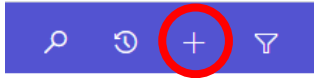


Adding a Task in Advance (List Request)

1. Click the plus sign in the blue bar on the top of the page.



2. Fill out the form that pops up. Reference the sections below for assistance.

Subject: The name of the list you are requesting

Regarding: Type *Advancement*- and select the appropriate department from the drop down.

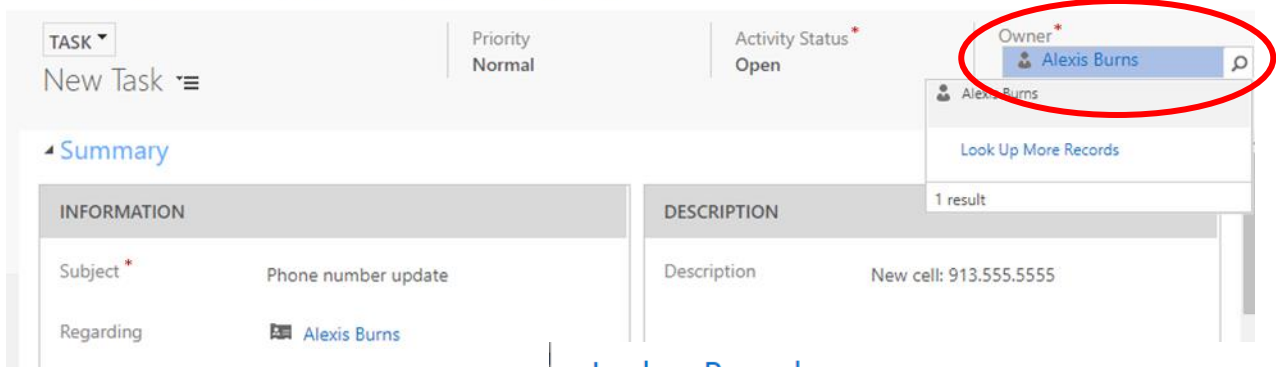
Purpose: Select Data Requests from the drop down. For a detailed list of all options with definitions, refer to the purpose glossary.

Due date: 2 weeks from the date the request is submitted.

Description: Include the criteria for the list, columns needed, and any additional details or context for the request.

3. Change the owner of the task to the Data Specialist by clicking the magnifying glass in the top right, then selecting look up more records.

? HELP SAVE ✓ MARK COMPLETE SAVE & CLOSE SAVE & NEW

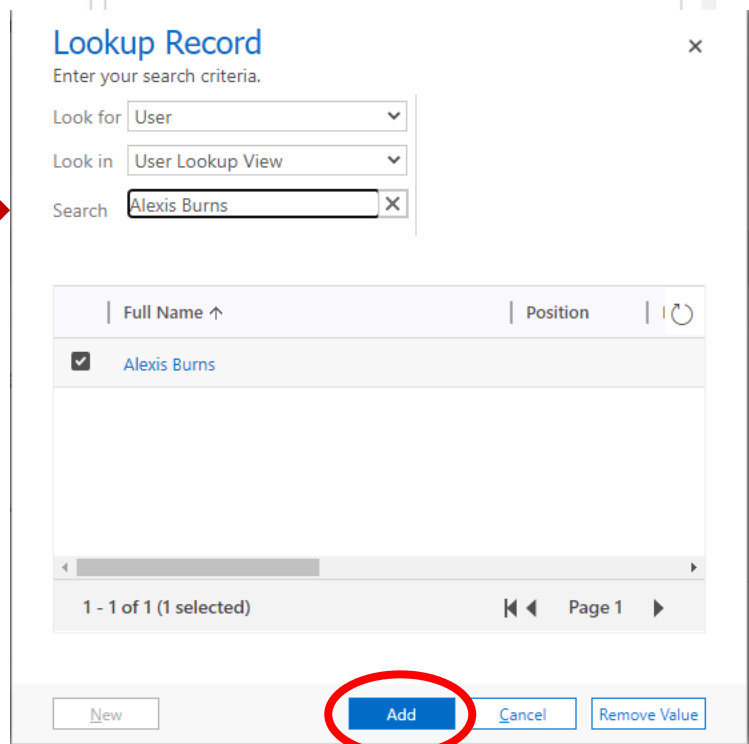


Summary

INFORMATION	DESCRIPTION
Subject * Phone number update	Description New cell: 913.555.5555
Regarding Alexis Burns	

4. Search for the Data Specialist's name, double click on it, then press add.

5. Save and close the task.



Lookup Record

Enter your search criteria.

Look for: User

Look in: User Lookup View

Search: Alexis Burns

Full Name ↑	Position
☑ Alexis Burns	

1 - 1 of 1 (1 selected) Page 1

New Add Cancel Remove Value