacing Existing Sponsor with New Sponsor:

Select the Replace a Sponsor button:

This is a list of the requested changes to the sponsor.

Add Sponsor to Fund(s)  Replace a Sponsor

Drag a column header and drop it here to group by that column

Search for the Sponsor. Begin typing the first name, the system will provide a list of choices. The name must be selected by clicking on it with your mouse.

Accept the Sponsor.
All the funds that the Sponsor you are asking to be replaced will be listed. Authorization Level, Department, College are also shown. If you only need to replace the sponsor on some of the funds, remove the unchanging funds by clicking on x Remove.

Choose + Select Approvers

The system defaults to the first Primary Sponsor in alphabetical order by last name, however, any Primary Sponsor of this fund may be selected in the Select Approvers dropdown menu.

Please note: If multiple funds, departments etc. are involved, a Primary Sponsor from each fund must approve the action. The system will automatically go through the funds and present the approving Sponsor for you to Accept.
Once the approving sponsor is chosen, save the form click the Req. Sig. button. After the form is saved, the Request Signatures option becomes available within the request and at the top of the form.

An automated email will be generated to the sponsor(s) requesting the approval of this action. The action will not be processed into the Foundation systems until all signatures are received.

Once all the signatures are received, the form will automatically route on to the Foundation for processing.

You can monitor the progress of your request(s) by accessing the Home button and viewing your dashboard. You will also receive a notification email when each approver signs.
When all signatures have been received, the status of the request will then change to “Ready for Approval”. This status means the form has processed on through to the Foundation and is awaiting approval.

Once approved by the Foundation the status will change to Approved.
Sponsor Changes (Sponsor exists in Foundation system)

Adding a Sponsor to fund(s)

Once logged in, select Modify Sponsor

Search for the Sponsor. Begin typing the first name, the system will provide a list of choices. The name must be selected by clicking on it with your mouse.

Select Continue

On the next screen, enter the preparer’s phone number and then scroll down until header titled Requested Action.
Select + Add Sponsor to Funds

Select College and Department to which the funds belong from the drop-down menu. A list of funds will be generated. Select the appropriate fund and the correct Authorization Level, then select Accept.
Choose + Select Approvers

The system defaults to the first Primary Sponsor in alphabetical order by last name, however, any Primary Sponsor of this fund may be selected in the Select Approvers dropdown menu. **Please note:** If multiple funds, departments etc., are involved, a Primary Sponsor from each fund must approve the action. The system will automatically go through the funds and present the approving Sponsor for you to Accept.

Once the approving sponsor(s) is/are chosen, save the form and then click the Req. Sig. button. In the case of multiple signatures, the Request Signature option in the red title bar will request all at one time. This button becomes available after the form is saved.

An automated email will be generated to each sponsor requesting the approval of this action. The action will not be processed into the Foundation systems until all signatures are received.

Once all the signatures are received, the form will automatically route on to the Foundation for processing.
You can monitor the progress of your request by accessing the Home button and viewing your dashboard. You will also receive a notification email when each approver signs.

When all signatures have been received, the status of the request will then change to “Ready for Approval”. This status means the form has processed on through to the Foundation and is awaiting approval.

Once approved by the Foundation the status will change to Approved.
Removing a Sponsor from fund(s)

To delete a Sponsor without replacing with another Sponsor (Fund by Fund or a ‘mass’ delete)

Select Modify Sponsor

Search for the Sponsor. Begin typing the first name, the system will provide a list of choices. The name must be selected by clicking on it with your mouse.

Select Continue
On the next screen, enter the preparer’s phone number and then scroll down until header titled Requested Action.

Select either the - Remove Sponsor from Fund(s) or Remove Sponsor from All Funds

Select Yes in the dialogue box (Note: once you select Yes, a list of all the funds the Sponsor is on will appear.)
Choose + Select Approvers

The system defaults to the first Primary Sponsor in alphabetical order by last name, however, any Primary Sponsor of this fund may be selected in the Select Approvers dropdown menu. Please note: If multiple funds, departments etc., are involved, a Primary Sponsor from each fund must approve the action. The system will automatically go through the funds and present the approving Sponsor for you to Accept.
Once the approving sponsor(s) is/are chosen, click the Req. Sig. button. In the case of multiple signatures, the Request Signature option in the red title bar will request all at one time. This button becomes available after the form is saved.

An automated email will be generated to each sponsor requesting the approval of this action. The action will not be processed into the Foundation systems until all signatures are received.

Once all the signatures are received, the form will automatically route on to the Foundation for processing.

You can monitor the progress of your request by accessing the Home button and viewing your dashboard. You will also receive a notification email when each approver signs.

When all signatures have been received, the status of the request will then change to “Ready for Approval”. This status means the form has processed on through to the Foundation and is awaiting approval.
Once approved by the Foundation the status will change to Approved.

<table>
<thead>
<tr>
<th>Entered By</th>
<th>Date/Time Entered</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deborah Marsh</td>
<td>3/5/2018 12:52 PM</td>
<td>Approved</td>
<td>Request approved by the Foundation</td>
</tr>
<tr>
<td>J. Scott Greene</td>
<td>3/5/2018 12:03 PM</td>
<td>Ready for Approval</td>
<td>Request submitted for approval</td>
</tr>
<tr>
<td>Deborah Marsh</td>
<td>3/5/2018 10:37 AM</td>
<td>Signatures Requested</td>
<td>Signatures requested</td>
</tr>
<tr>
<td>Deborah Marsh</td>
<td>3/5/2018 10:36 AM</td>
<td>Pending</td>
<td>New Request</td>
</tr>
</tbody>
</table>
Replacing Sponsor(s) (mass replace):

This option (sometimes referred to as a ‘mass replace’) would be chosen when a sponsor leaves and is replaced by someone who is already a user in the Foundation System.

Select the Modify a Sponsor button:

Search for the Sponsor that will be replacing another Sponsor. Begin typing the first name, the system will provide a list of choices. The name must be selected by clicking on it with your mouse. You may need to scroll down the list.

*If the Sponsor is not listed in the search window, a New Sponsor Request will need to be completed. Refer to page 4 of this document.*

Select Continue
Enter the Preparers Phone Number.

Scroll down the page and you’ll see the Sponsor information.

Enter any Comments.

Select Replace a Sponsor
Scroll down to Requested Actions and choose Replace a Sponsor
Begin typing in the name of the Sponsor to be replaced and choose with mouse from dropdown menu

Select Accept

All the funds for the Sponsor you are asking to be replaced will be listed.

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<table>
<thead>
<tr>
<th>Action</th>
<th>Fund</th>
<th>Title</th>
<th>Auth. Level</th>
<th>College</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>X Remove</td>
<td>Replace 0041487</td>
<td>American Airlines Professorship of Meteorology</td>
<td>C1</td>
<td>Atmospheric &amp; Geographic Sciences</td>
<td>Meteorology</td>
</tr>
<tr>
<td>X Remove</td>
<td>Replace 0030184</td>
<td>Associates Atmospheric and Geographic Sciences</td>
<td>P1</td>
<td>Atmospheric &amp; Geographic Sciences</td>
<td>Atmospheric Sciences</td>
</tr>
<tr>
<td>X Remove</td>
<td>Replace 0030999</td>
<td>Atmospheric and Geographic Sciences Development</td>
<td>P1</td>
<td>Atmospheric &amp; Geographic Sciences</td>
<td>Atmospheric Sciences</td>
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<tr>
<td>X Remove</td>
<td>Replace 0033264</td>
<td>Atmospheric Radar Research Center Development</td>
<td>C1</td>
<td>Atmospheric &amp; Geographic Sciences</td>
<td>Atmospheric Research Center</td>
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<tr>
<td>X Remove</td>
<td>Replace 0042561</td>
<td>Bheru and Lila Suhkwal Endowed Fellowship</td>
<td>C1</td>
<td>Atmospheric &amp; Geographic Sciences</td>
<td>Geography</td>
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<tr>
<td>X Remove</td>
<td>Replace 0031718</td>
<td>CAPS Development</td>
<td>C1</td>
<td>Atmospheric &amp; Geographic Sciences</td>
<td>Ctr Analysis &amp; Development</td>
</tr>
</tbody>
</table>
Chose + Select Approvers

The system defaults to the first Primary Sponsor in alphabetical order by last name, however, any Primary Sponsor of this fund may be selected in the Select Approvers dropdown menu.

Please note: If multiple funds, departments etc. are involved, a Primary Sponsor from each fund must approve the action. The system will automatically go through the funds and present the approving Sponsor for you to Accept.

Once the approving sponsor(s) is/are chosen, click the Req. Sig. button. In the case of multiple signatures, the Request Signature option in the red title bar will request all at one time. This button becomes available after the form is saved.

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When all signatures have been received, the status of the request will then change to “Ready for Approval”. This status means the form has processed on through to the Foundation and is awaiting approval.

Once approved by the Foundation the status will change to Approved.
Approving a Request

Approver (Sponsor) login

To begin the process of approving a new user or sponsor change in the Foundation system, access the Foundation website URL: http://www.oufoundation.org/Sponsor.

Choose the Sponsor login area and log in using your OU Foundation credentials (the credentials you normally use to approve payment requests/scholarship disbursements. This is not the same as what you use to log in to your OU email account).
If not already highlighted, select the Show Only Pending Signature button. Click the View button.

On the next screen, select the Sign button.
It will be necessary to input your OU Foundation issued digital signature into the popup window. Once the Sign button is selected, the form will move on to the Foundation for final approval.