Ovrture system usage

Policy Type: Local
Responsible Office: Office of Development and Alumni Relations
Initial Policy Approved: New policy

Policy statement and purpose

Ovrture is a cloud-based digital platform that allows Development and Alumni Relations team members to quickly curate and share individualized microsites with key prospects and donors via a unique URL.

All sites and reports developed in the Ovrture system must be approved by a brand administrator. All sites that include a funding proposal must be approved, before delivery, by the AVP of Development, Monroe Park Campus or AVP of Development, MCV Campus. The staff person sending a site to a prospect must add an interaction to the constituent’s record in the DAR system of record, RADAR. Prospect managers are alerted by RADAR when an interaction is logged with one of their prospects.

Sites created in Ovrture for dissemination to prospects must follow the flow of the prospect cultivation process and be sent in concert with a one-to-one introduction, a scheduled personal visit, a SPV follow-up, as a means to send a proposal or as stewardship. Event invitations, annual giving solicitations, etc., must not be deployed via Ovrture but instead sent using existing DAR systems as outlined in the DAR-related communications policy.

Strategic Marketing and Engagement establishes all permissions in the system. System content is developed by DAR Communications in partnership with campus partners.

The purpose of this policy is to maintain the value and quality of communications from VCU and its individual units.

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Who should know this policy

All university employees engaged in activities related to development and alumni relations are responsible for knowing this policy and familiarizing themselves with its contents and provisions.

Definitions

Assets
Files and resources, such as photos, videos and documents, that can be used to customize and personalize sites and reports. The Assets Module allows a user to upload, organize and preview these files.

Brand administrator
Has the same abilities as a user, with the following additional abilities (for the sub-brand they manage): review and approve sites that do not have a proposal component; create/edit content panels; and upload assets to the brand cloud. Each campus partner using Ovrture determines their brand administrator, which is often a lead development officer or a director of communications. This decision must be promptly sent to Strategic Marketing and Engagement for permissioning in Ovrture.

Brand cloud
Contains assets managed by the system administrator or brand administrator for that brand (i.e. College of Humanities and Sciences, School of Medicine).

Portfolio
A user’s “home” screen within Ovrture. The table on this page reflects the set of prospects managed by the user. When a constituent record is imported or created, it must be linked to a user account (and therefore reside in that user’s portfolio). This ensures that sites and reports, regardless of who created or edited them, present the owner as the main point of contact. Users can create sites for prospects of whom they are not the primary prospect manager as long as they are members of the prospect team. These users must communicate with the primary prospect manager of said prospect before doing so.

Prospect
A donor, or prospective donor, who has been assigned to a development officer for discovery, cultivation, solicitation and stewardship. These prospects show as records under the Portfolio area.

Record
A prospect assigned to a user in Ovrture. Each record can have one site and multiple endowment reports (for different fiscal years). A prospect or donor must have a record in Ovrture before a site or report can be created for that individual. Prospects are updated monthly in Ovrture from RADAR. A prospect can be added manually in Ovrture by a user by using the RADAR ID, which ensures the records match during the monthly import.
Endowment report
A microsite that recaps a donor’s endowment performance for a given fiscal year.

Scheduled personal visit
A planned, face-to-face conversation with a prospect or donor that is meaningful and advances the prospect/donor relationship with VCU.

Site
A personalized microsite to share with a prospect or donor.

System administrator
Controls permissions so users have access to only their specific school/college/unit sub-brand. The system admin can review, edit and approve sites and reports; create/edit/view user accounts/user settings; control access to sub-brands; assign brand admin responsibilities to a user; create/edit content panels; control access to assets and content panels; create/edit/remove a system broadcast alert; upload assets to any cloud; and delete records permanently.

System cloud
Contains assets that are managed by the system administrator and are generally available to all users.

User
A person who can log into the system and create sites and/or reports. Permissions vary but generally a user can update their profile information; upload assets to their user cloud; create/import records; build and edit sites and/or reports for their records; build and edit sites and/or reports for other users (if designated by system admin); submit sites or reports for approval; share sites or reports (via a custom URL); duplicate sites; delete sites; and delete records.

User cloud
Contains assets uploaded by users for use within their sites and is organized according to their preference.

Contacts
The Office of Development and Alumni Relations officially interprets this policy. The Office of Development and Alumni Relations is responsible for obtaining approval for any revision as required by the policy Creating and Maintaining Policies and Procedures through the appropriate governance structures. Please direct policy questions to the AVP or senior project manager for Strategic Marketing and Engagement.

Policy specifics and procedures

1. Adding prospects
   - Stewardship, discovery and primary prospect manager prospects assigned to development officers are added to Ovrture monthly by DAR Communications. Prospects are updated monthly in Ovrture from RADAR. A prospect can be added manually in Ovrture by a user by using the RADAR ID, which ensures the records match during the monthly import. Prospects for new development officers are added to Ovrture during the monthly refresh, once a portfolio has been assigned in RADAR.
2. **Building a microsite**
   - Each microsite can contain a maximum of eight content panels. (A series of horizontally scrolling slides counts as one content panel.)
   - A user builds a microsite from existing content panels and other provided templates to customize the site for their prospect. To build a site, follow instructions [here](#).
   - Save and exit.
   - Content in a microsite should follow standard HIPAA and FERPA restrictions.

3. **Microsite approval**
   - Return to your list of sites.
   - Select “Submit” to initiate approval.
   - The site moves to the review queue, and the system and brand admins are notified.
   - If the site includes a proposal, the user must also notify by email the executive assistant to the AVPs of Development.
   - If the site does not include a proposal, the brand admin for that campus partner can approve the site.
   - Approval by the appropriate admin makes the URL active and ready to send to a donor.

4. **Sending sites to prospects**
   - Sites should be sent to prospects via an email from a VCU staff member.
   - To attain the URL for a site, a user should click “Copy URL” in the “Actions” dropdown for each site. URLs for site are only active after the site has been approved.
   - Users can download an “email bug” from this same dropdown that can be inserted into an email. After doing so, the user can insert the site link on the image that will essentially make the bug a clickable “button.”
   - The five-digit passcode for that site must be included so that the prospect can view it. Passcodes for sites are always 11111. Users must not change passcodes.

5. **Recording the interaction**
   - Any microsite shared with a prospect must be recorded as a distinct interaction on a plan in RADAR. The interaction category of “Ovrture” must be used.
   - This interaction must be entered as a step on a major giving plan within 10 business days.
   - HTML files of the site must be downloaded from the “Data & Analytics” tab of an Ovrture site and recorded in RADAR as instructed above.

6. **Post-visit follow-up**
   - Users can update a prospect's microsite as needed by returning to the site editor, adding new content and saving.

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**Forms**

There are no forms associated with this policy.
1. How are new prospects added?
Prospects are updated in Ovrture monthly from RADAR. If you find that a prospect is not in Ovrture, please contact DAR Communications at supportvcu@vcu.edu.

2. How are joint prospects handled?
Users can create sites for prospects of whom they are not the primary prospect manager. These users must communicate with the primary prospect manager if the wish to change the “Owner ID/Email” under “Edit Record & Settings.” Doing so will move the prospect to the portfolio of the new user within Ovrture. Communication among development officers about clearance to solicit or communicate through Ovrture must be recorded on RADAR plans per Prospect Development policy.

3. Can the names of the system templates be changed?
No, this is hard-coded Ovrture functionality that ensures uniformity across platforms. These templates can be seen under “System templates” under “Content panels.”

4. Can I approve sites created by those in my area before they are sent to prospects?
Yes, each campus partner has an approver of nonproposal sites, called a brand admin.

5. How can I change the “sender” name for a site?
If, for example, a development coordinator makes a site on behalf of a development officer, the coordinator can change the owner of a prospect in the settings so that the sender name is the officer.

6. I started building my site, but now I can’t add any more panels. What now?
Each microsite can contain a maximum of eight content panels. You can add up to six horizontally scrolling slides, which count as one panel. When each of the eight panels and their corresponding six slides are optimized, a site can include 48 panels.
7. After partially creating a content panel, I decided to use a different panel style. I lost all my work. What now?
   To avoid this scenario, carefully review the template here (password: VCU-p9JS^e), which outlines panel layouts and word counts, to help you make the right choice from the outset. Ovrture doesn't allow users to switch panels once creation has begun.

8. Help! I can’t:
   - Manipulate the text box to increase the character count on a panel.
   - Add a text box to a panel.
   - Adjust font size in a panel.

   Each panel has been configured to maintain integrity across all platforms (desktop, mobile, tablet), which limits your ability to manipulate the panels.

9. I added a photo to an image box, and it looks distorted. How do I fix this?
   All photos must be at least 300 dpi. To determine an image’s DPI in Windows, right-click on the file name and select Properties > Details. You’ll see the DPI in the Image section, labeled Horizontal Resolution and Vertical Resolution. On a Mac, you need to open the image in Preview and select Tools > Adjust Size. It’s labeled Resolution.

10. I added an Ovrture site to RADAR as an interaction for historical documentation, but I cannot open it in ImageNow. What do I do?
    HTML files cannot be read in the ImageNow reader. To view the site, download the file out of RADAR.