ALETHEIA CRM
Single Source Of Truth

Supplemental Reference Guide for University Users:

EVENT DOCUMENTATION – HOW TO ATTACH FILES IN ALI

Authoring Department: DONOR RELATIONS AND STEWARDSHIP – EVENTS

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Anticipated Audience(s): UNIVERSITY EVENTS MODULE USERS

Version 1.0 – last updated 6/13/2017

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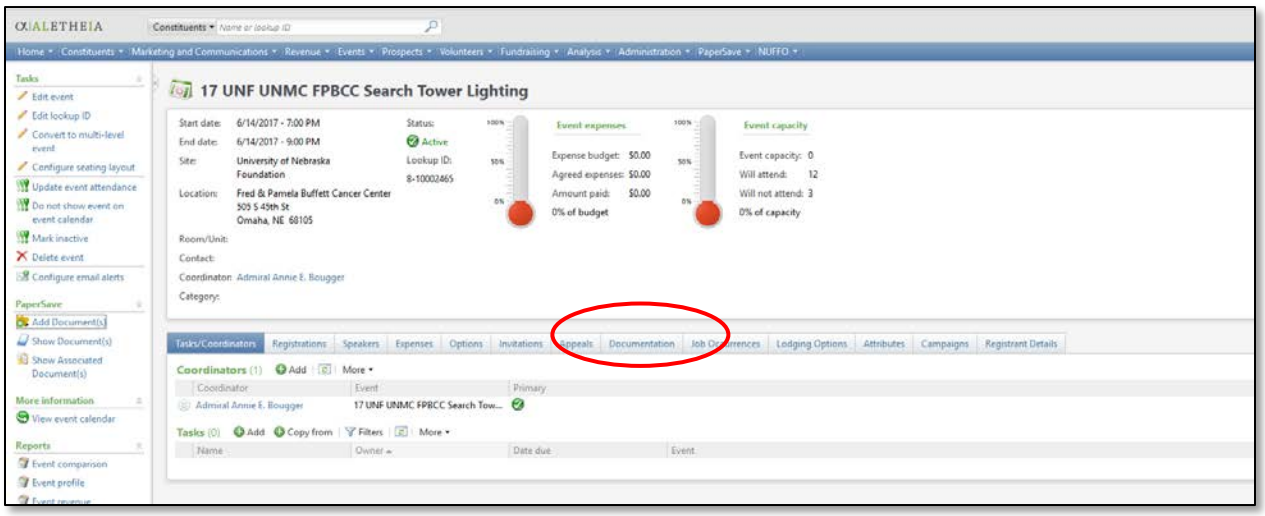
EVENT DOCUMENTATION in *Ali CRM*

The **Documentation** tab within the event section of ***Ali CRM*** allows important documents to be attached to individual event records. In utilizing this event documentation section, multiple users are then able to share and view up-to-date information regarding planning documents, invitations and printed materials, and expenses in the form of receipts, invoices and contracts.

Where to find the Documentation tab on the event

1. To access event documents, locate the event record in ***Ali CRM*.**
2. Upon opening the event you will see a tab titled **Documentation.** This is where you will be able to add event documents or view documents previously saved to the event.



Types of Events-Related Documents to be Saved

1. Event documents to be stored under the **Documentation** tab are as follows and are specific to each available category listed:
    a. Contract:
        i. Venue or facility contract
        ii. Vendor contracts
    b. Event Documentation:
        i. Meeting agendas/minutes
        ii. Venue/facility maps or event layouts
        iii. Historical information/notes if available
        iv. Event notes/details, de-brief notes
        v. Other documents specific to individual event
    c. Expenses:
        i. Event estimates/invoices/bills from vendors
        ii. Copies of check payments as applicable

d. Printed Materials:
    i. Copy of printed save-the-date/invitation or PDF of electronic correspondence invitation
    ii. Programs, booklets or handouts
    iii. Event-specific signage designed for the event
    iv. Other printed materials

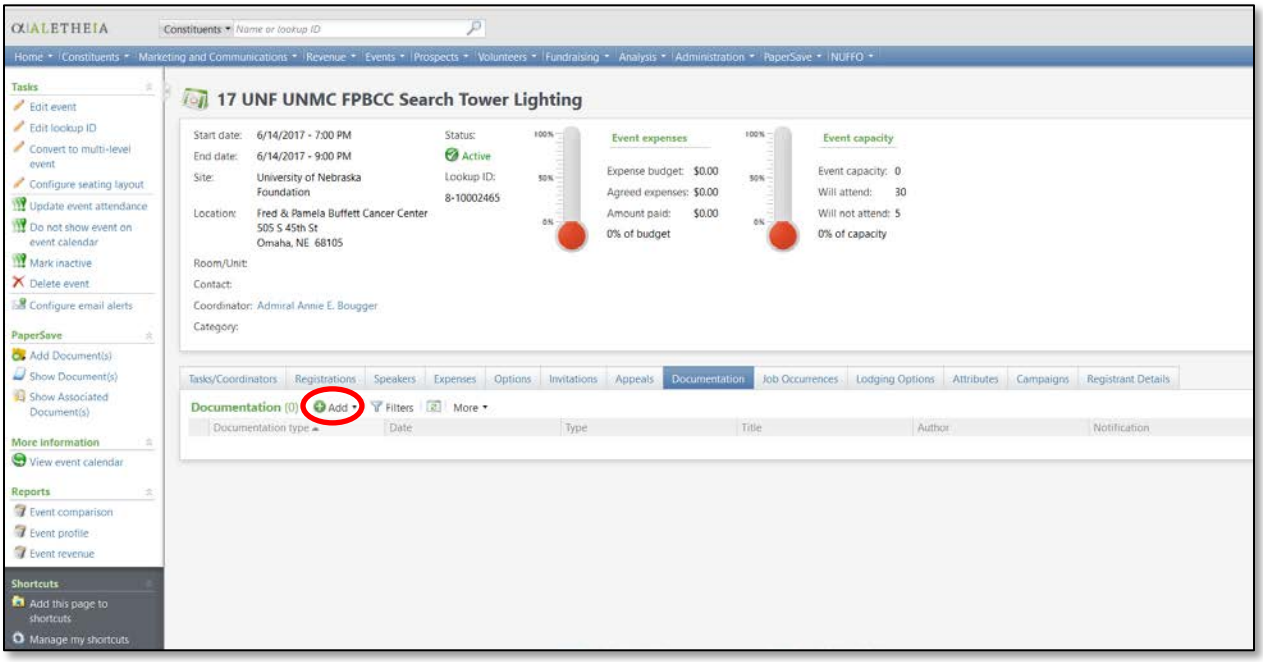
UTILIZING DOCUMENTATION TAB FOR EVENTS

Preparing Documents

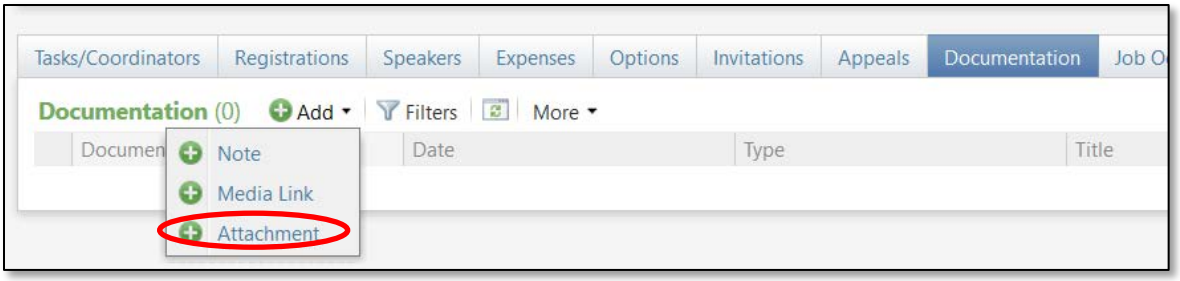
1. Before utilizing the event **Documentation** tab, all documents you would like to add must be scanned and/or saved either on your desktop or within your computer/folder system in a place to which you will be able to browse and add an attachment.
2. Acceptable file types include PDF, Microsoft Word (.doc) and Excel (.xls), and picture/photo files including .jpg, .png or .gif.
    a. Documents can be scanned and saved as a PDF if no original electronic copy is available.

How to Save and Attach Documents

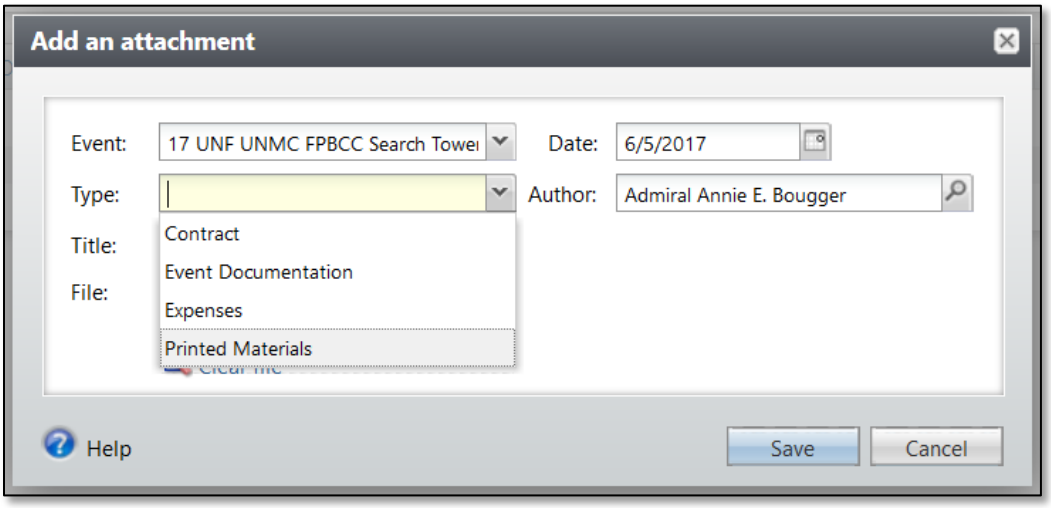
1. After opening the event record, navigate to the **Documentation** tab. Click **Add**.



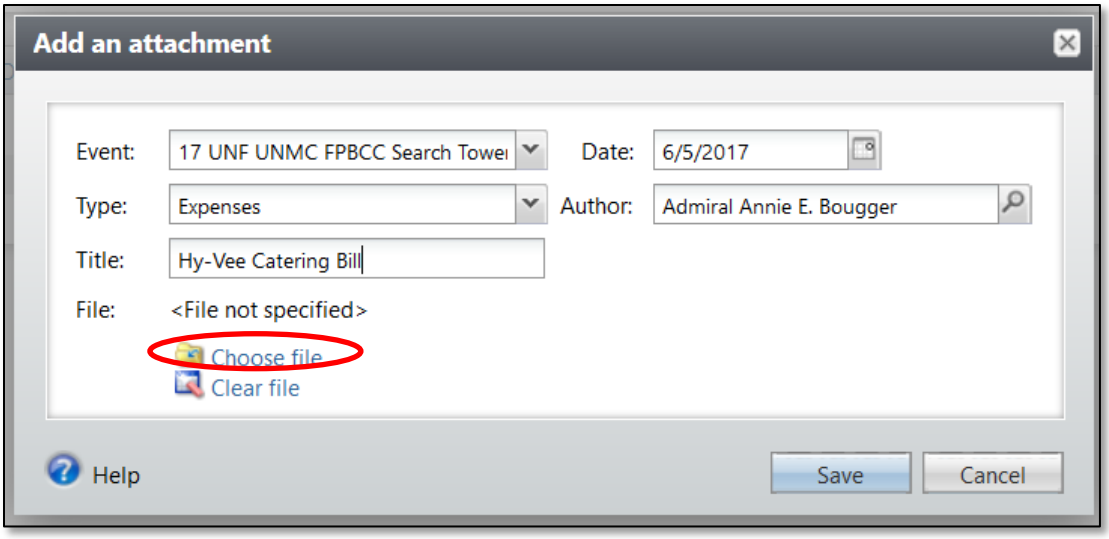
2. A drop-down menu will open that allows you to select a category to save the document as either a **Note**, **Media Link** or **Attachment**. We suggest only utilizing the **Attachment** category to save event documentation.



3. Click on **Attachment**; a new window will open.
4. In the **Add an attachment** window, click the drop-down arrow for **Type** and select from the drop-down menu options: **Contract**, **Event Documentation**, **Expenses** or **Printed Materials**. **Note:** Refer to Types of Events-related documentation to be Saved for additional details.



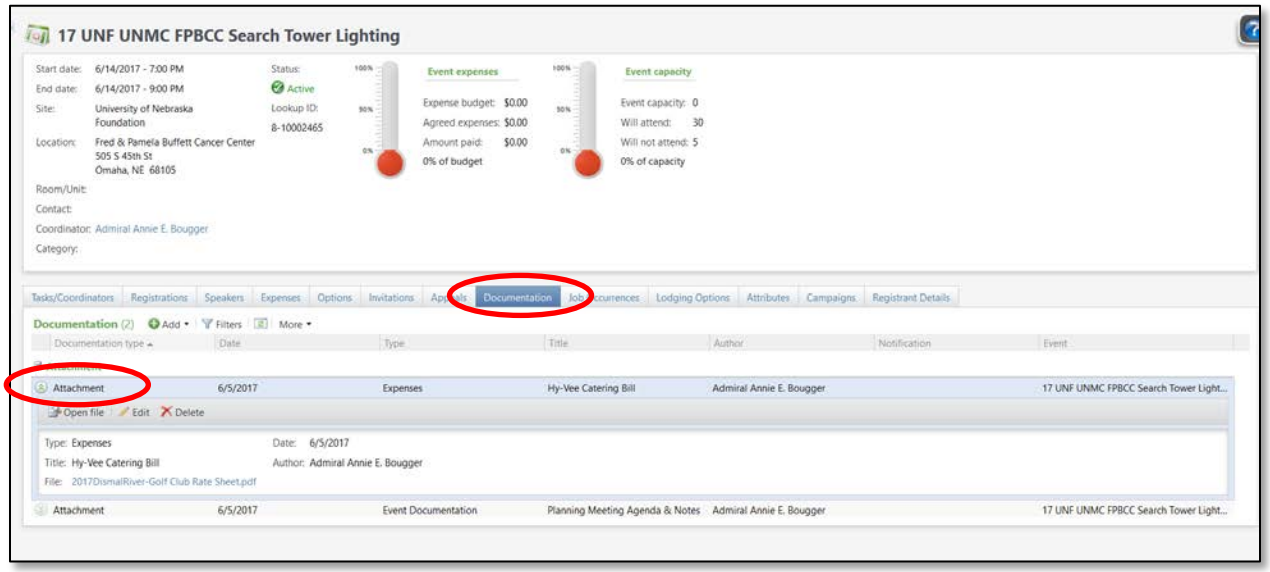
5. In the field labeled **Title**, enter a description of the document. For example, if you have selected the type of **Expenses** and are attaching a bill from the caterer, the text you would type in the title category may resemble: ***Hy-Vee Catering Bill***.
6. After entering a description, select the file to attach by clicking on **Choose file**. Navigate to the location where you have stored the file.



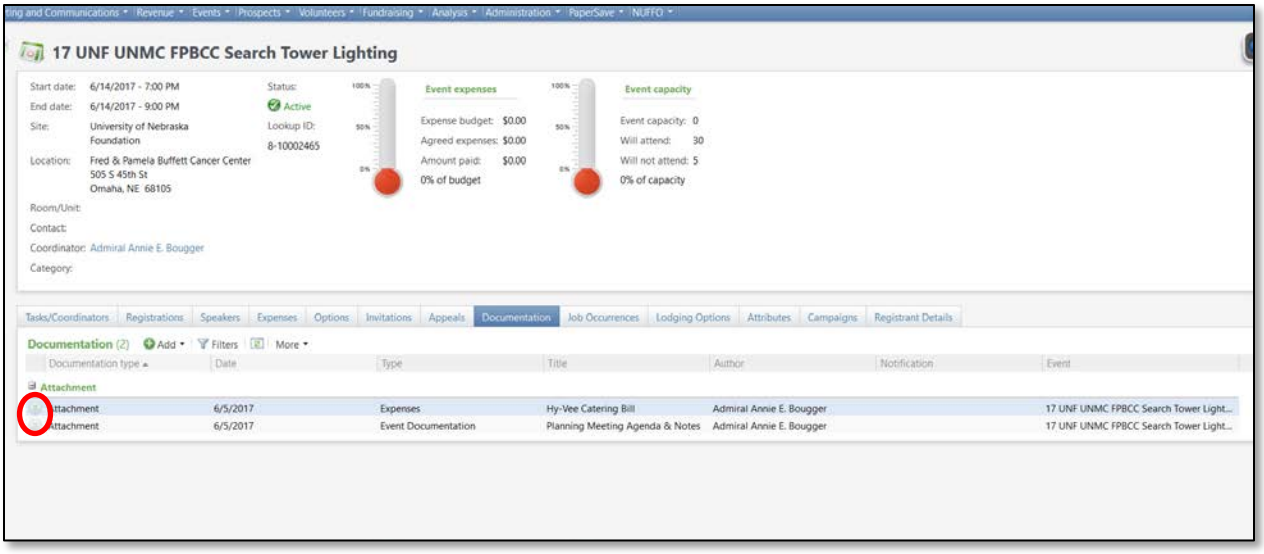
7. If you accidentally select the wrong file you can click on **Clear file** to remove it and re-select the correct file.

How to View Saved Documents

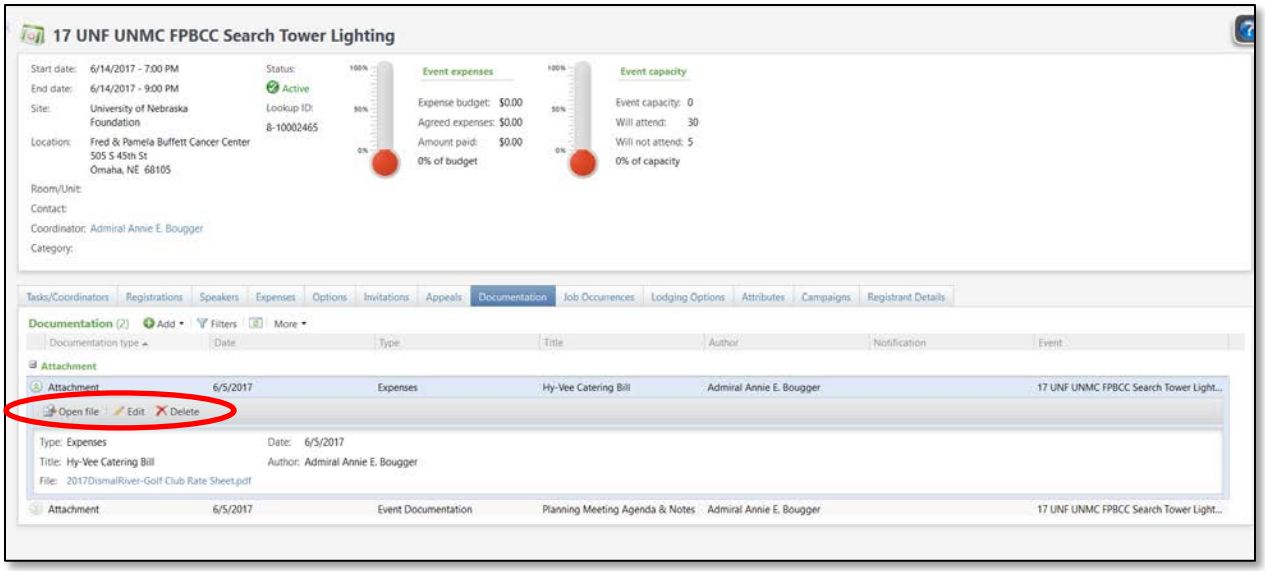
1. To view documents saved in ***Ali,*** navigate to the event record and click on the **Documentation** tab**.**



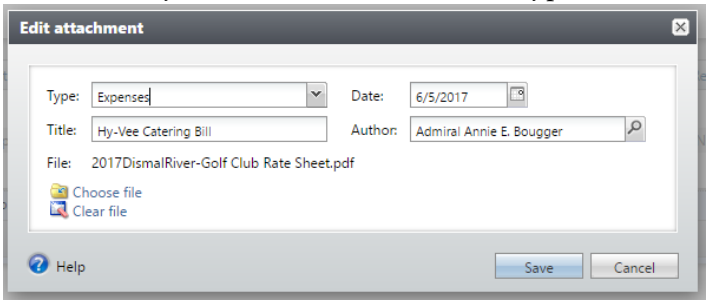
2. Any documents saved to the event will show under **Attachment.**



3. To view any of the attached documents click on the circle with double-down arrows to the left of the attachment. This will expand the area and give you options to **Open file**, **Edit** or **Delete**, depending upon the specific settings of your security user role.



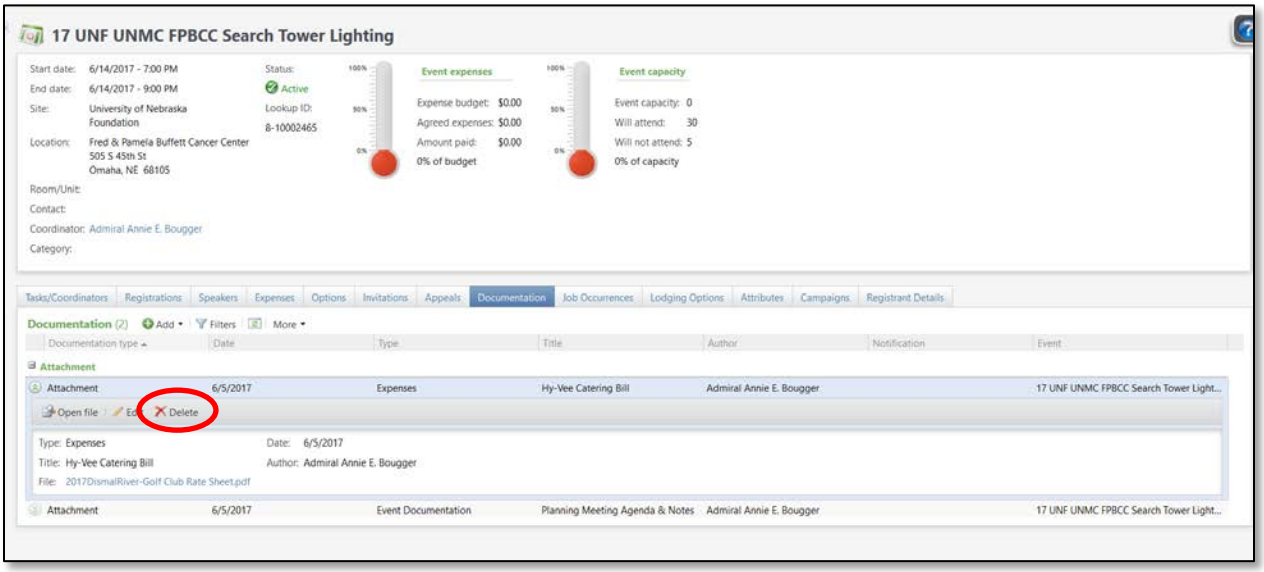
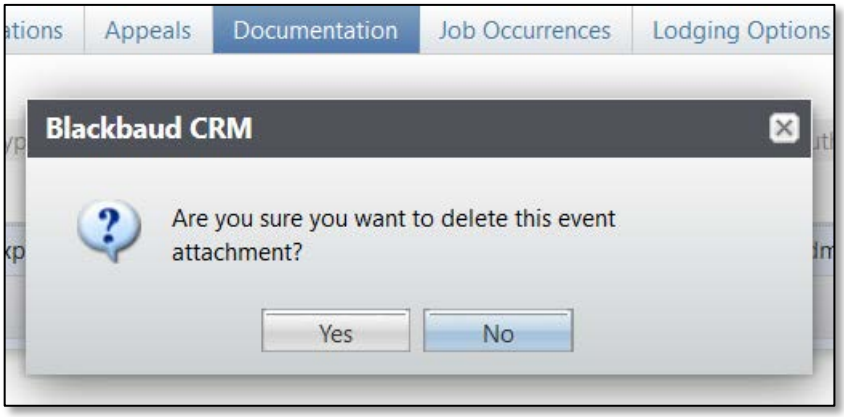
a. **Open file:** Opens the attached file.
b. **Edit:** Allows you to edit the attachment (Type, Title, Date, File, etc.).



c. **Delete:** Allows you to delete the attachment.

How to Delete an Event Document

1. If you mistakenly add a document to the **Documentation** tab and save it, first go through the steps to open the event, then click on the **Documentation** tab.
2. Once you have located the document you wish to delete, click the double-arrow chevron to expand the document description, then click the **Delete** button.



3. You will be prompted to confirm you wish to delete this document; select **Yes** or **No** depending on the desired action.