

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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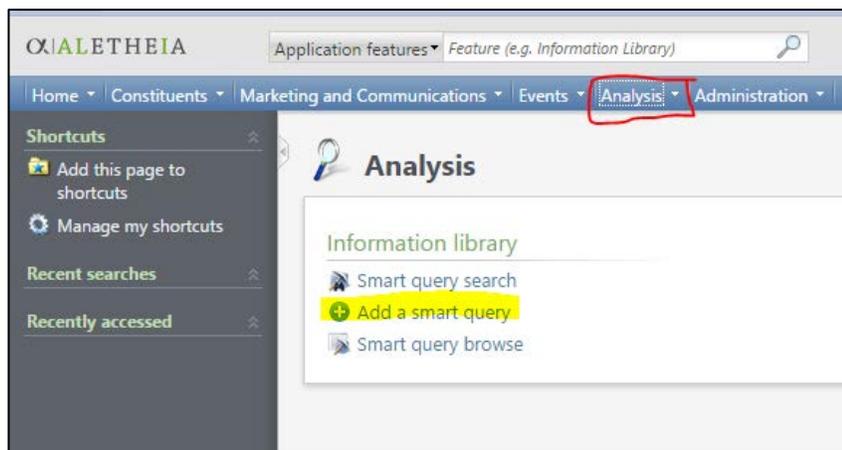
Alumni by Campus, College and Grad Year

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.

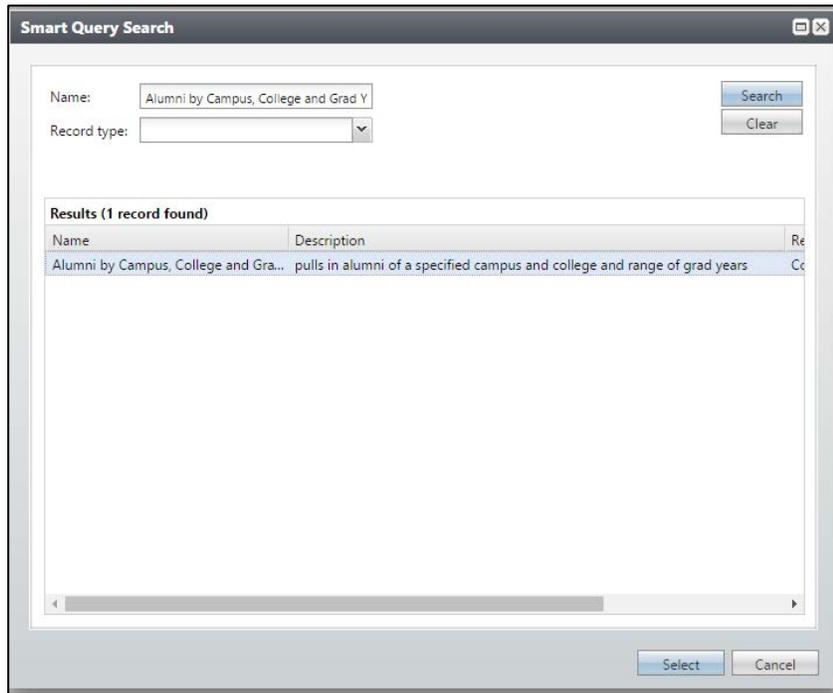
This query is particularly useful for university partners to identify the constituents they work with that are already in Ali CRM. It can be used to cross reference with other databases you work with. Once missing constituents are identified and added to Ali CRM, campus partners can more fully use Ali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

Running the Smart Query:

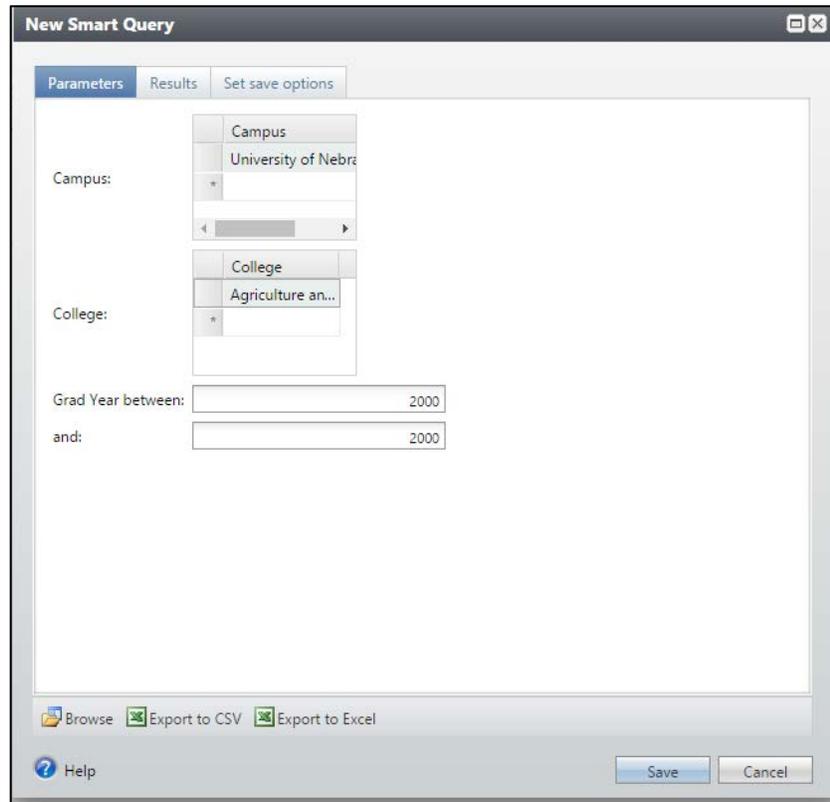
1. Go to the **Analysis** functional area and select **Add a smart query**.



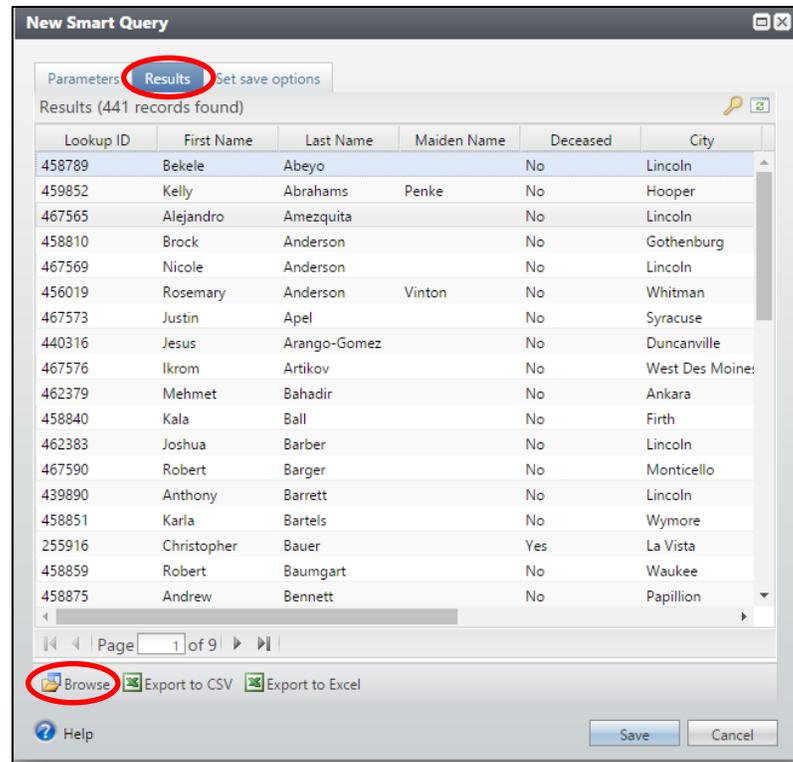
- In the **Smart Query Search** box, enter **Alumni by Campus, College and Grad Year** in the **Name** field and click **Search**. Once the results are populated, click **Select**.



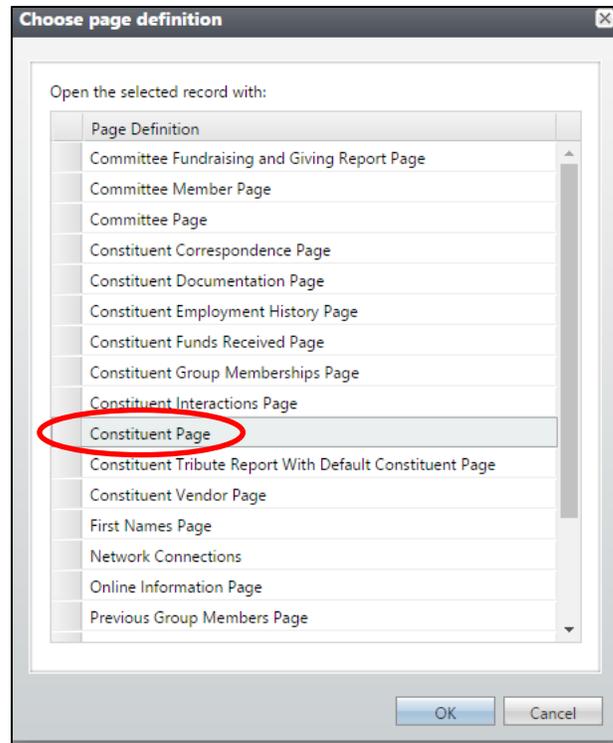
3. Populate the parameters with the information you are wanting to view. If the fields are left blank, it will pull all data.



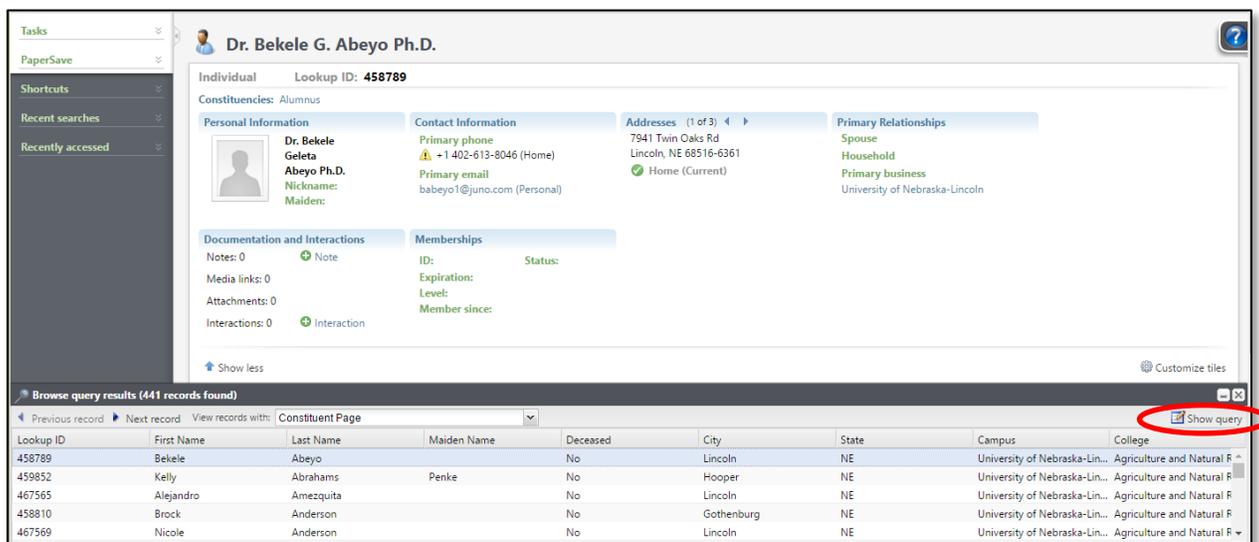
- a. **Campus** searches all Educational Institutions populated in Ali CRM. This includes other educational institutions besides University of Nebraska campuses.
 - b. **College** is a table of all college fields populated in Ali CRM.
 - c. **Grad year** is a date field for the graduation year.
4. Click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



- 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**.



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



- 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.