



DEPARTING SUPPORT STAFF DARS CHECKLIST

Author: Sami Marjanen (Prospect Data Officer)

The purpose of this document is to provide departing support staff with a standard process, prior to their departure, for dealing with the data and system components they leave behind on DARS.

In order to stop the potentially large build-up of **redundant items** in parts of the system it is important for the departing staff member to address the key areas described below. Users should also be aware of which data areas are required to be retained in the system after their departure.

Note: All departing staff members are required to submit a completed **User Access Form** to the DARS Helpdesk

1) Queries

The departing staff member should review all **queries** created or maintained by them in DARS. Use the following methods to locate the queries owned by an individual DARS User:

- a) When logged in, a User is able to tick the **'Only show my queries'** box to list all queries created by them (ensure that all other filtering fields such as **'Name'** are blank)
- b) The User, or any other User, can filter query **'Name'** for their 3-initial code e.g. ABC
- c) Sort the **'Added by user'** column

ACTIONS:

- Transfer any queries used on an ongoing basis to another current staff member (or the designated replacement) by agreement. This is performed by amending the **name** of the query (changing the 3-initial code in the Naming Convention), the **description**, and the **security site** if necessary - the new staff member then assumes responsibility for the item on DARS.
- Delete all remaining queries that are no longer required by the fundraiser's work area.

2) Export Processes

The departing staff member should review all **export** processes created or maintained by them in DARS and carry out the processes described above in the Queries section (deleting exports may require enhanced System rights*).

3) Research Groups

The departing staff member should review all **research groups** created or maintained by them in DARS and carry out the processes described above in the Queries section (deleting research groups may require enhanced System rights*).

4) Prospects Plans and Assigned Fundraiser Roles

The departing staff member should firstly identify whether their name is assigned to any Prospect or Plan roles within DARS. The easiest way to view these assignments is to enter the 'My Fundraiser' page** and view the *Prospects and Plans* tab.

ACTIONS: *considerations for Prospect Plan roles*

- If the departing staff member is assigned to a support fundraising role within a Plan such as **Secondary Manager** or **Secondary Solicitor** this should have an **end date** applied and, if applicable, a replacement fundraiser added to this role
- If the departing staff member is assigned the **Primary Manager** of Plans they should, in consultation with their team and line manager, decide upon a hand-over schedule for these and complete the actions described in the **Departing Fundraiser Checklist**

ACTIONS: *considerations for other Prospect fundraiser roles*

- If the departing staff member is assigned to any leading roles such as **Prospect Manager** or **UO Relationship Lead** they should consult the **Departing Fundraiser Checklist** and, in consultation with their team and line manager, decide upon a hand-over schedule

If more than 250 records require a fundraiser assignment to be 'bulk changed' in the system please contact the DARS Helpdesk

IMPORTANT NOTE: Prospect Plans, Interactions and Documentation should **not be deleted** by a departing fundraiser or staff member. This information is to be **retained** in DARS as a historical record of the prospect relationship.

5) Further Considerations

Staff members working in specialist areas of DARS such as **events** or **revenue** should consult with their line manager and/or the DARS team about any further processes required prior to departure.

6) Personal Constituent Information

Departing staff members should also update their own DARS constituent record in the following areas:

- Personal information (contact details, relationships, constituencies etc) should be reviewed and end dates added where necessary
- Add end dates to any formal group memberships in DARS e.g. all UO Development Office staff should add an end date to their UODO group membership
- *OPTIONAL* Provide new employment and contact details such as address and email if desired e.g. if moving to a new employer or address

* Submit a work request (ITSM) to the DARS Helpdesk along with the completed **User Access Form**

** It is a system requirement that the individual be designated a **Fundraiser** in DARS to appear in these roles and for their 'My Fundraiser' page to be accessible.

The latest version of this document can be downloaded at
<http://www.admin.ox.ac.uk/dars/documents/>