

Supplemental Reference Guide for:

SMART QUERY: Alumni by Campus, College and Grad year

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Anticipated Audience(s):	All
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Alumni by Campus, College and Grad Year

This smart query allows you to view graduates of a specific campus, college, and/or grad year. It includes deceased alumni. The purpose of this smart query is to allow you to browse specific campus and/or college alumni records or to output basic fields to review.

This query is particularly useful for university partners to identify the constituents they work with that are already in Ali CRM. It can be used to cross reference with other databases you work with. Once missing constituents are identified and added to Ali CRM, campus partners can more fully use Ali CRM for correspondence and other activities with advancement constituents.

Running the Smart Query:

1. Go to the Analysis functional area and select Add a smart query.





2. In the **Smart Query Search** box, enter **Alumni by Campus, College and Grad Year** in the **Name** field and click **Search**. Once the results are populated, click **Select**.

	arch		۵
Name: Record type:	Alumni by Campus, Colle	ge and Grad Y Cle	rch ar
Results (1 reco	rd found)		
Name		Description	Re
Alumni by Cam	pus, College and Gra	pulls in alumni of a specified campus and college and range of grad years	Cc
4			•



3. Populate the parameters with the information you are wanting to view. If the fields are left blank, it will pull all data.

ew Smart Quer	у			88
Parameters Re	esults	Set save options		
Campus:		Campus University of Nebra		
	4	College		
College:	*	Agriculture an		
Grad Year betwe	en:	20	00	
and:		20	00	
🖉 Browse 🔳 Ex	port to (CSV 🗷 Export to Excel		
🕖 Help				Save Cancel

- a. **Campus** searches all Educational Institutions populated in Ali CRM. This includes other educational institutions besides University of Nebraska campuses.
- b. **College** is a table of all college fields populated in Ali CRM.
- c. **Grad year** is a date field for the graduation year.
- 4. Click the **Results** tab.

O ALI CRM

3ekele Kelly	Abeyo		No	
(elly			110	Lincoln
	Abrahams	Penke	No	Hooper
Alejandro	Amezquita		No	Lincoln
Brock	Anderson		No	Gothenburg
Vicole	Anderson		No	Lincoln
Rosemary	Anderson	Vinton	No	Whitman
ustin	Apel		No	Syracuse
esus	Arango-Gomez		No	Duncanville
krom	Artikov		No	West Des Moines
Vehmet	Bahadir		No	Ankara
(ala	Ball		No	Firth
oshua	Barber		No	Lincoln
Robert	Barger		No	Monticello
Anthony	Barrett		No	Lincoln
(arla	Bartels		No	Wymore
Christopher	Bauer		Yes	La Vista
Robert	Baumgart		No	Waukee
Andrew	Bennett		No	Papillion 🔹
	krock kicole kosemary ustin esus krom Alehmet (ala oshua oshua Oobert Anthony Karla Christopher Robert Andrew	krock Anderson kicole Anderson kosemary Anderson ustin Apel esus Arango-Gomez krom Artikov Adehmet Bahadir (ala Ball oshua Barber Kobert Barger Anthony Barrett Carla Baltes Christopher Bauer Kobert Baugart Anderew Bennett	irock Anderson ilicole Anderson Vinton Vorten Vort	irock Anderson No ilicole Anderson No losemary Anderson Vinton No losemary Angel No esus Arango-Gomez No krom Artikov No Adehmet Bahadir No cala Ball No coshua Barber No loshua Barber No loshua Barber No loshua Bartels No caria Bartels No caria Baurgart Ves lobert Baumgart No

- a. From the **Results** tab you can view up to 500 records.
- b. By clicking **Browse**, you can navigate to the constituent record from the **Results** tab.
 - Choose the page definition of **Constituent Page** and click **OK**.

C A L I CRM

Choose page definition
Open the selected record with:
Page Definition
Committee Fundraising and Giving Report Page
Committee Member Page
Committee Page
Constituent Correspondence Page
Constituent Documentation Page
Constituent Employment History Page
Constituent Funds Received Page
Constituent Group Memberships Page
Constituent Interactions Page
Constituent Page
Constituent Tribute Report With Default Constituent Page
Constituent Vendor Page
First Names Page
Network Connections
Online Information Page
Previous Group Members Page
OK Cancel

• The query results will create a new window at the bottom of the page and the constituent record will appear behind it.

Tasks PaperSave)r. Bekele G. Abeyo F	Ph.D.						2
Chardenda.	Indivi	lual Lookup ID: 45878	9						
Shortcuts	Constit	uencies: Alumnus							
Recent searches	Person	al Information	Contact Information		Addresses (1 of 3) 4	Prim	nary Relationships		
Recently accessed	Recently accessed		Primary phone A +1 402-613-8046 (Home) Primary email babeyo1@juno.com (Personal) Memberships		7941 Twin Oaks Rd Lincoln, NE 68516-6361 Ø Home (Current)	Spo Hou Prin Univ	Spouse Household Primary business University of Nebraska-Lincoln		
	Notes Media Attach Intera	: 0 ONOTE Inks: 0 Innents: 0 ctions: 0 OInteraction	ID: Statu Expiration: Level: Member since:	s:					
	1 Sho	w less							Customize tiles
🄎 Browse query results (441 records found								= 🖂
◀ Previous record ▶ Nex	t record View reco	rds with: Constituent Page	~						Show query
Lookup ID	First Name	Last Name	Maiden Name	Deceased	City	Stat	e Ca	impus	College
458789	Bekele	Abeyo		No	Lincoln	NE	Ur	niversity of Nebraska-Lin	Agriculture and Natural R 📤
459852	Kelly	Abrahams	Penke	No	Hooper	NE	Ur	niversity of Nebraska-Lin	Agriculture and Natural R
467565	Alejandro	Amezquita		No	Lincoln	NE	Ur	niversity of Nebraska-Lin	Agriculture and Natural R
458810	Brock	Anderson		No	Gothenb	urg NE	Ur	niversity of Nebraska-Lin	Agriculture and Natural R
467569	Nicole	Anderson		No	Lincoln	NE	Ur	niversity of Nebraska-Lin	Agriculture and Natural R 👻

- If you need to return to the query, click **Show Query**.
- c. To view the entire list, click **Export to CSV** or **Export to Excel.**
- 5. Once you've finished reviewing your results, cancel out of the New Smart Query without saving.