ALETHEIA CRM

Single Source Of Truth

Fundamentals
TRAINING MANUAL

Includes:

- Navigation
- Constituents and searches
  - Individuals
  - Organizations
  - Households
  - Committees

Version 2.0
Fall 2019

University of Nebraska
FOUNDATION

Ali CRM

The software referred to as Ali "**al**-ee" CRM derives its name from the Greek word Aletheia "al-uh-**thee**-uh", the Greek goddess of truth. The intention is to ensure Ali CRM is the single source of truth about advancement activities that benefit the University of Nebraska.

Ali CRM gives those who work in advancement, which includes efforts such as **fundraising, alumni relations, marketing and communication,** the ability to manage relationships and interactions with alumni, donors and friends. Ali CRM has many features to help users navigate, access and share information, and it provides a 360-degree view of the university's advancement constituents, allowing users to provide a customized, consistent experience for each alumnus or friend of the university.

NU Foundation Funds Online

NUFFO, pronounced "**new**-foe" is part of Ali CRM. The NUFFO portal provides fund and gift information to authorized users. The foundation cannot share specific gift amounts for donors in Ali CRM. Why? The university is subject to public records laws, and providing access to this information via the Ali CRM database or other paper or electronic records makes gift information subject to disclosure by the university as a public record.

Ali CRM + NUFFO users include affiliated partners from:
- the University of Nebraska
- the university alumni associations
- the University of Nebraska Foundation
- Nebraska Medicine

Ali CRM is the single source of truth for supporters of the University of Nebraska.

ALETHEIA CRM
Single Source Of Truth

FUNDAMENTALS OF *Ali CRM*
FOR UNIVERSITY USERS

TABLE OF CONTENTS

NOTES

Note about the Table of Contents: in its electronic format, navigation within this document may be swiftly accomplished by clicking the hyperlinked sections listed above. Depending upon your software, you may need to also hold down the CTRL key while clicking. Even-numbered page footers throughout the document contain a hyperlink returning you to this Table of Contents.

NAVIGATION

The purpose of *Ali* is to manage the relationships and interactions of those wishing to support the University of Nebraska's advancement efforts. Ali contains many features to help you navigate through, access, and share information.

Lesson Objectives

After you complete this lesson, you will be able to:

o   Identify navigation components.
o   Identify and access functional areas in *Ali*
o   Access **Help**
o   Customize the **Home** page.
o   Manage shortcuts

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How to Log on to *Ali*

For the best experience, Google Chrome is the recommended browser for accessing *Ali*:

Access *Ali* online: ali.nufoundation.org

Log on using UNF credentials:

Authentication Required	×
https://ali.nufoundation.org requires a username and password.	
User Name:	angie.taylor
Password:	****************
	Log In Cancel

To access *Ali*:

from your
computer

Blackbaud CRM™ for University of Nebraska Foundation

Blackbaud CRM
Access and update your data through your web browser without a plug-in.

Web dashboard
Create visual overviews of your data using charts, gauges and other nifty widgets, and organize these views using pages and folders.

Utilities
Download utilities and add-ins to popular applications such as Microsoft Excel and Vista Sidebar, or view various reference documents.

Endpoints
Browse the API's various endpoints and view their documentation.

Welcome to *Ali*

Josie Jones is *Ali*'s sample constituent. If you wish to practice a new task in *Ali* before committing to actually performing the task in the real *Ali* environment, you may safely utilize Josie Jones as a test subject.

This screen shot explains the key components of a **constituent record** in the full (not mobilized) version of *Ali*:

Ali is a web-based application. The following items are notable:

- The **Back** button on your browser may assist in navigation. **Recent searches** in the bottom left of the explorer bar is often the faster way to return to information you have recently accessed.

NOTES

- Each record in *Ali* possesses its own unique URL or web address. To quickly share information you are viewing with another *Ali* user, you may copy and paste the entire URL from the browser's address bar and share it with another user (for example, by emailing the URL to your colleague.) They will be able to view the identical record if their security permission permits.

- There is no restriction to the number of people simultaneously accessing a record in *Ali*, and records are updated (with limited exception) in real time.

Navigation Components

Each area of the program shares similar components to help you navigate. These components include the menu bar, navigation bar, and explorer bar.

Menu Bar

From the **Menu Bar,** you can access the organization calendar, or search for a record or feature. Depending on your system role, you can also use the **Welcome** menu in the upper right to change your password.
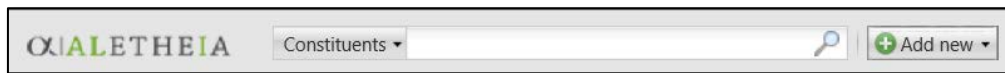
The following table identifies the search types available and includes a description of each.

Search Type	Description
All Features search	A quick navigational tool that searches pages, tasks, and RSS feeds. To perform a feature search, click **All Features** in the search menu.
RSS feeds search	Really Simple Syndication (RSS) feeds publish lists of data in a single location for your view. Search for RSS feeds that meet your criteria. To perform an RSS feed search, click **RSS feeds** in the search menu. RSS feed functionality is an upcoming feature in *Ali*.
Quick find search	You can search for and open specific records. To perform a quick find search, choose a functional area from the search menu.

Help Tab

The **Help** feature is a tabbed panel that allows *Blackbaud's* Help topics to be accessed directly while logged into *Ali*. When you click **Help**, a panel appears from the right side of your screen and can be detached for easy viewing. The Help Panel displays content specific to your page or screen. The following table identifies the key topic areas within the help tab and includes a description of each.
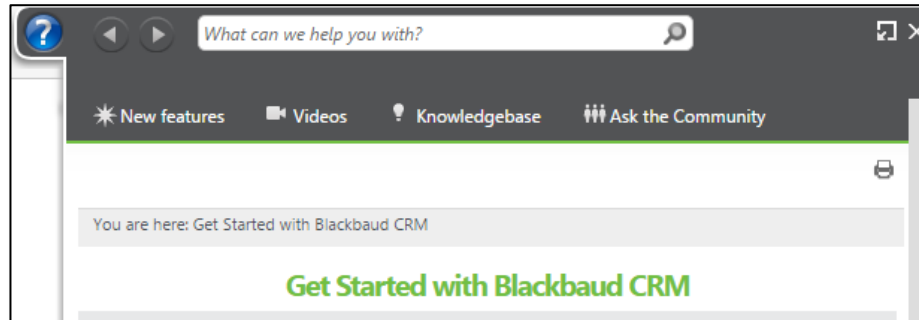
Help Area	Description
New Features	Highlights new features and changes to existing features. A downloadable guide and related topics are also available.
Videos	Redirects you to Help videos available on www.Blackbaud.com
Knowledgebase	Links you to Blackbaud's support site to search for resources.
Ask the Community	Redirects you to help communities available on Blackbaud.com

NOTES

Tip: *Ali*-specific content including links to login, support, and electronic training materials & resources can be found at:

www.nufoundation.org/ali

Note - this is different than the *login* site for *Ali*:

ali.nufoundation.org

Navigation Bar

Functional Areas

The functional areas are located in the blue navigation bar across the top of the screen. Areas available to each user in *Ali* are dependent upon the security rights and systems roles applied to individuals based on job roles and responsibilities. **Based on your role, you may have one or more of the following permissions: view; edit; add; and/or delete content in *Ali*.** The following table identifies all the functional areas in *Ali* and includes a description of each, even though most users will not have access to all segments identified:

Home ▾ | Constituents ▾ | Marketing and Communications ▾ | Events ▾ | Memberships ▾ | Volunteers ▾ | Analysis ▾ | Administration ▾

Functional Area	Description
Constituents	Information related to the constituents who interact with and support our organization.
Marketing and Communications	Marketing efforts used to solicit donations. Management of communications with constituents.
Events	Information related to events for alumni, donors, and friends of the university.
Volunteers	Information about the volunteers who perform activities or specialized work for our organization without pay.
Analysis	Queries used to analyze the data in *Ali.*

Functional Area	Description
Administration	Configuration tasks including export definitions used for outgoing communications.

Explorer Bar

The explorer bar provides tools to add and manage **shortcuts** to program pages. It displays recently-performed searches and recently-viewed records and pages, and is customizable by each user. Depending on the current page, you can also access related tasks and activities.

Manage Shortcuts

You can use the **Shortcuts** feature to create shortcuts to pages and records that you access frequently. You can also organize shortcuts in the same manner you customize your **Home** page.
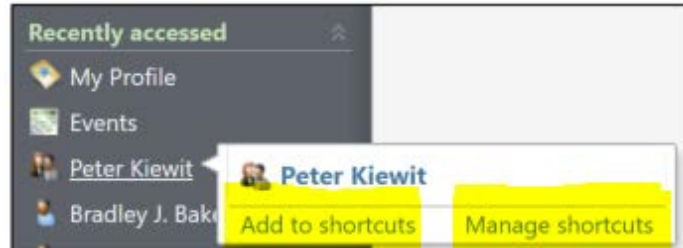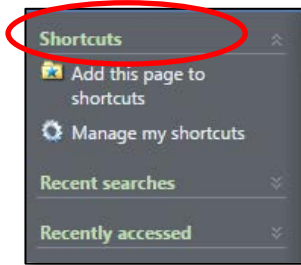
To Add a Shortcut:

1. Open the location you want to save as a shortcut.
2. On the explorer bar, click the **Add this page to shortcuts** link.
3. *-OR-* From the Shortcuts menu on the explorer bar, click **Manage my shortcuts.** The **My Profile** page displays.
    a. Click **Add** a task.
    b. In the **Functional area** frame at left, select the functional area containing the task(s) to which you want to link. All tasks display in the **Task** box frame on the right.
    c. Mark the checkbox for each task needing a shortcut.
   **d.** Click **Save.**

Tip: In *Ali,* there is often more than one way to see the same content or complete the same task. For example, in addition to the steps above, you may instead rest your mouse pointer over a record in the left pane and click **Add to shortcuts** to add the item to a favorites list. You may add shortcuts to constituents, organizations, purposes/designations, events, search tasks, and more. **Customize this area for quick access to the content you use most.**
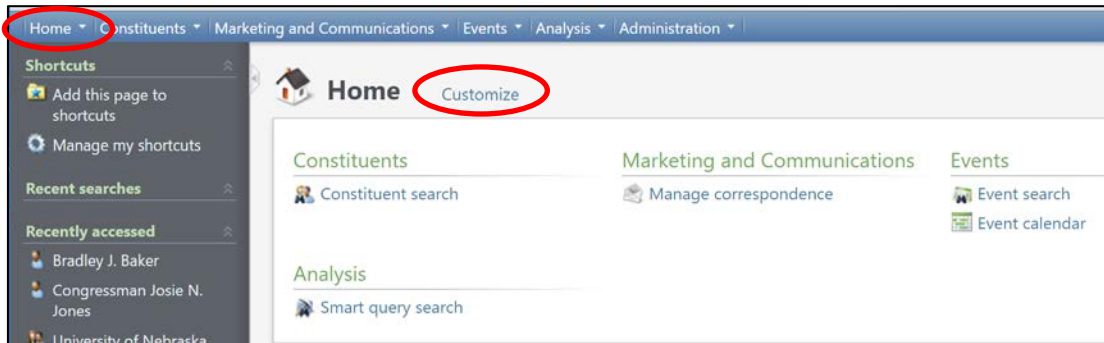

Try It…

Practice adding shortcuts to the explorer bar for information you frequently access. For example:
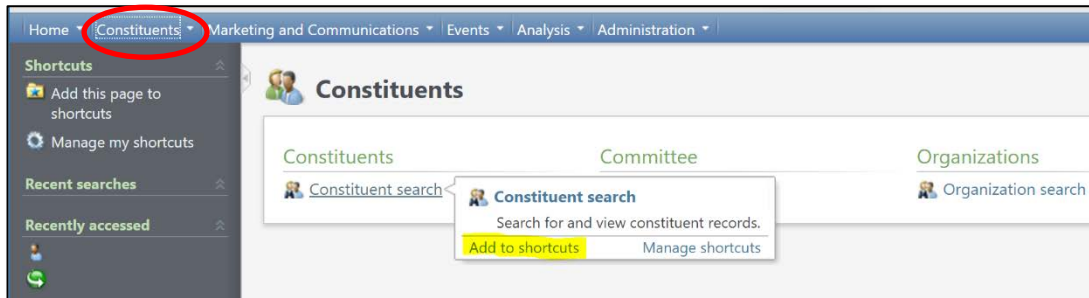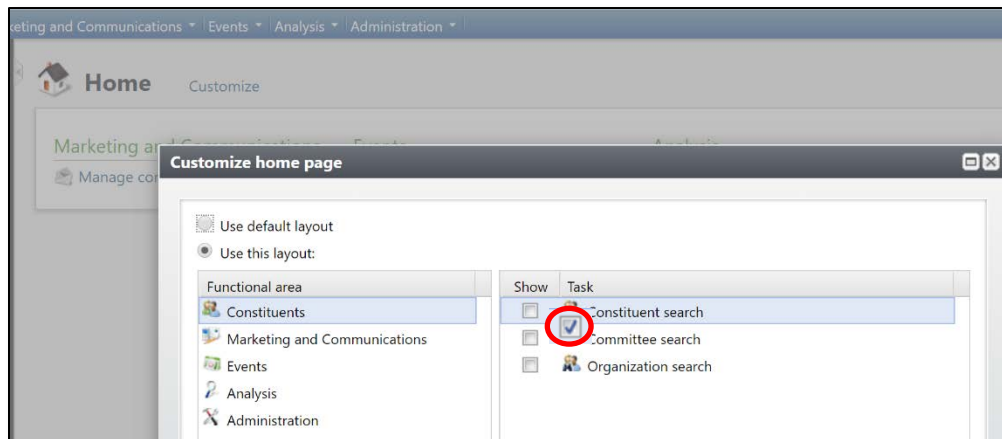
Customize the Home Page

If your system role allows, you can customize the **Home** page to add and remove tasks.

To Customize the Home Page:

1. On the navigation bar, click **Home**.

2. At the top right corner of the **Home** page, click **Customize.**

3. Click **Use this layout**.

4. In the **Functional Area** frame at left, select a functional area. The tasks for the area display in the **Task** frame at right.

5. In the **Task** frame, mark the **Show** checkbox for the tasks to include on the **Home** page.

6. Click **Save**.

Try It…

Explore the customize home page area and add and/or remove a task.

Summary

o   Web pages in *Ali* – known simply as **Pages** – share similar features, including the menu bar, navigation bar, and explorer bar which help you navigate.

o   The navigation bar displays icon links to the functional areas including Constituents, Events, and Marketing and Communications. The functional areas you have access to depend on your security rights and user role.

o   The application-level search function helps you find a specific feature in the application. Use the **Find** field to find tasks, RSS feeds, and help documentation.

o   You can customize the look and feel of your **Home** page to quickly access areas you commonly use.

CONSTITUENTS

Constituents are the individuals and organizations who support advancement efforts benefiting the University of Nebraska. Constituents can be alumni, donors, board members, volunteers, trustees, corporations, businesses, foundations, prospects, or event attendees.

Constituent records in *Ali* allow us to manage relationships and interactions with each of our constituents. Data from constituent records are used to process and analyze reports, create mailings, and manage exports. These processes and analyses help cultivate relationships with our constituents.

Lesson Objectives

After you complete this lesson, you will be able to:

o Access the **Constituents** page.
o Search for a constituent.
o Navigate the tabs on an individual constituent record.
o Navigate to the constituent pages accessible on the explorer bar.
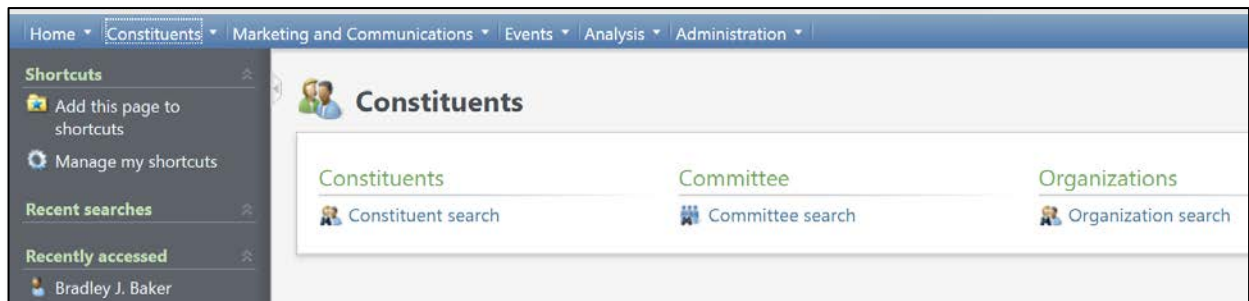o Navigate the tabs on an **Organization** record, a **Committee** record, and a **Household** record.

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The Constituents Page

On the **Constituents** page, you will view all aspects of our constituent records.

The following table lists the task groups available and includes a description of each. Most users will only see a portion of this overall functionality.

Task Group	Description
Constituents	Search for constituent records and display an interactive map to view constituents by geographical locations.
Committee	Committee constituent records.
Organizations	Organization constituent records.

Constituent Record Types

Ali has four distinct constituent record types. The table below identifies the constituent record types available and includes a description of each.

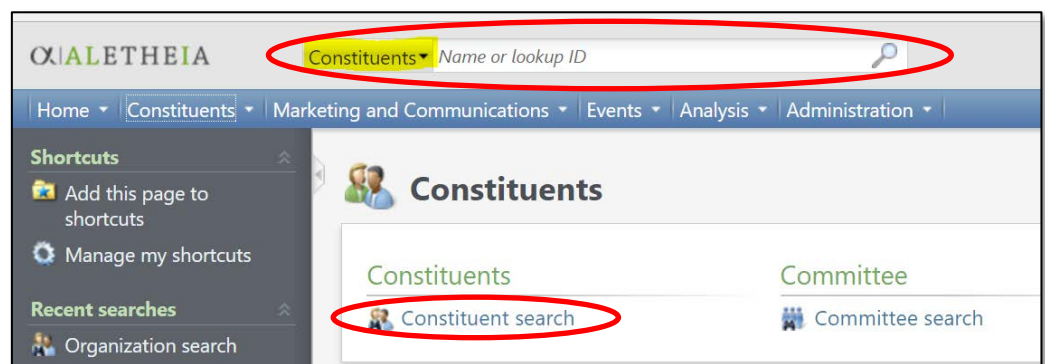| Record Type	Description
Individual	The people, including donors, who support our advancement efforts or interact with our organization in other ways.
Organization	Companies, foundations, and businesses that support our advancement efforts or interact with our organization in other ways.

Record Type	Description
Committees	Associate individuals or organizations as members of a committee for managing and reporting purposes. Committees may plan events, set financial fundraising goals, and set non-financial committee goals.
Households	Individual constituents who are married or life partners.

Constituent Search

Search for a Constituent Record

There are several ways to conduct a constituent search:

1. Type a name or Lookup ID directly in the top menu bar if you have the menu bar set to search **Constituents** – *OR* – with the field blank, you may click the **magnifying glass** to open a blank search window that opens as described in Step 2 (below.)

2. A second way to search for constituents is via the functional area on the blue navigation bar: click **Constituents**.

   a. In the **Constituents** task group, click **Constituent Search**.

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b. Enter the constituent name or other known information in the data fields. You can use wildcard characters to replace part of your search phrase:

i. Asterisk (*) or percent sign (%) takes the place of one or more characters

ii. Question mark (?) or underscore (_) takes the place of an individual character

3. Click the chevron next to **Show advanced search options** to expand advanced search options.

4. Click **Search** to begin the search.

5. Click **Clear** to remove all criteria and begin a new search.

6. Click anywhere in the row displaying the constituent name in **Results** to open that constituent's record.

Notes about searches:

- Note the arrangement of **Last / First Name** (only) search boxes, in the **Advanced Search Options** graphic, below. The top **Name/Lookup ID** allows you to input *all* name information there, *OR* if you break apart the name as last/first, you must use the second and third boxes (see below.)

- *All* results that meet your search criteria display in the results grid. This means *Ali* may display several instances of a constituent record (as evidenced below in red rounded rectangles; note the repeat Lookup IDs.) Each oval represents the same person or single constituent record, which is displayed several times because several search criteria were met. Checking the box for **Only search primary address**, for example, will significantly narrow your search results.

- **Tip:** The filter settings you apply in the **Advanced Search Options** window are "sticky", and will reappear next time you return to conduct a new search. If there is one overarching tip for how to be successful in *Ali* when you are attempting to access the information you seek, remember this: if at first your results are not returning the expected information CHECK YOUR FILTERS, which are by default nearly all "sticky." To reset the filters to their default, click the **Clear** button.

- By default, deceased constituents are not included in searches.

- You may adjust to search *only* for **Organizations**, or *only* for **Individuals**, for example, by unchecking **Search in** selection(s).
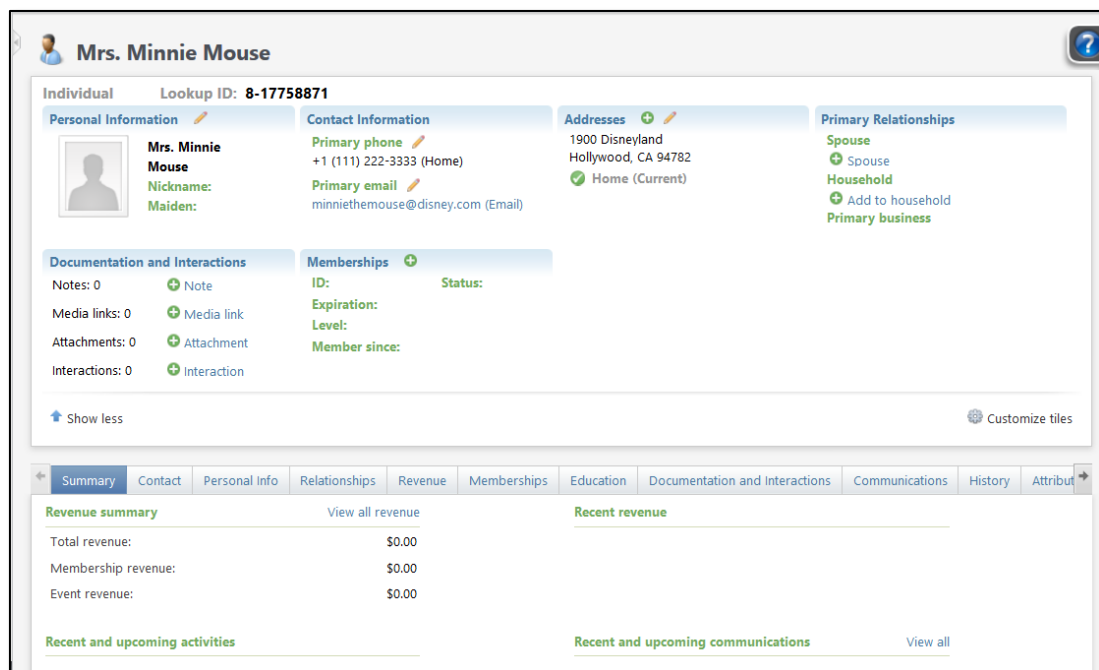
Advanced Search Options:

You may wish to record the ID numbers for constituents and organizations you most commonly reference here:

The Individual Constituent Record

The individual constituent record is used to view information related to an individual constituent.

Summary Tiles

At the top of the constituent record, profile information about the constituent appears in a series of summary tiles.

CONSTITUENTS

Customize the Summary Tiles:

1. Open the constituent record.

2. Click **Customize tiles**.

3. Select the summary tile to view all records of this type.

   a. To include a tile, use the arrows to move the tile name into the **Show these tiles in this order** list.

   b. To exclude a tile, use the arrows to move the tile name in the **Do not show these tiles** list.

4. Under **Show tiles in this order**, you can change the order of the tiles.

   a. Select a tile and then use the up and down arrows to move the title into the preferred order.

5. Click **Save**.

Above the **Summary Tiles**, information about the record type, lookup ID, and active constituencies are always visible. Important notifications, such as deceased status, also appear above the tiles.

Below is some general **tile** functionality:

- You can view constituent information from the tiles.

- You can navigate to tabs on the record.

- You can navigate to other constituents, or to other records in *Ali.*

- You can customize the tiles that displayed and rearrange their order.

NOTES

Constituent Tabs: General Tab Functionality

The constituent record also contains multiple tabs to help you navigate, view and manage additional information about the constituent. **Your system role, site, and security rights will determine what tabs you are able to see.**

- **Tiles and tabs are linked.** When you click a link on a tile, the related tab opens below. When information is added or edited in a tile or tab, the related tabs and tiles automatically update.

- Most tabs have **second-tier tabs** (sometimes called **sub-tabs**) that make it easy to navigate the record.
- **You can drag and drop tabs into any order you prefer.** This order is saved the next time you open a constituent record. The tab at farthest left is the tab that will be displayed by default.
- **Tabs may be quite numerous.** Watch for the arrows indicating additional content extending beyond the edges of your screen.
  Tip: Depending upon what browser you use, you may be able to rest your mouse pointer on the top row of tabs and then roll the mouse wheel up and down to quickly scroll side to side across the tabs.

Column headings and sorting functionality

▪ If a column's width needs to be adjusted, simply rest the mouse over the gray column heading's right edge – it will become a double-headed arrow – allowing you to expand or narrow the column width.

▪ Another feature is **Autosize all columns**, found by clicking the **More** button located on many tabs. This will widen or shrink columns to fit content onto your screen width.

▪ Certain tabs contain **information that is sortable** by clicking on the gray column heading. Clicking that same heading a second time re-sorts ALL the information (even across multiple pages) in reverse order and acts as a toggle. The small black arrow in the header row identifies how the content is being sorted.

Constituent Tabs: Where to Find the Information You Need

The table below lists the tabs available on the individual constituent record with a description:

Tab Name	Sub-tabs (also called Second-tier Tabs)	Description
Summary	N/A	Overview of an individual constituent, including recent and upcoming communications and activities.
Contact	N/A	Constituent's contact information, including addresses, phone numbers, email addresses, and social media accounts.
Personal Info	• Personal • Constituencies	Personal information about a constituent such as the nickname, maiden name, birth date, website, interests and constituencies.
Relationships	• Relationships • Relationship Tree • Extended Relationships • Committees	The familial, social, or professional associations of constituents, including information about the committees or household of which the constituent is a member.
Revenue	• Recognition	A snapshot of a constituent's recognition information.
Memberships	N/A	Information related to the constituent's membership programs.
Volunteer	• General • Availability • Timesheets • Awards • Documentation	Volunteer information for the constituent. The tab contains multiple second–tier tabs to help you navigate. Alumni Associations will be the main users of the Volunteers functionality in *Ali.*

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CONSTITUENTS

Tab Name	Sub-tabs (also called Second-tier Tabs)	Description
Prospect	• Prospect Summary • Prospect Manager History	Major giving prospect information for the constituent. The tab contains second-tier tabs to help you navigate. For this tab to be visible on the constituent's record, the **Prospect** constituency must be applied.
Education	N/A	Information related to any higher learning institution a constituent attends or attended.
Documentation & Interactions	• Documentation Summary • Constituent Documentation • Interactions • Surveys	Documentations, interactions and surveys for the constituent.
Communications	• Communications • Appeals • Preferences • Newsletters	A snapshot of bulk (or mass) communication with the constituent and a view of the constituent's communication preferences.
Attributes	N/A	Constituent attributes store specialized information about a constituent when a field or tab is not available for that information.
Events	N/A	Event information and constituent preferences including events the constituent has been invited to and attended.

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Tab Name	Sub-tabs (also called Second-tier Tabs)	Description
Smart Fields	N/A	Smart fields that provide quick access to specific, calculated information.

Summary Tab

The **Summary** tab displays an overview of an individual constituent. The following table identifies the frames available and a description of each.

Frame	Description
Recent and upcoming activities	The most recent or pending interactions or activities associated with the constituent.
Recent and upcoming communications	The most recent or pending communications associated with the constituent.

Contact Tab

On the **Contact** tab, you may find the constituent's address, phone number, email address, and social media account information.

Social Media Accounts

The following types of social media accounts will be tracked in *Ali*:
Facebook, Instagram, LinkedIn and Twitter.

Tip: Updating Contact Information in *Ali*

How to Add new or Updated Constituent Information such as Address, Phone Number, Social Media Account, or Other Contact Information for Records in *Ali*:

Send an email to: systemsinformation@nufoundation.org

Please provide:

- o Constituent Lookup ID (if this is a new constituent, IDs are system generated)
- o Constituent Name
- o The details necessary to make the update and how the information was determined

Once the change is made in *Ali*, you will receive a confirmation email.

This process is slated for change and will be revised – and further automated – at a future date.

NOTES

Personal Info Tab

On the **Personal Info** tab, you can access personal information about the individual constituent.

The following table identifies the second-tier tabs available, and includes a description of each:

Sub-tab	Description
Personal	Personal information about the constituent including: nickname, maiden name, birth date, website, interests, demographics (including ethnicity), and alternate look up IDs (such as from legacy systems or NU ID). Event restrictions, including special dietary needs (if/as identified) may be viewed here as well. Name formats used on correspondence mailings, and aliases, including former names, acronyms, and alternate names.
Constituencies	The constituencies the constituent has with our organization. These constituencies appear at the top of the constituent record.

Constituencies Sub-tab

Constituencies define the affiliations constituents have with the university. A constituent can have multiple constituencies that can start, end, and overlap. You can use constituencies to define these relationships and group similar constituents in queries, mailings, and reports. Constituencies are found in two places. One is here on the **Personal** tab, **Constituencies** sub-tab:

The second is at the top of the constituent record:

Tip: By clicking on the constituency listed in bold above, the related content will activate in the affiliated sub-tab group below, allowing you to quickly jump to the information you seek.

Relationships Tab

Relationships are familial, social, or professional associations for the constituent. A relation must have a constituent record in the database.

NOTES

Relationship information is tracked on multiple second-tier tabs. The following table identifies the second-tier tabs available, and includes a description of each.
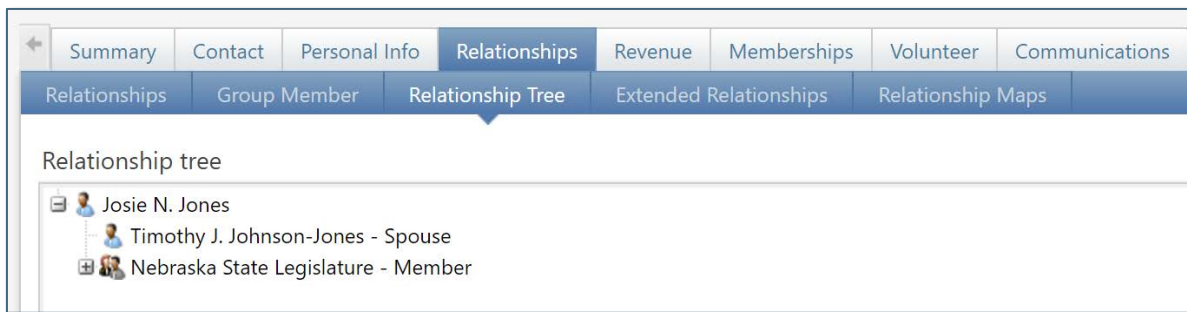
Tab	Description
Relationships	The relationship and employment history for the constituent.
Relationship Tree	A relationship tree of a hierarchal view of the constituent's relationships entered on the **Relationship** tab.
Extended Relationships	Organization with a confirmed relationship with the constituent.

Individual Relationship Sub-section

Individual relationships are the people with whom the constituent is associated including spouse, friend, family member, or business associate.

Organization Relationship Sub-section

Organization relationships are the businesses, foundations, agencies, and other organizations that have an association with the constituent.

Relationship Tree sub-tab

The **Relationship Tree** sub-tab visually displays all the constituent's relationships entered on the **Relationships** tab. You can view each relationship or expand to view all relationships for each entry in the relationship tree. Names in the list are hyperlinked, so if you double-click on an individual, *Ali* will pull up that constituent's record.
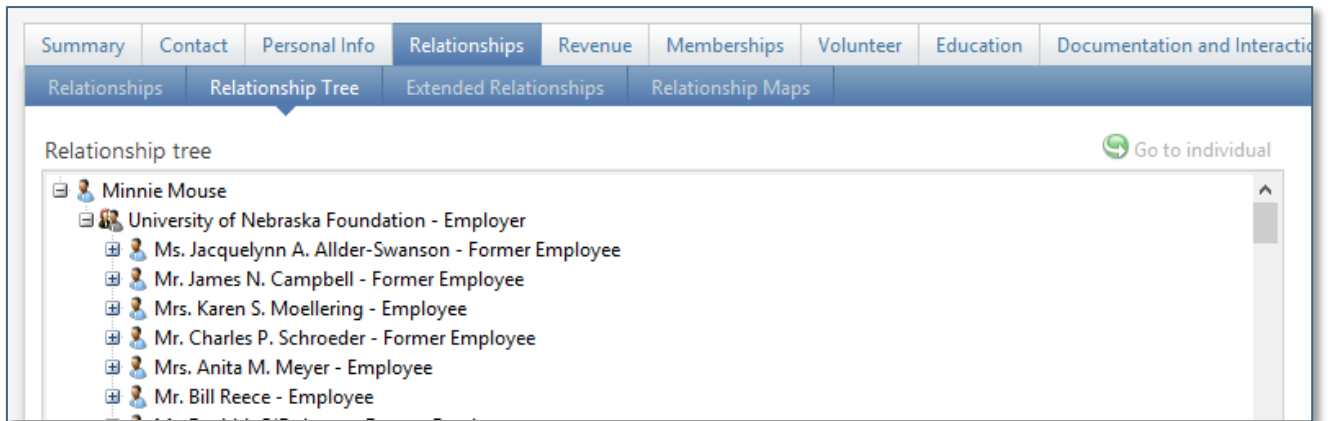
Revenue Tab

The **Revenue** tab displays information about revenue associated with the constituent. You can also view the constituent's recognition defaults.

Memberships Tab

The **Memberships** tab displays all the memberships for the constituent, including the program name, level, and status. You can access several aspects of the constituent membership from this tab.
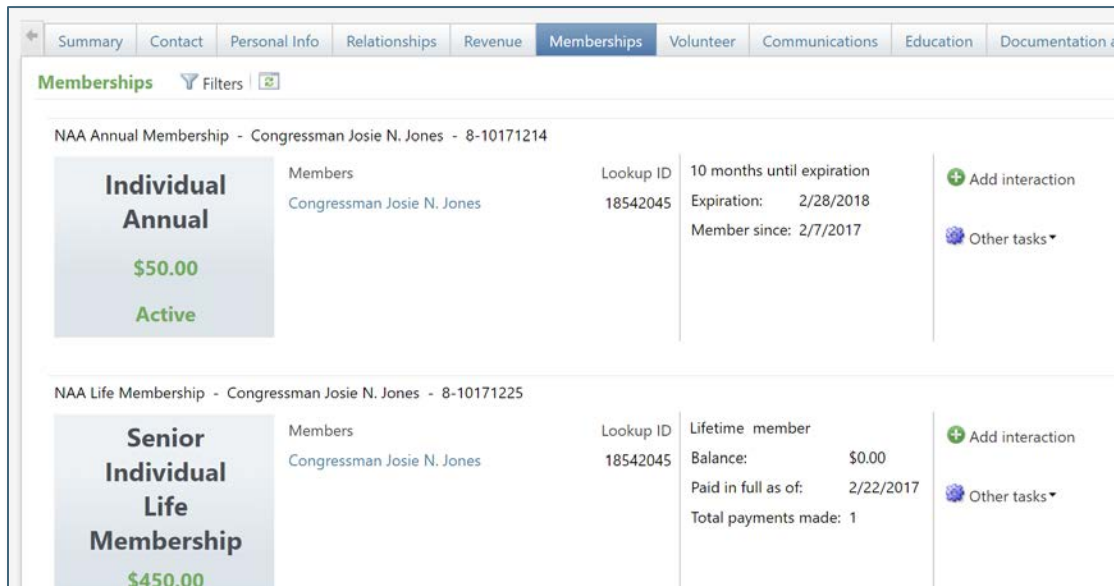
Please refer to additional information about **Memberships** in the Appendix.

Volunteer Tab

The **Volunteer** tab displays several second-tier tabs that contain information about traits, availability, volunteer types, and notes for the constituent. Additional training materials about this topic are available online.
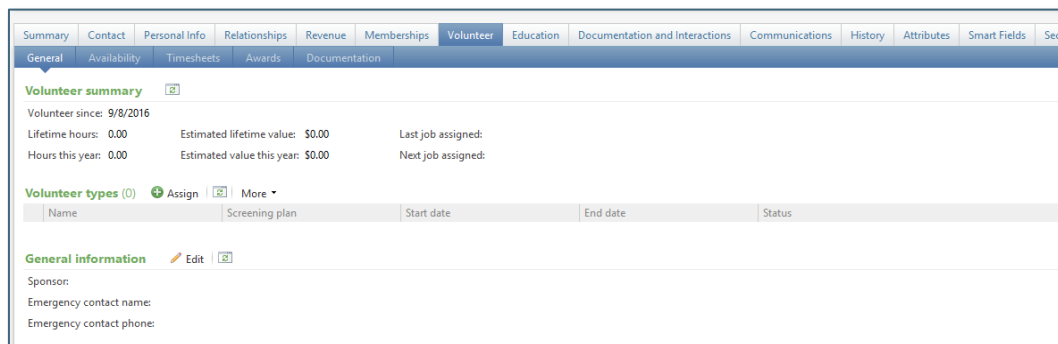
Prospect Tab

The **Prospect** tab displays second-tier tabs that contain **Prospect Summary** and **Prospect Manager History** information.

The **Prospect** tab is present only o**n** select constituents the organization has engaged or plans to engage for the purpose of soliciting a major gift.
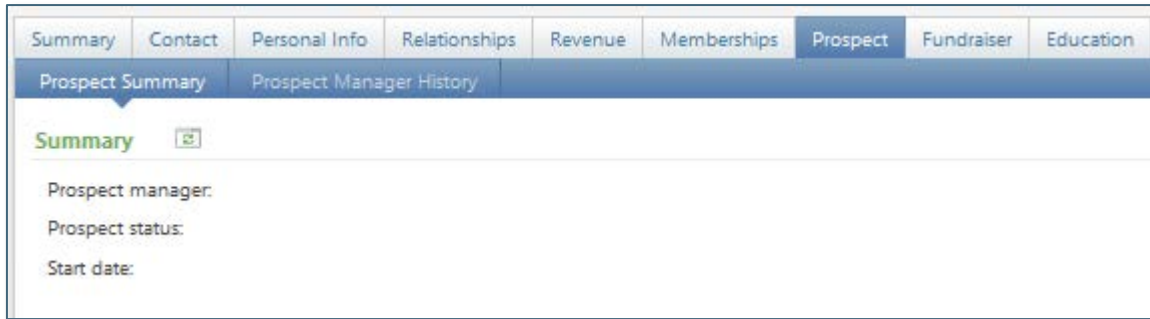
Education Tab

On the **Education** tab, you can see information regarding any higher learning institution a constituent attends or attended and other education-related information.
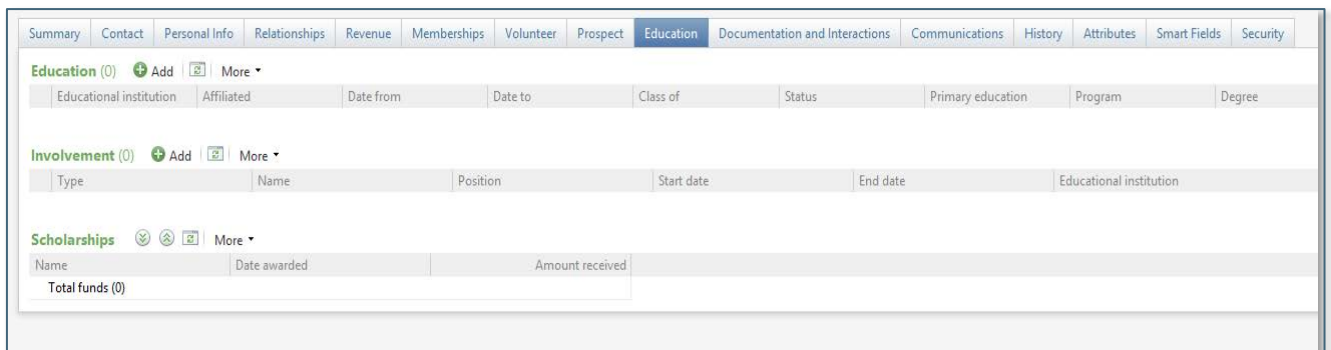
Documentation & Interactions Tab

On the **Documentation** & **Interactions** tab, you can use second-tier tabs to manage helpful and interesting information about a constituent.
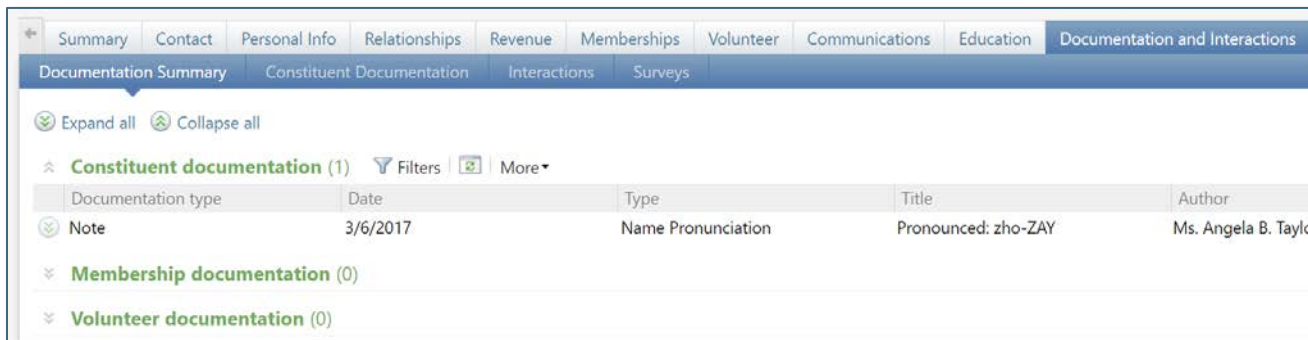
The following table identifies the second-tier tabs available, and includes a description of each.

Sub-tab	Description
Documentation Summary	View and edit all note information in the database related to this constituent. When you edit existing note information from this location, the related functional area is also updated.
Constituent Documentation	Notes, media links and websites.
Surveys	View the surveys our organization has sent the constituent or in which the constituent has participated. Includes information about the survey such as related constituent responses and documentation.
Interactions	Interactions and responses for the constituent.

Notes

Notes allow you to create separate categories or types of notes and assign security to the information they contain based on the notepad type.
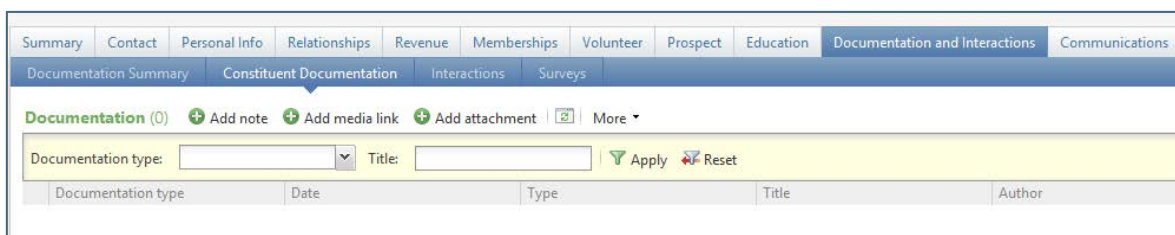
Please refer to the **Interactions in *Ali*** segment located in the [Appendix](#) for very important information about documenting interactions, as well as significant notes about confidentiality.

Notifications

Notifications allow a message to be displayed on a constituent's record. This is used to alert other *Ali* users of specific items/requests pertaining to this individual or organization. This will be displayed either by a pop-up window, a notification under the constituent's name, or both.
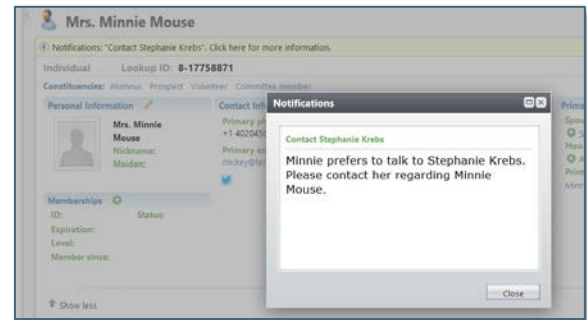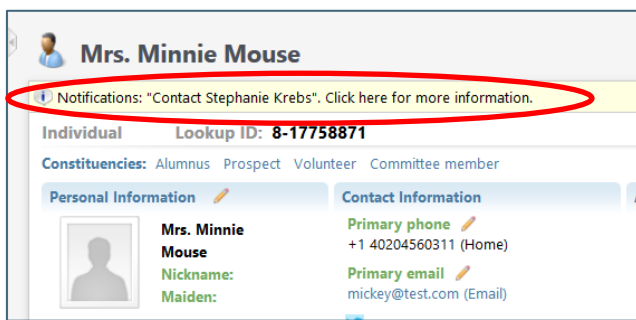
Communications Tab

On the **Communications** tab, which pertains specifically to *bulk or mass* communications, you can view the various communications and appeal mailings sent to the constituent.

The following table identifies the second-tier tabs available, and includes a description of each.

Sub-tab	Description
Communications	All bulk or mass mail and email communication our organization has with the constituent.
Appeals	Information about each appeal, such as its date, mailing, and the constituent response to the appeal.
Preferences	The communication preferences for the constituent.
Newsletter	For partners utilizing *Blackbaud Internet Solutions (BBIS),* information about the online newsletters our organization sends to the constituent will be viewable here. The **Name** column lists the names of the newsletters sent to the constituent. Certain user groups – such as UNOAA, IANR, UNKAA and UNMCAA utilize *BBIS.*

![tip lightbulb icon] **Tips:**

- The topic of enhanced *Ali* functionality involving **General Correspondence** for the purpose of mass/bulk mailing – such as a development officer introduction letter or a campus announcement – is available as a separate training topic. Resources are available online here.

- Writing a semi-automated "one-off" letter (and associated linked interaction) addressed to a specific constituent – from within a constituent's record – is available in the **Communications** section of the Appendix.

Communications Sub-Tab

The **Communications** sub-tab displays the various forms of **bulk communication** our organization has with the constituent. These communications might include newsletters, event invitations, event registration acknowledgments, and appeal mailings.

For each communication, you can view the date of the communication, its type, and whether the constituent responded to the communication.

Date sent	Communication	Details	Has responses	Site
This month				
3/25/2017	General Correspondence	Giving Society Corresponde...	No	
3/23/2017	General Correspondence	UNL Business Magazine	No	UNL Busin
3/22/2017	Event Invitation	17 NAA YAA Baseball Event...	No	N/A
Older				
12/19/2016	Appeal Mailing	1LACCT16 - CDFALL	No	All sites
12/16/2016	Appeal Mailing	1F16 - TFF	No	All sites
12/1/2016	Appeal Mailing	FOUNDATION COMM - Bur...	No	All sites
11/14/2016	Appeal Mailing	1L16 - CDYE	No	All sites
10/26/2016	Appeal Mailing	1PG16	No	All sites
10/24/2016	Appeal Mailing	1L16 - SMCDFALL	No	All sites

NOTES

Appeals Sub-tab

The **Appeals** sub-tab displays the appeal mailings our organization sends the constituent. Appeals are planned efforts our organization performs to contact constituents and generate gifts.

Preferences Sub-tab

On the **Preferences** sub-tab, you can see the communication preferences for the constituent. Communication preferences help ensure our organization communicates with constituents in ways they prefer.

Solicit Codes

Solicit codes provide a convenient method for flagging constituents as "exceptions to the rule" for our fundraisers. These codes tell you there are certain rules to follow when communicating with the constituent.

Examples of solicit codes include:

- Summer mailing only
- One solicitation annually
- No mail temporarily

Mail Preferences

Mail preferences allow you to define specifics about how a constituent wants to receive mail.

Rather than set mail preferences separately for each mail type, you can set mail preferences for all the mail types. When you set a mail preference for all mail types, existing mail preferences are replaced with this mail preference.

Attributes Tab

On the **Attributes** tab of a constituent record, you can view constituent attributes. **Attributes** tabs store specialized information about a constituent when no field or tab exists for that information. It is possible to query on attributes to gather constituents who share a common characteristic.

Smart Fields Tab

Smart fields provide users quick access to specific, calculated information that otherwise would require time and the configuration of queries and reports to view.
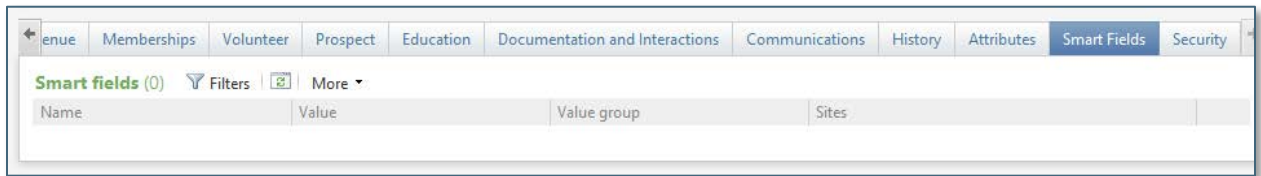
Organization Records

Organization records track information about the companies, businesses, associations, schools, clubs, and foundations associated with advancement of the University of Nebraska.

Search for an Organization Record:

1. On the blue navigation bar, click **Constituents**.

2. In the **Constituents** task group, click **Organization Search**.

3. Enter the Organization name or other known information in the data fields.

   Tip: You can use wildcard characters to replace part of your search phrase:
   o   Asterisk (*) or percent sign (%) takes the place of one or more characters
   o   Question mark (?) or underscore (_) takes the place of an individual character

4. Click **Search** to begin the search.

NOTES

5. All results that meet your search criteria display in the grid. Click the organization name in the results to open the record.

Primary Organization Search

Tip: *Ali* has **Primary Organization** search functionality. While organizations *will* display during a constituent search, it may be to your advantage to conduct a specific **Organization search** instead. A primary organization is defined as the identified, *primary* organization with which the University of Nebraska Foundation and its affiliates most generally work. By selecting this option on the organization record search under **Advanced search options**, your result will show our *primary* contact. See below for step by step instructions.

Search for a Primary Organization Record:

1. On the blue navigation bar, click **Constituents**.

2. In the **Constituents** task group, click **Organization Search**.

3. Enter the Organization name or other known information in the data fields. You can **use wildcard characters** to replace part of your search phrase:

- o Asterisk (*) or percent sign (%) take the place of one or more characters
- o Question mark (?) or underscore (_) takes the place of an individual character

4. Click the chevron next to **Show advanced search options**

  a. Check **Only search primary organizations**

5. Click **Search** to begin the search.

6. All results that meet your search criteria display in the grid. Click the organization name in the results to open the record.

CONSTITUENTS

Constituency Name:	Definition
Corporation	A business, partnership or cooperative that has been organized for profit-making purposes, including those owned by individuals and families and other closely-held companies.
Foundation – Corporate	A foundation that is directly associated with a corporation. This foundation may make gifts and grants independently or match philanthropic giving by their employees.
Foundation - Family	A **family foundation** is one in which the donor or the donor's relatives play a significant role in governing and/or managing the **foundation**. It is feasible that a foundation would begin as a family foundation but evolve into a private foundation after the death of the donor and/or donor's relatives.
Foundation – Private	A nonprofit organization which is usually created via a single primary donation from an individual or a business and whose funds and programs are managed by its own trustees or directors.
Fundraising Consortia	Entities that have been formed by a group of cooperating institutions or organizations for facilitating their fundraising activities.
Government	Government entities such as public schools, police departments, city or state agencies, etc.
Religious Organization	Churches, synagogues, mosques, temples and other houses of worship, as well as their denominational entities, hierarchies and service groups.

The Organization Record

Much of the information on organization records is organized on tabs. The following table identifies the tabs that are specific to an organization record with a description of each.

Tab	Second-tier tab	Description
Organization Info	• Organization • Constituencies	The organization details, demographics, matching gift conditions, alternate lookup IDs, and interests. View aliases, acronyms, alternate names, and constituencies.
Relationships	• Relationship • Relationship Tree	Individuals and organizations with whom the organization is associated.
Organization History	N/A	Parent and corporate merger history information.

Organization Contact Relationships

Organization-specific contacts are tracked as relationships on the organization record.

Committees

Committees are a specialized type of group in *Ali*. **Committees help you see the activities of everyone included in the committee.** The UNF Board of Directors is an example of a Committee in *Ali.*

The Committee Record

Much of the information on committee records is organized on tabs similar to tabs found on an individual constituent record. The following table identifies the tabs that are specific to committee records and includes a description of each.
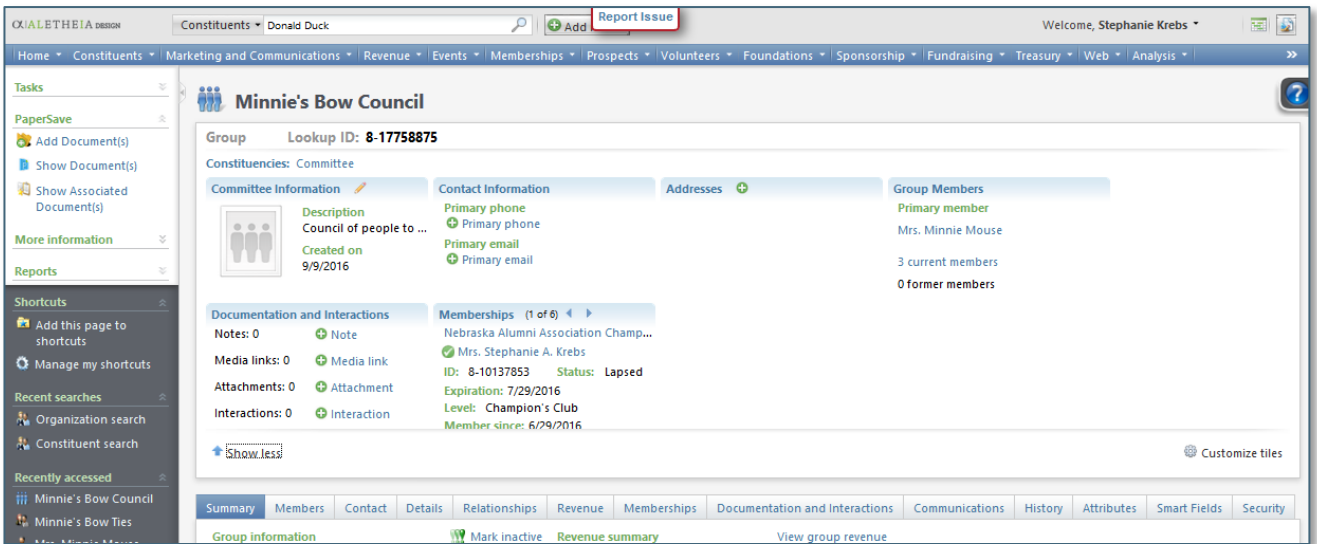
Tab	Second-tier tabs	Description
Summary	N/A	An overview of a committee, including the group members.
Members	N/A	All active members of a committee. Roles for each of the committee members can be identified.

The Household Record

The purpose of a **Household** record is to group married or life partner constituents so that you can view the activities and giving on one record.
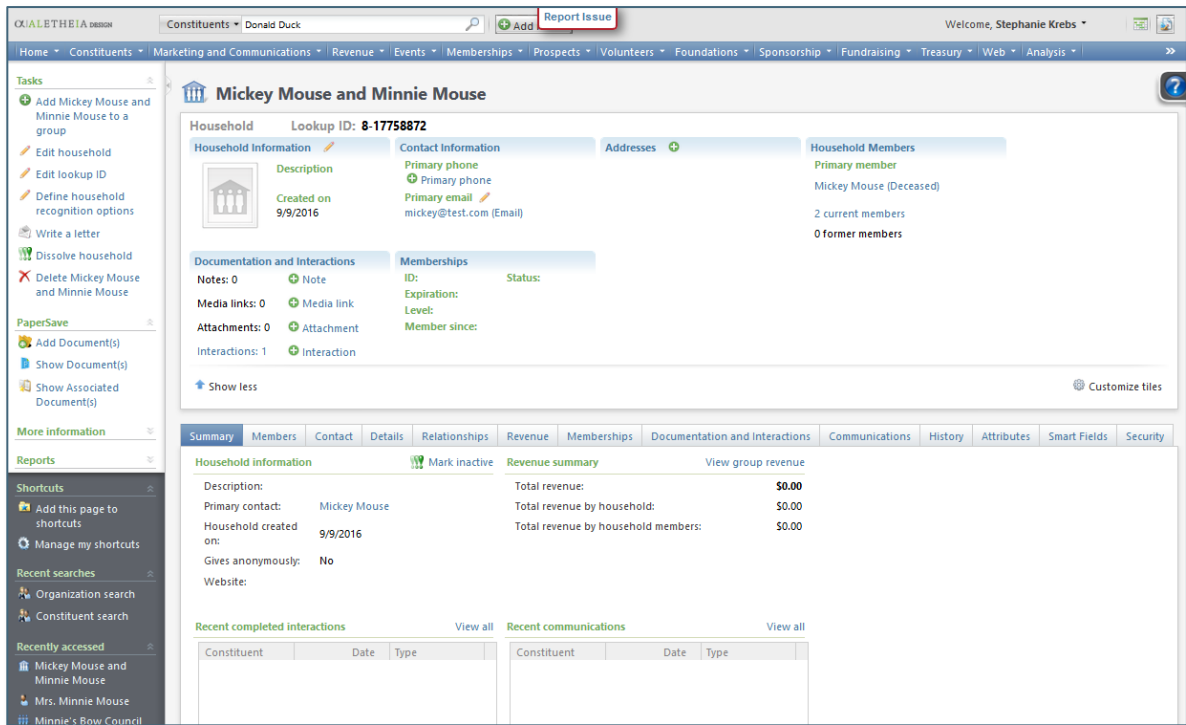
These are some special properties of household groups:

o A constituent can only be an active member of one household, but can be a part of any number of other groups and committees.

o Household and committee records display in constituent searches. This can be controlled under **Advanced search options**.

o Household records are a data aggregate of information and should <u>not</u> have updates applied to them. In *Ali*, a household record always begins with **H-xxxxxx**.

o Correspondence preferences can be set so that mailings are sent one per household, or to individual members of the household.

The **Household** record has the same tabs as the committee record (except for the **Committee** tab.)

The following table identifies the tabs that are specific to a Household record and includes a description of each.

Tab	Second-tier tabs	Description
Summary	N/A	An overview of a household constituent, including the activities and household members.
Members	N/A	All members of the household.
Details	• Details • Constituencies	Data including demographics, alternate lookup IDs, interests and constituencies.
Relationships	• Relationships • Relationship Tree	Individuals and organizations with whom the group is associated.

Dissolving Households

A household can be dissolved when a member leaves and the household does not remain intact, such as in the case of divorce. If one of the spouses passes away, the household will *not* be dissolved unless and until the surviving spouse remarries.

Summary

- **Constituents** are the individuals and organizations who support our advancement efforts. Constituents can be alumni, donors, board members, volunteers, trustees, corporations, businesses, foundations, prospects, or event attendees.

- An individual record is comprised of three main sections: summary tiles at the top of the record, multiple tabs beneath the summary section, and links on the explorer bar.

- Relationships are familial, social, or professional associations with the constituent. **A relation must have its own constituent record in the database.**

- You can view all the memberships for the constituent on the **Memberships** tab of the constituent record.

- Constituencies define the affiliations our constituents have with our organization. A constituent can have multiple constituencies, and they can start, end, and overlap. Constituencies can be used to define these relationships and group similar constituents in queries, mailings, and reports.

- On the **Documentation and Interactions** tab, you can add notes, media links, and attachments and interaction records regarding the constituent.

- **Attributes** are the areas used to store specialized information about a constituent when no field or tab exists for that information. You can query on attributes to gather constituents who share a common characteristic.

- **Organization** constituent records track information about the companies, businesses, and foundations that interact with our organization.

- Committees are a specialized type of group in the program. The **Committee** tab contains several second-tier tabs to help you view information specific to the committee group record.

- Committees show an aggregated view of the members' constituent data.

- The household record is used to group married or life partner constituents into one record. With a household record, you can track the activities of the members of the household and report on the information as a group. Household are dissolved when constituents divorce and the household does not remain intact.

APPENDICES

This Appendix section contains more detailed information than was provided in the Fundamentals JumpStart Manual.

NOTES

COMMUNICATIONS

Organizations often need the ability to communicate with constituents one at a time or with a group of constituents. *Ali* provides the ability to send correspondence to individuals and to a group of constituents.

Lesson Objectives

After you complete this lesson, you will be able to:

o   Understand more about **Write a Letter** functionality in *Ali,* which is used to generate correspondence to one constituent.

o   Be able to navigate to the online **General Correspondence** resource containing information about bulk/mass communication.

Write A Single Letter (from Constituent Record)

When you need the ability to communicate with constituents you can write a letter to a constituent from within the constituent record. This is a method to quickly create a "one-off" letter based on a template that is pre-filled with the constituent's salutation and contact information at an address you select.

Note: This swift process requires *first* that a template be loaded into *Ali*. Those instructions may be found online in the **General Correspondence** documentation.

By using this process, the letter contact info and body of the text is prefilled, the Interaction record is generated automatically in *Ali*, and the file is added as an **Attachment** to the **Interaction**.
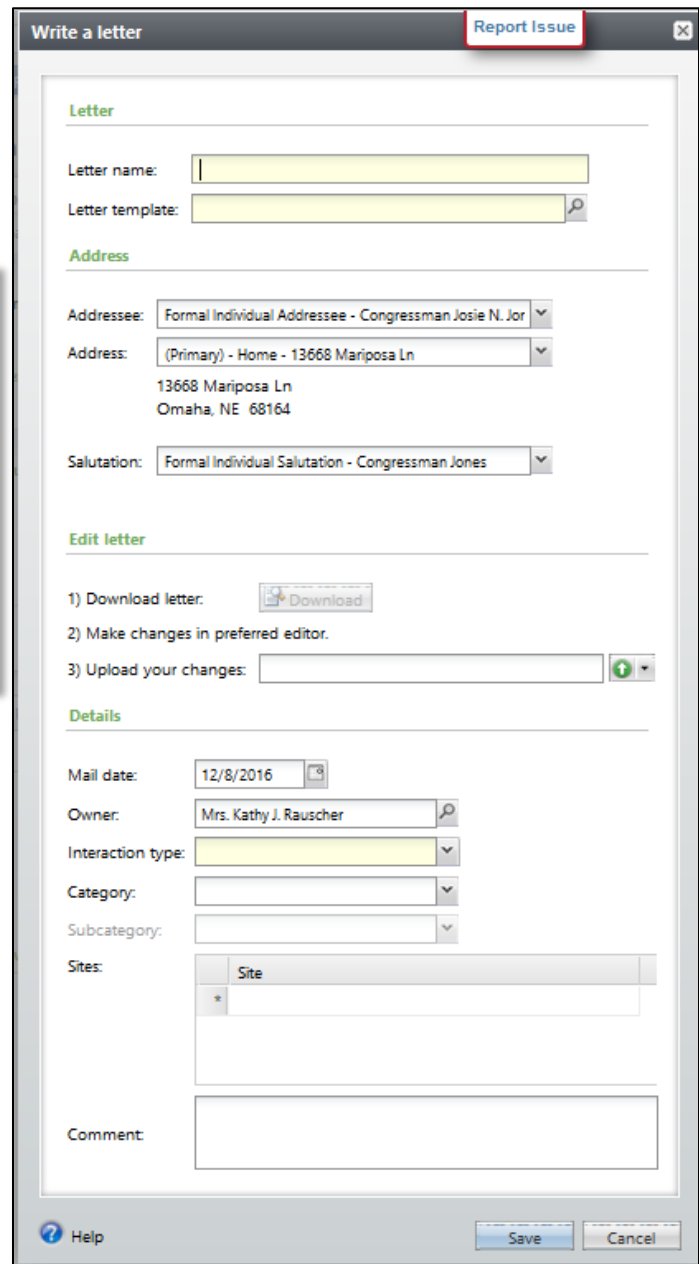
To Write a Letter:

1. Your letter template must be pre-loaded into *Ali.* For instructions please refer to the **General Correspondence** online documentation.

2. Open a constituent record.

3. On the Task bar in the explorer bar at left, click **Write a Letter**.

4. Enter a **Letter Name**.

5. Click the Magnifying Glass to search for the correct **Letter Template**.

    Sample letter templates in *Ali* include:

    - **Fund Agreement Enclosed**
    - **Milestone Thank You Letter**
    - **Pledge Agreement Enclosed**
    - **Scholarship Recipient Thank Yous to Donor**
    - **Basic Letter**

6. Select the Addressee, Address and Salutation you prefer for the letter.

7. In the **Edit Letter** section click **Download**.

    a. Microsoft® Word will open the **Letter Template** with the requested constituent fields filled in.

        - You may need to click **Enable Editing** at the top of the window in Word.
        - By default, the pre-populated template drops into your C:\

    b. Make the necessary additions to the letter.

    c. Save the letter. You **must** change the save location to the network or your computer (i.e., Desktop; IT-approved for use in this limited instance because the file will soon be deleted.)
    Note: The **Letter Name** you enter here will become the **Interaction Summary** in *Ali* later, so please use best practices to identify and name the correspondence appropriately at this step.

    d. Close the letter.

8. Upload the modified letter by clicking the **Green Arrow** icon on line number 3.

9. An Interaction *will automatically be created when you save.*

    a. The **Mail Date** will default to the current date.

    b. The **Owner** will default to the logged in user.

    c. Select **Interaction Type** of **Mail** from the drop-down box.

    d. Select the **Category** and **Subcategory** from the drop-down boxes.

NOTES

     e.   The **Site** will remain blank.

     f.   Enter comments to describe the contents of the letter.

     g.   Click **Save.**

     h.   Delete the copy of the letter that you saved to your computer or network. It is now part of the *Ali* database and should **not** be saved at another location.

10. You will be returned to the **Interaction detail** page.

     a.   The **Letter Name** is loaded to the **Interaction Summary**.

     b.   The **Comments** section is loaded to the **Interaction Comments**.

     c.   The letter can be found on the **Documentation** tab as an **Attachment**.

Mailings to a Group of Recipients

Ali can facilitate mailings to a group of recipients. Learn more about *Ali*'s **General Correspondence** feature in the documentation provided online.

EVENTS

In Ali, an entire functional area is dedicated to viewing and managing events related to fundraising or other advancement activities.

Lesson Objectives

After you complete this lesson, you will be able to:

o   Search for an **Event**.
o   Become familiar with content found on an **Event record**.
o   Learn what to do to create an event in *Ali.*
o   Understand more about the use of **Sites** in *Ali.*

To view information related to events, click on the **Events** functional area in the blue navigation bar.

The **Events** page is a centralized page used to find all information relevant to events. You can view events in a **calendar** or **list** view.

Event Search

In *Ali*, an entire functional area is dedicated to viewing and managing events related to advancement activities.
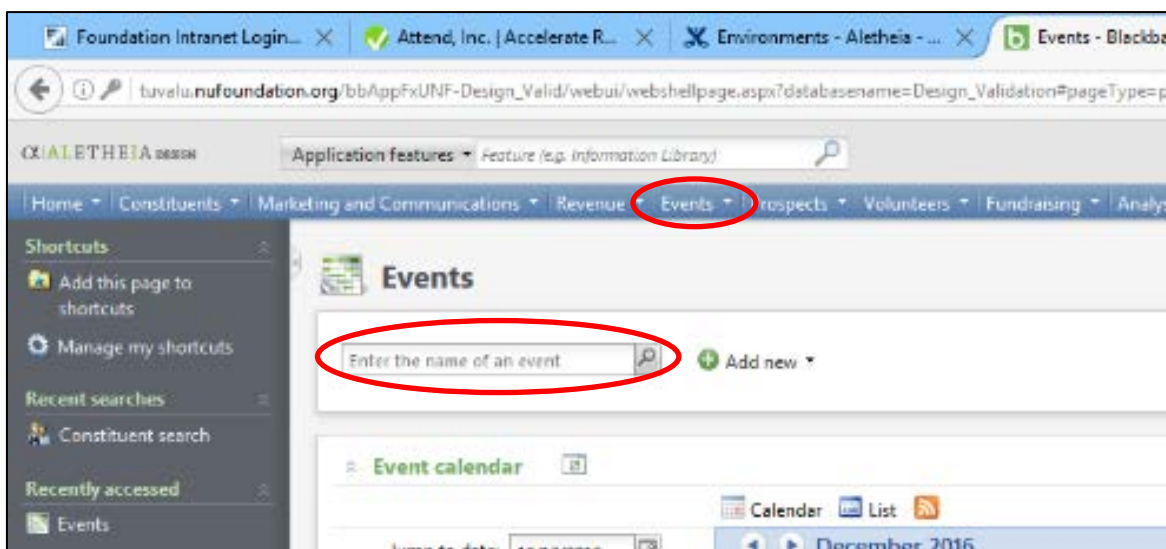
To Search for an Event:

1. To access the Events functional area, click **Events** on the blue navigation bar.

2. Once on the **Events** page, locate the event search bar.

3. Enter an event name or a key word that may be in the event name, in the search field.

   a. Click the **magnifying glass** search icon to pull up the **Advanced Search** box. Here you can search on other event specifics such as location, date, site and category.

      Tip: Do **not** use an * when searching for an event.
      This is the only area of *Ali* where adding an * will *not* work.

   b. A more detailed explanation of the use of **Sites** in *Ali* is provided below.

c. **Advanced Search Box:**

d. **Find** the event you are looking for.

e. **Click** on the event *-OR-* **highlight** the event and click **Select** to open the event.

f. You can also search or view an event in the master calendar on the events page.

- Default viewing is set to view all active events added by any user.

g. Enter filter values to refine your search criteria to view a specific site, date or location for events.

h. If you choose filters, **click Apply Filters**

Tip: be sure to **Reset Filters** before searching for other events.

Event Record

Once you have located your event in *Ali*, and have opened that specific event record, you can view pertinent details pertaining to the event including:

- Date
- Time
- Coordinator
- Location
- Invited guests and responses
- Expenses
- PaperSave documents

To locate all the event information, you can navigate across the tabs of the event record. Each tab contains information specific to that event.

- **Tasks/Coordinators:**
  - **Coordinators:** The event coordinator who is planning the event will be listed on this tab as well as on the main summary page. Multiple people can be listed as coordinators but only one person can be the *primary* coordinator.
  - **Tasks:** Job assignments pertinent to the specific event can be listed here and assigned to coordinators.
- **Registrations:**

- o **Note: This does <u>not</u> display a comprehensive list of invited guests. ONLY guests who have responded in any manner (either to accept or decline) to the invitation will be displayed on the Registrations tab.**
  - ▪ **Tab includes responses of: Accepted, Declined, Cancelled, Attended, or Did Not Attend.**
  - ▪ **Tab does <u>not</u> include guests who were invited but never responded to the invitation.**
- o This tab shows all the individuals who were invited to the event, their RSVP response, any guest they may have attending with them and any other pertinent details regarding their response.
- **Expenses:** All event expenses are recorded here.
- **Options:** Displays registration options (paid and non-paid registration types), preferences (can be utilized for a specific event.)
- **Invitations:** Displays the groups who were invited to the event.
- **Appeals:** Displays any appeals associated with an event (this area is not utilized regularly.)
- **Documentation:** Displays notes, attachments, or links related to the event.
- **Job Occurrences:** Displays volunteer jobs associated with the event.
- **Lodging Options:** Displays lodging information with rooms allocated for the event.
- **Attributes:** Displays useful information about the event. Event attributes supplement the information stored on event records.
  - o On individual guest records within the event, there are also attributes which can be specific to special meal requested (details), un-named guest first and last name (event guest first name/event guest last name), comments, etc.
- **Campaigns:** Displays campaigns and sub-priorities associated with the event.
- **Registrant details:** Details specific to that particular event.

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Constituents Invited to Events

In *Ali*, you can reference a constituent record to see if the person has **responded to an event invitation.** <u>**Note:**</u> The **Events** tab of a constituent record may *<u>not</u>* show all event invitations.

1. Open a constituent record.
2. Click the **Events** tab.

NOTES

Note About Events on a Constituent Record in *Ali:*

The **Events** tab on a constituent record does **not** display all event invitations; rather, it displays *only* the events for which a constituent **responded** to an invitation**.**

The **Events** tab **only shows events for which a constituent has provided an RSVP** regardless of their response either in the affirmative or the negative. This includes respondents who have accepted, declined, cancelled, attended, or did not attend the event.

If you want to determine whether a guest was *invited* to an event, navigate to the constituent's **Communications** tab and limit the communication type to **Event Invitations**.

Creating an Event Record

To create an event, please contact the event coordinator within your organization who has been trained specifically on all aspects of events management in *Ali.*

Note about the use of Sites in *Ali*

Sites provide an ability to manage a complex and multi-tiered hierarchy of the University of Nebraska Foundation and University of Nebraska structure. For example, the University of Nebraska Foundation raises money for the University of Nebraska. The University of Nebraska has four campuses, each campus has multiple colleges, and each college has multiple departments and academic units. While the snapshot at right is not the full site hierarchy, it demonstrates the tiered structure.

University of Nebraska-Lincoln
    UNL Non-Athletic
        UNL Administration
        UNL Architecture
        UNL Arts and Sciences
        UNL Business Administration
            UNL Business Administration Actuarial Science
            UNL Business Administration Bureau of Business Researc...
            UNL Business Administration Economics
            UNL Business Administration Other
            UNL Business Administration Nebraska Center for Entre...
            UNL Business Administration Economics Education
            UNL Business Administration Finance
            UNL Business Administration Marketing
            UNL Business Administration Management
            UNL Business Administration School of Accountancy
            UNL Business Administration Multiple
        UNL Education and Human Sciences
        UNL Engineering

Sites provide the ability to classify and segment certain records to a specific area within the foundation/campus hierarchy. Additionally, by using sites, the organization can easily generate reports at a very detailed level or conduct roll-up reporting. Thus, reporting can be done on a department-by-department level or all departments that fall within a specified college can be rolled up into one summary reporting unit based on user security roles.

Sites are also being used by Marketing and Communications and Events for their segmenting and reporting needs.

Tip: If an error appears stating that **Site** is required, a row in the **Site** space of the interaction may have been added inadvertently. If so, simply left click on the gray box to the left of that row and then press **Delete** on the keyboard. A window will appear allowing the row to be deleted, after which the change may be saved. This error (and remedy) can also occur with **Participants**.

NOTES

MEMBERSHIPS

Lesson Objectives

After you complete this lesson, you will be able to:

- o   Access the **Memberships Programs** page in *Ali*.
- o   Learn how constituents obtain memberships.
- o   Become familiar with the tabs and content found on the **Membership Program** record.
- o   Access a constituent's **Memberships** information.
- o   Navigate to a constituent's membership record.

Membership Programs

A membership program is a way to group constituent members with similar interests. To see a list of our membership programs, click **Memberships** on the blue navigation bar. Functionality within the **Memberships** functional area may vary by university employee user group. Based on *Ali* users' responsibilities, additional training opportunities may be available.

To Access the Memberships Functional Area:

1. On the blue navigation bar, click **Memberships**.

2. The **Membership Programs** page appears.
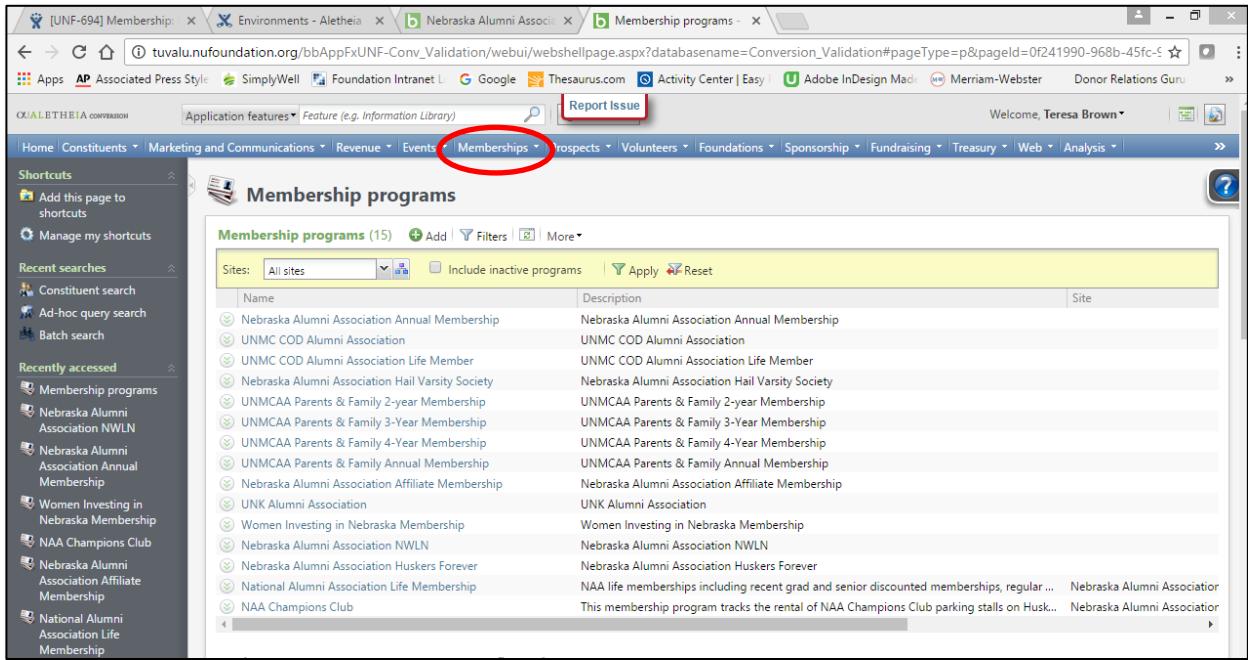
Program Types

There are three different types of memberships:

Program Type	Definition
Annual	For memberships of a specific length with an expiration date.
Recurring (Sustaining)	For memberships with no expiration date as long as a set amount is paid on a recurring basis.
Lifetime	For memberships with no expiration date as long as a set amount is paid in full within a specific timeframe.

NOTES

How Constituents Obtain Memberships

The following table lists the different ways you can define how a constituent obtains a membership:

Program Type	Definition
Dues	• People pay for membership levels with dues • Example: NAA memberships
Contributions	• People are awarded membership levels based on their contributions • Example: WIN memberships

Membership Program Record

To view specific details about a specific membership program, access the membership program's record.

To Access a Membership Program Record:

1. On the blue navigation bar, click **Memberships**.
2. On the **Membership Programs** list, click the name of the membership program to view its details.

The tabs available on the **Membership Program** record vary depending on how the membership program is configured.

Tab	Description
General	Summary information about the program and links to membership tasks, renewal tasks, and reports.
Levels	The details about each membership program level and add-ons for the program. (Annual, single-term programs)
Payment Options/Levels	The details about each membership program level and the payment schedules that are accepted for the program. (Recurring and lifetime programs)
Terms and Levels	The details about each membership program level and the terms for the program. (Annual, multiple-term programs)

Tab	Description
Prices	The prices for each level and the add-ons for the program.
Benefits	The benefits for the program as well as the card format, name format, and whether or not a portion of the dues is considered tax-deductible.
Rules	The rules related to dues-based and contributions-based program levels.
Renewals	A program's renewal information including the terms and when levels expire.

Constituent Memberships

The **Memberships** tab on constituent records enables you to view their membership(s), if any.

To View a Constituent's Memberships:

1. Use a **Constituent search** to access the constituent's record.
2. On the constituent's record, click the **Memberships** tab.
3. The membership programs to which the member belongs are listed in this summary panel.

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Constituent Membership Record

The **Constituent Membership** record enables you to view details about the membership, recent membership activities and transactions, and perform tasks related to the membership.

To View a Constituent's Membership Record:

1. Use a constituent search to access the constituent's record.

2. On the constituent's record, click the **Memberships** tab**.**

3. Click the hyperlink to the constituent's specific membership record.

Congressman Josie N. Jones
NAA Annual Membership - 8-10171214

Individual Annual $50.00 Active	Members Congressman Josie N. Jones	Lookup ID 18542045	11 months until expiration Expiration: 2/28/2018 Member since: 2/7/2017 Renew now	Add interaction Issue member card Other tasks
		Edit members		

Primary member
Congressman Josie N. Jones
13668 Mariposa Ln
Omaha, NE 68164 (Home)
+1 (402) 964-9863 (Home)
josie.jones@gmail.com
Contact information

Additional details
Constituencies:
Donor Board member Prospect
Volunteer Event registrant Member
Prospect manager:
Bradley J. Baker
Communication preferences

Lifetime information
Total membership amount:
$50.00 - 1 transaction
Last renewal:
Never

Other memberships
NAA Annual Membership - Active
NAA Life Membership - Active
Women Investing in Nebraska Membership - Active

Add a membership

Member cards (1) Issue new card | More

Member	Name on card	Expiration date ▲
Congressman Josie N. Jones	Congressman Josie N. Jones	2/28/2018

Comments (0) More

Note	Date	Comments

Add-ons (0) Filters | More

Date	Active	Cancelled	Name	Total

Recent member activities View all 32 | More

Activity	Date	Description
Interaction	9/18/2017	Acknowledgement
Interaction	9/17/2017	Final Agreement Presente...
Interaction	9/13/2017	Fund Agreement Follow-...
Interaction	9/8/2017	Acknowledgement

Benefits and sent items More

Item	Date	Name

Recent membership transactions (1) View complete revenue history | More

Transaction date	Action	Amount	Level	Term	Expiration date	Type	Paid by	Appeal
2/7/2017	Join	$50.00	Individual Annual	1 year(s)	2/28/2018	Check	Congressman Jos...	

Attributes (0) Add | More

Category	Attribute group	Value	Start date	End date	Comment

Documentation (0) Add | Filters | More

Documentation type ▲	Date	Type	Title	Author	Notification

NOTES

PROSPECT MANAGEMENT

The **Prospects** functional area in *Ali* is present only on select constituents the organization has engaged or plans to engage for the purpose of soliciting a major gift.

Based on *Ali* users' responsibilities, additional training opportunities may be available.

Lesson Objectives

After you complete this lesson, you will be able to:

o   Enter an **Interaction.**
o   Locate **Prospect Summary** and **Prospect Manager History** information**.**

Tip: A key resource is the online **Glossary** at www.nufoundation.org/ali. Answers to terminology questions are located there as well as additional training materials.

NOTES

Interactions in *Ali*

Interactions are a permanent record of activity with a constituent. *Ali* users will utilize this system as a primary source of information in their respective responsibilities. Therefore, it is critical to ensure that this system of record contains timely, complete and accurate information. If contact or prospect information is not found in this system, it is presumed that no significant activity has taken place with that constituent. *Ali* users should use discretion in determining what qualifies as pertinent information to include. See the **Broad Framework for Interactions** and **Best Practices** sections for additional guidance. The **Best Practices: Interactions** Supplemental Reference Guide expands on the content below by providing standard examples.

Broad Framework for Interactions

University/NAA/UMCAA Users

- Interactions
  - Will be viewable by Foundation staff and some University *Ali* users
  - Should pass the "newspaper test"
  - Should include basic information about what occurred
  - Should be treated similarly to university correspondence

Best Practices

At minimum, all interactions should:

- include all pertinent information that helps to advance the relationship with the prospect.
- be entered no later than the 5th of each month, although is recommended to be entered within 10 business days of the contact.
- use preferred names and titles, and refrain from the use of acronyms and nicknames (even if they may be well-known at the time of entry).
- not include negative commentary especially regarding sensitive personal information (e.g. messy divorce situations, opinions of personal appearance, etc.). See the Foundation's **Information Disclosure Policy** available online for guidance. If it is not relevant to the prospect's relationship with the university and foundation and/or would embarrass the constituent, do NOT put it in the contact report. If information perceived as embarrassing is nevertheless important, relay it to the appropriate staff verbally.
- if you met with representatives of an organization, include the name and title of the person(s) with whom you met.

NOTES

Interaction Reference Guide

Before proceeding with the next set of instructions, refer to the **Interaction Reference** (also available online). The **Interaction Reference** serves as a comprehensive guide to selections *Ali* users will make in the **Category**, **Subcategory** and **Contact Method** fields of an Interaction.

Once users make a selection in the Category field, the Subcategory selections are limited to relevant options ONLY. Any **Contact Method** may be selected, although the reference document lists the most frequent combinations *Ali* users will choose. Please note that the yellow fields are required fields in *Ali.*

See a sample Interaction form below:

Add an Interaction:

A. Open the constituent record.

B. Click the ⊕**Interaction** from the **Documentation & Interactions** tile.

C. Document the Interaction.

1. **Summary** - Enter a concise summary for the interaction.

2. **Status** - *Select an option from the table.*

3. **Category** - *Select an option from the table.*

4. **Subcategory** - *Select an option from the table.*

5. **Expected date**- date the interaction is expected to occur.

6. **Expected start time** (optional) - *Enter time*

7. **Expected end time** (optional) - *Enter time*

8. **Time zone** (optional) - Select time zone

9. **Owner** - Person who had or was responsible for the interaction. Note: If more than one person was responsible, take the additional steps to add the **Additional Solicitor** attribute, as well.

10. **Contact Method** - *Select an option from the table.*

11. **Event** (optional) - Search for and select an event, if the interaction occurred at an event.

12. **Actual date** - date the interaction ultimately occurred.

13. **Actual start time** (optional) - *Enter time*

14. **Actual end time** (optional) - *Enter time*

15. **Site** (optional) - Select the relevant site(s).

Tip: If choosing to search for the site, using an asterisk preceding the word(s) searched in the **Name** field helps produce better results.

16. **Comments** - Enter relevant detail for the interaction.

17. **Participants** - Select the drop-down arrow and add additional people involved in the contact who are not UNF or University staff. There is also an option to search for constituents.
    Note: *Using this functionality will result in the interaction also being visible on those participants' constituent records.*

D. Click **Save**.

Tip: If an error appears that reads 'Participants' is required, a row in the Participants space of the interaction may have been added inadvertently. If so, simply left click on the gray box to the left of that row and then press 'Delete' on the keyboard. A window will appear allowing the row to be deleted, after which the interaction may be saved. This error (and remedy) can also occur with **Sites**.

Interaction Attributes

If the Interaction requires documentation of an **Additional Fundraiser(s)** or a **Referral**, an attribute may be added.

To Add an Interaction Attribute:

1. Navigate to the Interaction record.
2. Click the **Attributes** tab.
3. Click ⊕**Add.**
4. Select the appropriate **Category**.
5. Select or search for the appropriate **Value**.
6. Click **Save**.

7.   Repeat, if necessary.

The Prospect Tab: Campus Users

The **Prospect** tab on the constituent record contains current and historical Prospect Manager information. The Prospect manager's name is a hyperlink that will direct you to their contact information.
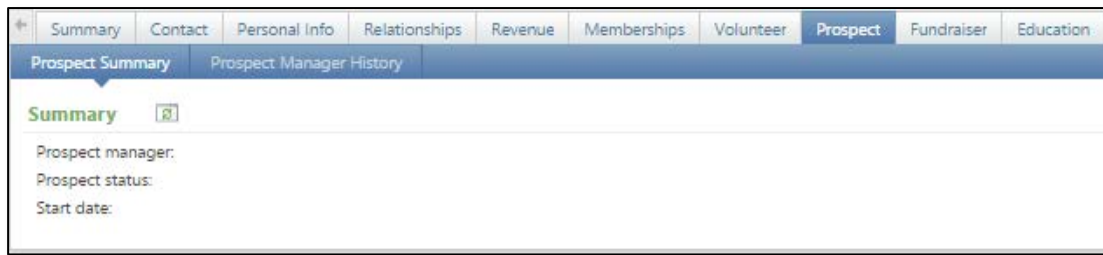
Second-tier Tab	Description
Prospect Summary	Provides an overview of the prospect status, prospect manager and start date.
Prospect Manager History	Displays prior Prospect manager(s) and the dates they served in that capacity.

RECOGNITION PROGRAM(S)

On the **Revenue** tab, for each recognition you can view information about the program. You can also view how long the constituent has been a member of the program.

Lesson Objectives

After you complete this lesson, you will be able to:

- o Identify Giving Society requirements.
- o View a constituent record and determine recognition program(s) to which they belong or have declined membership.

Giving Society Requirements

Giving Society Name	Requirements
Nebraska Circle	$1M or more through outright gifts, pledges or qualifying planned gifts
President's Society	$100,000 to $999,999 in outright giving across the University of Nebraska
UNK/UNL/UNMC/UNO Chancellor's Society	$50,000 or more in outright giving to a particular campus
Burnett Society	Named the foundation in estate plans; no minimum amount
Annual Leadership Society	$1,000 cumulative giving in a calendar year
Dental Dean's Club	$10,000+ in giving to the UNMC College of Dentistry
Nebraska Alumni Association (NAA) 1874 Society	$18,740 in giving to the 1874 Society Fund

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Giving Society Name	Requirements
UNL Library Dean's Club	$5,000+ in giving to the UNL Library
UNMC College of Medicine Edward A. Holyoke Society	Physicians with $100,000+ in giving to the UNMC College of Medicine
UNO CBA Lucas Society	$100,000+ in giving to UNO College of Business
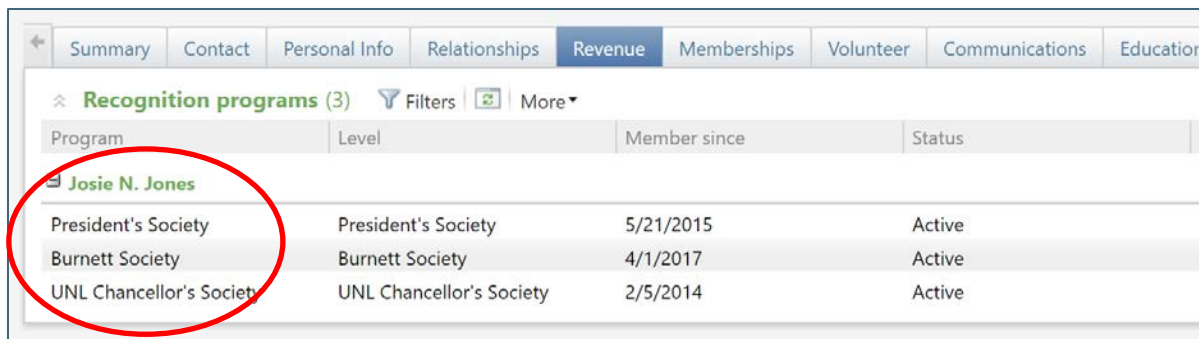
To View Recognition Associated with a Constituent:

1. Open the constituent's record.

2. Click the **Revenue** tab.

3. In the **Recognition programs** frame, click the name of the program to view the details of that program.

SMART QUERIES

Lesson Objectives

After you complete this lesson, you will be able to:

o   Access and create **Smart Queries.**

Queries: An Introduction

Query is a data collection tool used to flag, group, and list selected records from the database that meet certain criteria you define.

The following table describes the two types of queries you can use to extract data:

Type	Information
Ad-hoc	Can include numerous output fields and allow you to browse through specific records based on the information you provide.
Smart	Perform complex calculations that would be difficult to achieve using ad-hoc queries, and are based on templates included in the program.

Smart Queries

Create a Smart Query

The **Smart Query** function lets you easily create a query that is not ad-hoc, but groups records based on specific criteria such as alumni in a city.

NOTES

Constructing an ad-hoc query to group alumni by their geographical area would be challenging; however, using the provided Smart Query definition or template, you enter information in a few fields, and the query is created for you.

When you create Smart Queries, you must first specify the source view template from which the query should be created. This determines the type of records that will be included in it. Then you can define parameters specific to the selected template.

University users will direct Smart Query build requests to their affiliated campus alumni association representative.

To Create a Smart Query:

1. On the navigation bar, click **Analysis**.

1. In the **Information Library** task group, click **Add a Smart Query.**

2. On the **Smart Query Search** window, enter text and/or a **Record Type** to search for a smart query source view template.

    a. Record types you would generally be interested in might include:
       Constituent, Revenue, Recognition, Designation, Fundraising Purpose, etc.

3. On the **Parameters** tab, specify the criteria of the records to include in the query results.

4. On the **Preview results** tab, view the query results and ensure the criteria and output appear as intended.

5. Adjust your parameters as necessary.

6. On the **Set save options** tab, enter a unique name and description to help identify the query and specify the query's properties.

7. Click **Save.** Your instance of the Smart Query has been saved with your specific parameter values.

8. When you are ready to run this Smart Query again click on **Smart Query Search** to find it.
   Note: *When running this Smart Query, please be mindful that you are running a query against the database and it may cause slowness for all database users.*

SPECIAL THANKS

Many individuals helped with the creation of *Ali* resources and reference materials**.**

Thank you to the members of the *Ali* project team for their dedication, expertise, professionalism, and many hours of labor. *Special acknowledgements* go to those who created highly-specialized content beyond the scope of this Fundamentals document; their names are listed at bottom.

The support of all contributors benefiting the mission of the University of Nebraska cannot be overstated.

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Stephanie Krebs
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Additional specialization experts on the *Ali* project team include:
Alicia Haugen, Christina Provost, Joe Kozal, Lane White, and Nadia McDonald Devitt.