

Events Management

TRAINING MANUAL

Includes:

- Event Process
- Events Page
- Event Search
- The Event Record
- Add a New Event
- Set up Multi-Level Events
- Event Invitations
- Event Registration
- Event Seating
- Event Reporting

Version 2.0
Summer 2018

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 – including efforts such as **fundraising, alumni relations, marketing and communication** – the ability to manage the relationships and interactions with alumni, donors and friends. Ali CRM has many features to help users navigate, access and share information, and 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.

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V2.0 – SUMMER 2018

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Version 2.0 updates information about **registration preferences, student registrations, marking events inactive.**

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EVENTS MANAGEMENT

When you create and manage events in the **Events** functional area of Ali, you can track each event's progress, expenses, registration options, invitations, seating, and more. This valuable information helps you determine the financial success of your events.

Lesson Objectives

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

- Describe what constitutes an advancement event and understand the events process.
- Navigate the **Events** page and search for an event.
- Understand the Event record.
- Create a new event.
- Add registration options, preferences, and packages.
- Add an event appeal.
- Add an event coordinator.
- Add event tasks.
- Enter event locations and lodging locations.
- Add an event speaker.
- Add and track event-related expenses.
- Add a multi-level event.
- Understand the **Event Summary** record.
- Create event invitations.
- Add invitees.
- Run the invitation process.
- Download output files.
- Determine whether a constituent was invited and/or responded to an event invitation.
- Navigate the **Registrations** tab.
- Add event registrants and guests.
- Add registrants to multi-level events.
- Navigate the **Registrant** record.
- Add Restrictions.
- Understand event seating.
- Configure a seating layout and assign registrants to seats.
- Run key event reports.
- Track event attendance.
- Inactivate the event after its completion.

What Constitutes an Advancement Event?

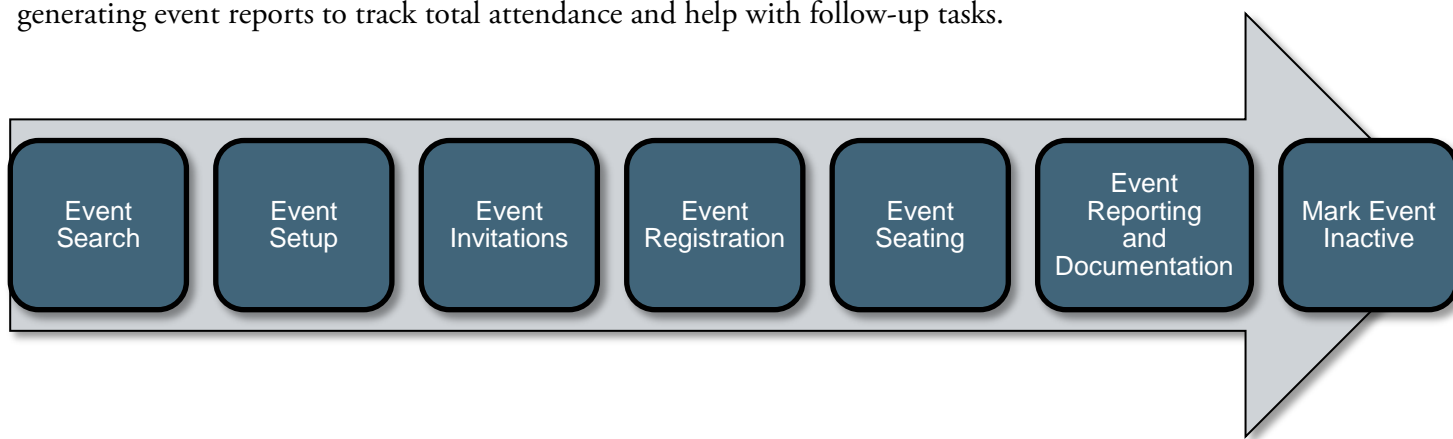
Advancement events at the University of Nebraska play an important role in helping to advance the mission of the university system. Advancement events are characterized as events that engage **donors, alumni, potential donors and community supporters** through gatherings both large and small. These events can be developed and executed by the university (central administration/institutes/campuses/colleges/departments), alumni associations and/or the University of Nebraska Foundation. They often involve senior university leadership, central administration and/or foundation staff.

Ali CRM is intended to manage and help coordinate advancement events, whether planned and executed by university or foundation staff. Advisory board activities involving donors and/or alums, for example, generally would be considered advancement events; a committee meeting, however, is not an event. Ali is not intended to coordinate conferences, team meetings/trainings, nor other non-advancement related events.

If you are unsure whether your event qualifies as an advancement event please contact Annie Bougger, Director of Events, University of Nebraska Foundation at annie.bougger@nufoundation.org or (402) 502-4122.

Event Process

To manage events in Ali, follow the steps outlined in the process diagram. Once you have configured and setup your event, you will be able to upload your invitee list, send invitations and register attendees. You can also configure seating layouts and assign attendees to seats. During the planning process, you can generate RSVP reports and pull lists of those who have not registered. Following your event, you can help determine the success of your event by generating event reports to track total attendance and help with follow-up tasks.

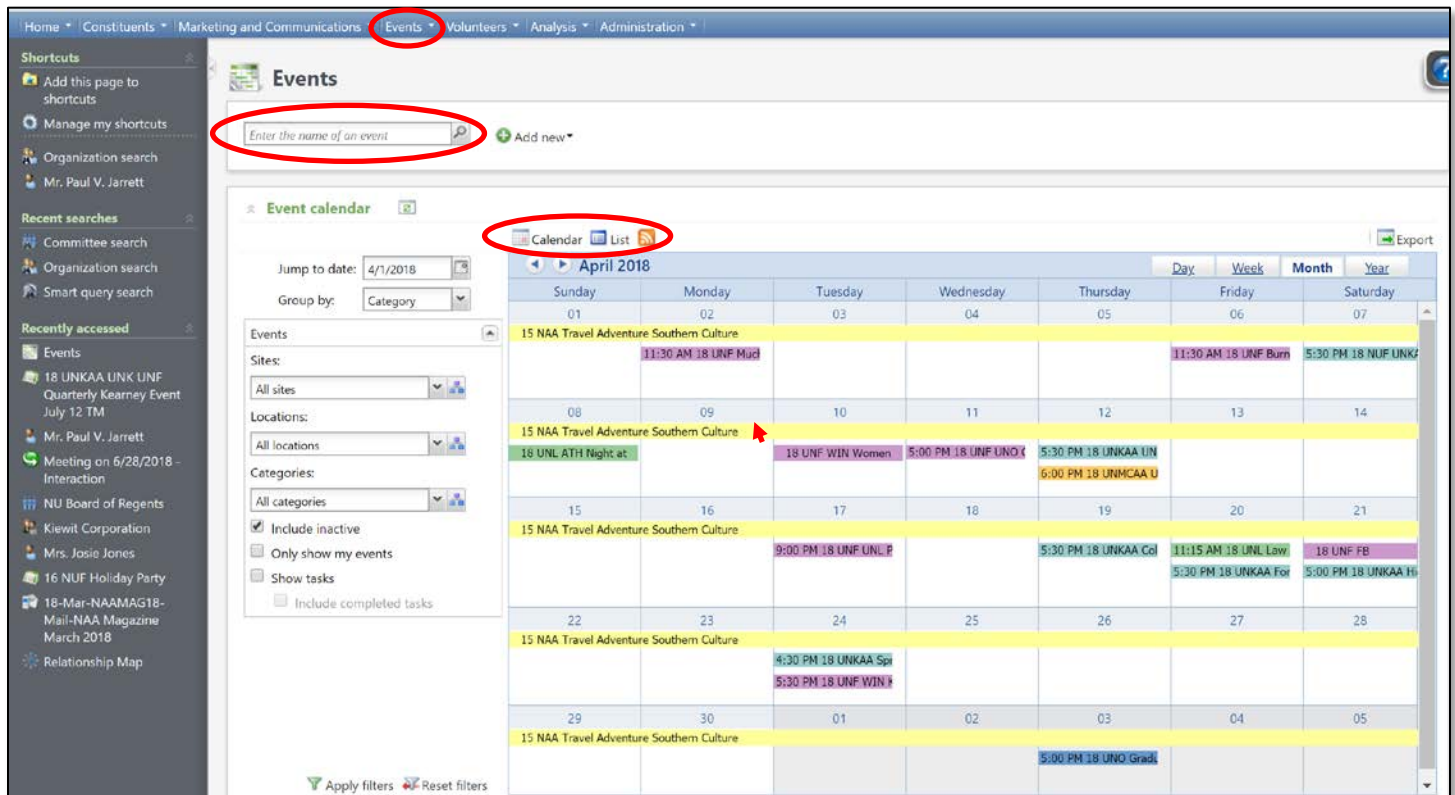


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Events Page

The **Events** page (or functional area) is a centralized page to create, search, and report on your events. You can view your events in calendar or list view.



Pictured above is the master event calendar. Note the pop-up box that appears when resting (but not clicking) on a colorful calendar entry bar.

Event Search

Before you enter a new event into Ali, it is recommended that you first search to see if the event already exists.

To Search for an Event:

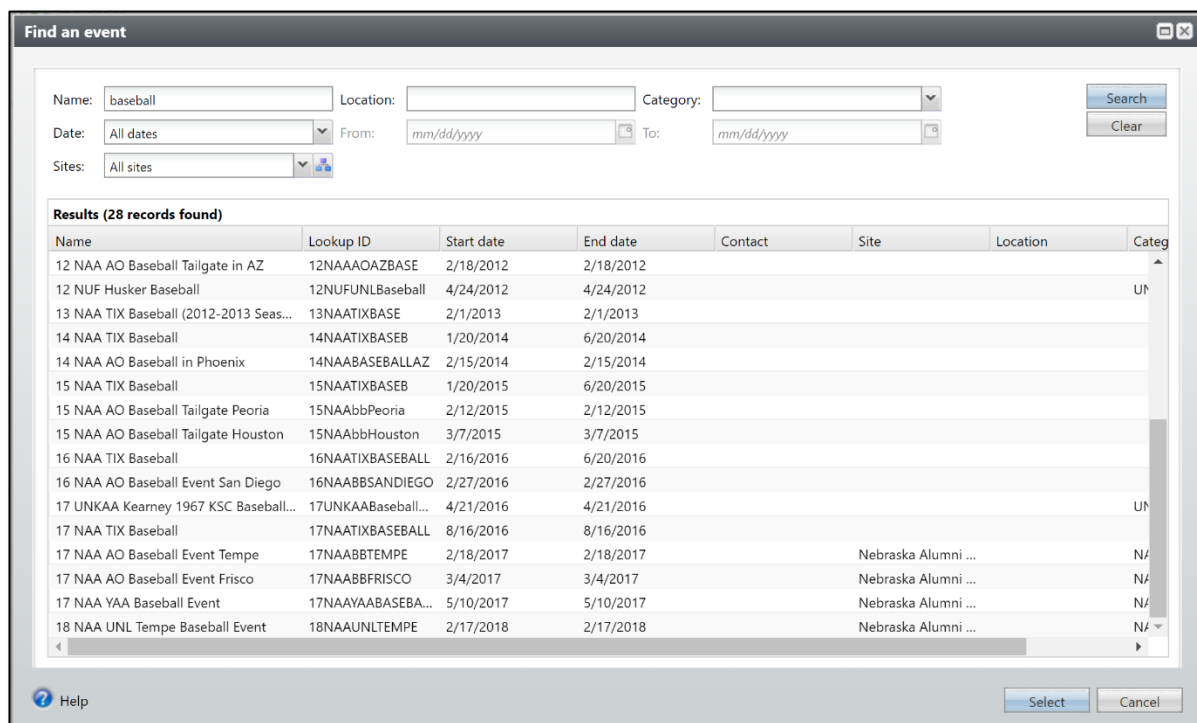
1. On the [blue navigation bar](#), click **Events**.
2. You can search for an event one of two ways, either through the **Find an event** search window or through the **Event calendar**.
 - a. **Find an event** search window:
 - i. Once on the **Events** page, locate the event search bar.

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- ii. *OR* - Click the magnifying glass to pull up the **Find an event** search box. Here it is possible to search on other event specifics such as location, date, site and category.



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



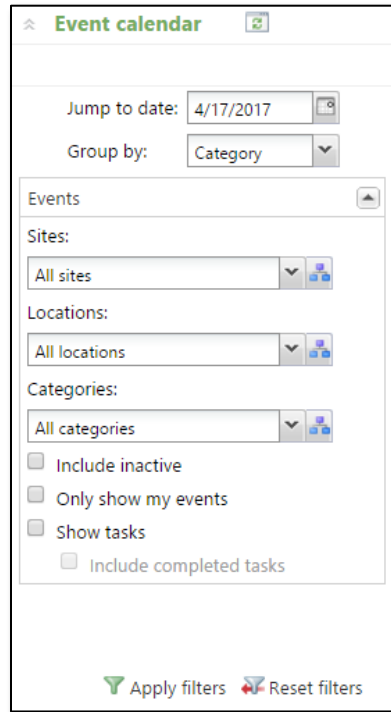
Note: The **Find an event** search window is unique in that adding a leading * (asterisk) does NOT work to produce helpful search results.

- iv. Locate the event.
 - v. Click anywhere in the row of the event or highlight the event and click **Select** to open the event.
- b. **Event Calendar:** You can also search or view an event or its details in the master events calendar on the **Events** page by using the following functionality:
- i. Double-click any colorful calendar bar to open the event record.

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- ii. Rest your mouse pointer over the colorful bar of any event and view the pop-up description. This description provides a basic summary of the event.
- iii. The default view of the master calendar displays all active events added by any user. By using the event calendar filter, you can refine your search criteria to view a specific site, date or location for events. If you choose filters, click **Apply Filters**.



Note: Recall that filters are “sticky” in Ali, so be sure to **Reset Filters** before searching for other events.

If your event is not found using either search method, you will need to [Add a New Event](#).

The Event Record

Each event record contains a summary area and includes several tabs that store information about the event.

An event expenses thermometer and an event capacity thermometer display in the summary area at the top of the event record.

- The event expenses thermometer displays a comparison of the total amount budgeted for expenses and the total amount you have agreed to spend.
- The event capacity thermometer displays a comparison of the total event capacity and the total number of registrants.

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The following table identifies the tabs available on the event record and includes a description of each.

Tab	Description
Tasks/Coordinators	Displays information about the tasks required to prepare for the event and coordinators assigned to the event.
Registrations	Displays constituents invited to the event and indicates which of them have registered for the event.
Speakers	Displays the speakers associated with the event.
Expenses	Displays the expenses budgeted and accrued for the event.
Options	Displays registration options, registration packages, and preferences for the event.
Invitations	Displays information about the invitations for the event.

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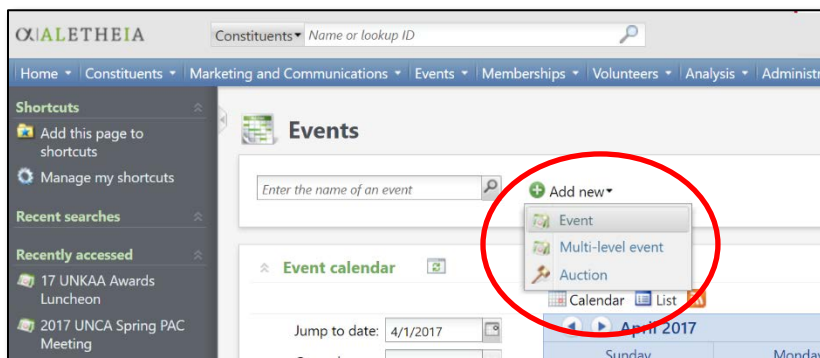
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Tab	Description
Designations	Displays designations associated with the event's fees. Note: Tab will only appear if it is a paid event.
Appeals	Displays the appeals associated with the event. Appeals are used for tracking open rates for mailings or revenue on fundraising events.
Documentation	Displays notes, attachments, or links related to the event.
Job Occurrences	Displays volunteer jobs associated with the event.
Lodging Options	Displays lodging locations with rooms allocated for the event.
Attributes	Displays useful information about the event. Event attributes supplement the information stored on event records that is important to your organization.
Campaigns	Displays campaigns and sub-priorities associated with the event.
Registrant Details	Any restrictions that are on each individual registrant's record will show up here in a master list.

Add a New Event

If your event has not been created, you will need to create one. When adding a new event, enter all the information about the event, including: start and end times and dates, total capacity, description, site and location.

To Add an Event:



1. On the [blue navigation bar](#) where the functional areas are found, click **Events**.
2. On the **Events** page click **Add new** button and select the type of event you want to add.
 - a. **Event** – used for single day event.
 - b. **Multi-Level** – used for events that have multiple events tied into one. (Examples: conferences, multi-day events, etc.). See [Setting up Multi-Level Events](#) for more information.
 - c. **Auctions** – used if you are holding an auction event with fundraising needs at the event.
3. After you have selected the event type, the **Add an event** window will open. Yellow fields in Ali indicate fields that are *required*. Fill in the following details after selecting the type of event you want to add:

A screenshot of the 'Add an event' form window. The form is divided into several sections: 'General' (Name, Description, Category, Sites), 'Details' (Start date, End date, Start time, End time), 'Team fundraising' (Appeal), and 'Location information' (Location, Room/Unit, Capacity, Contact). The 'Name' field is highlighted in yellow, indicating it is a required field. There are also checkboxes for 'Event is an auction', 'Do not show event on calendar', and 'Event allows designations on fees'. A 'Copy options' button is located at the bottom left, and 'Save' and 'Cancel' buttons are at the bottom right.

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- a. **Name:** Formal naming convention must be followed as such:
YEAR | Organization/Campus/College | Name of Event
Example: 17 UNF UNO CBA Scholarship Dinner
Note: The above example includes all organizations involved in planning (University of Nebraska Foundation and UNO CBA). Please note all appropriate designations when creating your event name. Please refer to the [Naming Conventions and Standards Guide online](#) (Training & Reference Materials) for further information.
- b. **Description:** The description shows up on the event calendar located in Ali so it is important you put key information in this space. The following items are **mandatory**:
- i. **What:** One sentence describing the event purpose.
 - ii. **When:** Date including month, day and year.
 - iii. **Time:** Start time. End time, if known. **Tip:** Note time zone in comments.
 - iv. **Event Champion:** Lead from department.
 - v. **Event Coordinator:** Individual planning the event.
 - vi. **Other pertinent details:** Any other details necessary for individuals to read on the calendar. *Example: notable guest speaker, location details, etc.*
- c. **Category:** This is **mandatory**. Select from the dropdown menu the entity where you are employed. For example: all foundation staff should select “UNF” from the dropdown menu.
- d. **Sites:** This is **mandatory**. This field is where you select the applicable area(s) to which this event belongs. This should include your organization at minimum. If you are partnering with another organization, please include them too.
Note: At least one site **MUST** be selected to complete the event setup. The site you select now will be the same site selected when setting up the invitation.
*Example: The event is titled “17 UNF UNO CBA Scholarship Dinner” so the **Sites** for this event would include all three identified Sites:*
- i. Foundation
 - ii. University of Nebraska at Omaha
 - iii. UNO Business Administration
- e. Select **Event is an auction** if applicable.
- f. Select **Do not show event on calendar** if applicable.
Note: Most events should be displayed on master calendar.
- g. Select **Event allows designations on fees** if you want to allow for gifts to be made in conjunction with the registration fee. This is **ONLY** used for events where the participants must pay a registration fee to attend, typically called *paid events*.
- i. Paid events must be cleared and confirmed with the University of Nebraska Foundation Gift Processing Department **and** the UNF Accounting Department at least two weeks prior to your event going live. Contact the UNF Gift Processing

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Department at giftprocessing@nufoundation.org. Contact the UNF Accounting Department at celeste.knapper@nufoundation.org.

- h. Enter the **start** and **end dates** and **times** for the event.
- iv. **Appeal:** If your event will be handing out contribution cards, BREs or any solicitation, please coordinate with the UNF Marketing Communications team to create an **appeal** code. Once you have this code, you can connect it to your event by searching for and adding the appropriate appeal code.
Note: Events that use Blackbaud Internet Services (BBIS) must have an appeal selected. This appeal can be used to track open rates and click-throughs. There is an appeal called **General Email Appeal** that can be used if a specific one is not needed.
- i. **Location:** Search for and select the location where the event takes place.
 - i. Navigate to the **Event Location Search** by clicking on the magnifying glass next to the location field.
 - ii. In the search window type a location name to see if it is in the prepopulated list.
Note: The wildcard search functionality does work in the Event Location Search.
*Example: The location we want to select is UNO Mammel Hall. If you type in *Mammel it will populate any location that has that specific word in its title.*
 - iii. If your location **is** already in the list, select the correct location and click the **Select** button.
Note: Most campus venues and commonly used locations have been prepopulated into Ali with the available meeting spaces and rooms. If you are using a specific meeting space within a listed venue, please select the location the space is located within.

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Event Location Search

Name: Search
 Address: Clear
 City:
 State:
 ZIP/Postal code:

Results (1 record found)

Name	Phone number	Address	Capacity
UNO Mammel Hall			0

Help

- iv. If your location **is not** in the prepopulated list, click the green **Add** button. An **Add a Location** window will open. Populate as many fields as available when adding a new location. At a minimum please populate:
- Name
 - Please list the formal name of the location – for example “Cornhusker Marriott” is the formal name of this hotel located in Lincoln. It would not be entered as just “The Cornhusker” or “Marriott Cornhusker.”
 - Phone Number
 - Country
 - Address
 - City
 - State
 - Zip
- v. **Save** and **Close** when done.

Add a location

General

Name:
 Phone number:
 Capacity:

Address information

Country:
 Address:
 City:
 State:
 ZIP:

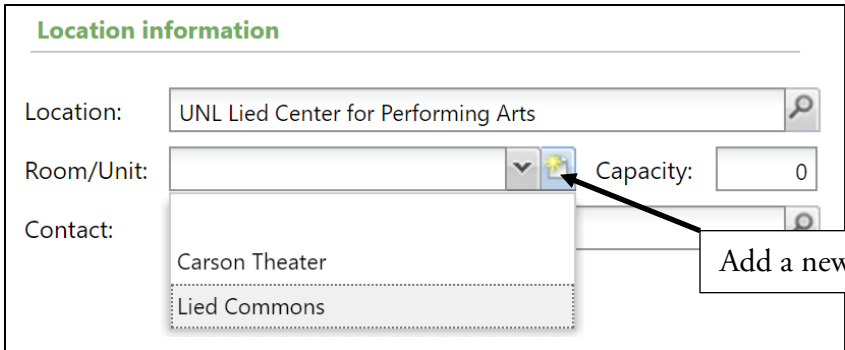
Room/Unit

Room/Unit name	Capacity

Help

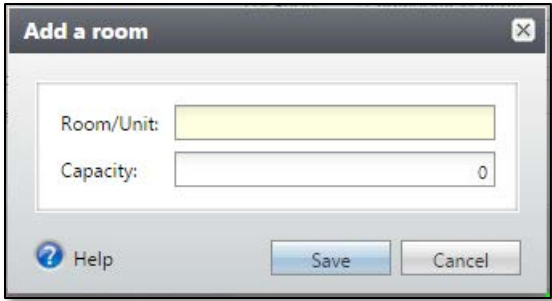
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- j. **Room/Unit:** If your location is using a specific room(s), include this detail by selecting the room/unit from the drop-down options.



The screenshot shows a form titled "Location information". It has three main sections: "Location:", "Room/Unit:", and "Contact:". The "Location:" field contains "UNL Lied Center for Performing Arts". The "Room/Unit:" field is a dropdown menu with a small blue "Add" icon (a plus sign in a square) next to it. A callout box with an arrow points to this icon, containing the text "Add a new Room/Unit icon.". The "Capacity:" field is a text box containing "0". The "Contact:" field has a search icon and a dropdown menu showing "Carson Theater" and "Lied Commons".

If the Room/Unit is not available, click on the **Add** icon (as shown above) and enter the Room/Unit name. Enter the capacity if known. Click **Save**.



The screenshot shows a dialog box titled "Add a room". It has a close button (X) in the top right corner. Inside the dialog, there are two text input fields: "Room/Unit:" and "Capacity:". The "Capacity:" field has "0" entered. At the bottom of the dialog, there are three buttons: "Help" (with a question mark icon), "Save", and "Cancel".

- k. **Capacity:** Enter the total number of attendees the event can accommodate.
Note: ONLY include this if you have tickets or a limited number of seats available for your event.
- l. **Contact:** Enter the contact at the venue with whom you will work. Click on the magnifying glass to search for and select the individual constituent who serves as a contact. This is the person who is the contact you are working with at the location/venue to plan the event. *It is not you nor the person who is setting up the event.*
Note: The contact must be a constituent in Ali to appear in the individual search. If a new constituent needs to be added in Ali please email biographicalrecords@nufoundation.org.
4. Once you have entered all information for the event, click **Save**.

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5. After clicking **Save**, you are navigated to the event record. One final step is needed to complete the initial event setup.

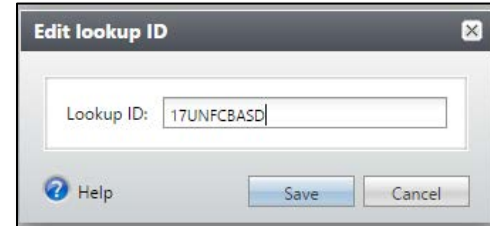
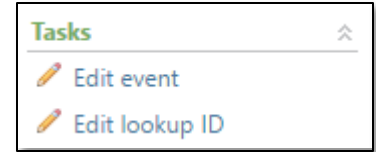
- Under **Tasks** on the explorer bar, click **Edit Lookup ID**.
- A new window will appear with a prepopulated numerical name.
- Replace the numerical value with the Lookup ID naming standard as follows:

Last two digits of the year | Organization you work for/campus/college | first letters of event name.

Example: The event name is “17 UNF UNO CBA Scholarship Dinner” so the Lookup ID is “17UNFCBASD.”

Note: The Lookup ID has no spaces.

- Click **Save**.



Event Registration Setup

An **event registration** type is a category of registration options. When you define registration options for an event, you select a type for each option and indicate the total number of registrations that can be entered for that type. An event registration is required for all events, regardless of whether there is a registration fee or not.

To Add Event Registration Options:

- Find and view your event’s record. This is the “dashboard” for your event.
- Navigate to the **Options** tab.
- Click **Add** next to **Registration options**.
- A new window will open. Yellow fields in Ali indicate fields that are required. Enter the information below:

- **Registration Type:** This is the where you will distinguish the different types of registration options.
 - For free events with no registration fee, always select **Individual**.
 - For events that have registration fees, select the type that best describes the pricing level. You can enter multiple registration options depending on the event.
- **Name:** The name will default to match the registration type. This field is editable so the user can rename to a value that is not available in the Registration Type table. The Name field will be the registration option listed on the event registration page hosted on Blackbaud Internet Solutions (BBIS).
- **Registration Count:** This will prepopulate to the quantity of “1” but can be edited to meet your registration option.
- **Registration Fee:** All events require a registration option even if they are non-paid events. For non-paid events, leave the fee at \$0.00.
 - If funds for events are *not* deposited and managed by the University of Nebraska Foundation, (even if they are a paid event) both the registration fee and the cost must be \$0.00. If any cost is associated this affects the accounting ledger in gift processing.
 - If you have questions regarding paid events, please contact Annie Bougger, Director of Events, University of Nebraska Foundation at annie.bougger@nufoundation.org or (402) 502-4122.

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- **Cost:** This should match the registration fee of \$0.00. This will make the receipt amount \$0.00, which indicates that the fee does not include a donation.
- **Benefits:** If the donor receives a benefit by registering, these need to be added here.
Example: The registrant receives a t-shirt for registering. For more information on benefits, please contact the UNF Gift Processing Department (giftprocessing@unfoundation.org).
 - This only applies if funds are deposited to and managed by the University of Nebraska Foundation.
 - For all other events, there should be no benefit cost listed and the field should remain \$0.00.
- Once all the necessary fields are populated click **Save**.

To Add an Event Registration Package:

For multi-level events, you can use registration packages to combine registration options from each of the supporting events. With registration packages, constituents can register for multiple events in one action.

1. Open the event record of the main event.

The screenshot shows the '17 UNF Spring Game' event record. At the top, there are two progress indicators: 'Event expenses' at 0% of budget and 'Event capacity' at 0% of capacity. Below these are tabs for various event management functions. The 'Options' tab is active, showing two tables:

Registration options (2)					
Registration type	Name	Registration ...	Receipt amo...	Registration co...	Benefits
Adult	Adult	\$25.00	\$0.00		1
Child	Child	\$0.00	\$0.00		1

Registration packages (2)		
Name	Number of eve...	Total amo...
Adult - Game & Tailgate	2	\$35.00
Child - Game & Tailgate	2	\$5.00

2. Select the **Options** tab.
3. On the **Registration packages** action bar, click **Add**.
 - a. Enter a name for the package.
 - b. Select the registration options that apply.
 - c. Click **Save**.

Registration option	Registration fee	Registration count
17 UNF Spring Game		
<input checked="" type="checkbox"/> Adult	\$25.00	1
<input type="checkbox"/> Child	\$0.00	1
17 UNF Spring Game Tailgate		
<input checked="" type="checkbox"/> Adult	\$10.00	1
<input type="checkbox"/> Child	\$5.00	1

Add Registration Preferences

For some events, you may want to capture preference information or add the ability to track and tally responses for *all* registrants. Ideas about how to use this feature include using it to track responses for dinner choices (Beef | Chicken | Fish | Vegetarian); t-shirt sizes (S | M | L | XL); sub-events (Cocktail | Dinner | Both); and parking passes (Lot A-VIP | Lot B), etc. You can set up these registration preferences on the event record, then specify each attendee's preferences as you register them. More than one preference can be set up per event and are event specific. You can copy preferences from another event if needed.

Note: Adding registration preferences using the above method adds the ability to track preferences for *all* registrants for this event. However, if you need to add or edit a **permanent constituent preference**, such as an accommodation requirement (Hearing Impaired | Service Animal, etc.) or dietary restriction (standard list), for *one constituent*, open the constituent record and input the information either on the **Personal Info** tab > **Personal** sub-tab > **Event Restrictions** section, *or* on the **Attributes** tab (Dietary Restriction-Other, then enter custom restriction.)

To Add a Registration Preference:

1. Open the event record.

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- Navigate to the **Options** tab.

18 UNF WIN Kearney Symphony Concert

Start date: 4/24/2018 - 5:30 PM Status: ✔ Active 100%
 End date: 4/24/2018 - 7:30 PM ✔ Active 50%
 Site: University of Nebraska Foundation Lookup ID: 8-10002792 0%
 Location: UNK Fine Arts Building 2506 12th Ave Kearney, NE 68849 0%

Room/Unit:
 Contact:
 Coordinator:
 Category: UNF

Event expenses Expense budget: \$0.00 Agreed expenses: \$0.00 Amount paid: \$0.00 0% of budget

Event capacity Event capacity: 0 Will attend: 0 Will not attend: 0 0% of capacity

← Registrations Tasks/Coordinators **Options** Invitations Expenses Attributes Speakers Appeals Documentation Job C

Registration options (0) + Add + Copy from More ▾

Registration type	Name	Registration fee	Receipt amount
-------------------	------	------------------	----------------

Preferences (0) + Add + Copy from More ▾

Name	Options
------	---------

- On the **Preferences** action bar, click **Add**.
- Enter a name for the preference and enter the options available. Preferences can serve as a way for registrants to self-select options for an event (such as a meal) or allow the event coordinator to track options by the registrant. The options are free text and are customizable.

Example: To track meal options, create a preference and enter the name **Dinner Choices**. Type the options of Chicken, Beef, Fish, and Vegetarian. Once added, the Preference will appear when adding a registrant to the event. For more information on adding a registrant, please see the [Event Registration section](#).

Add a preference

Name: Dinner Choices

Options

- Chicken
- Beef
- Fish
- Vegetarian

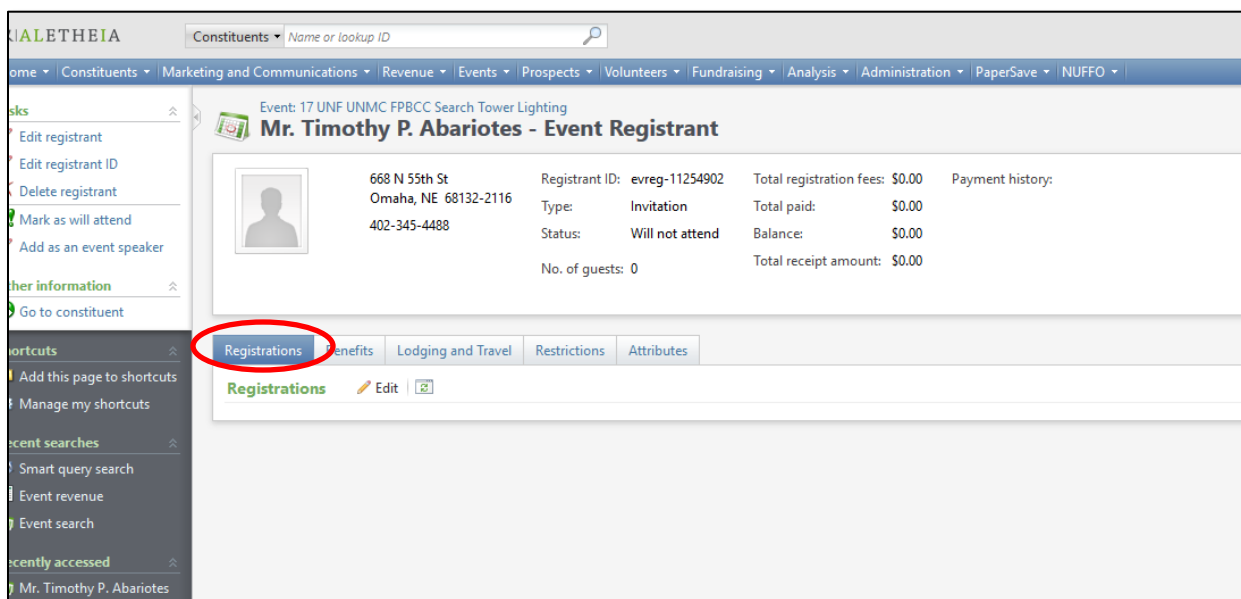
* _____

Help Save Cancel

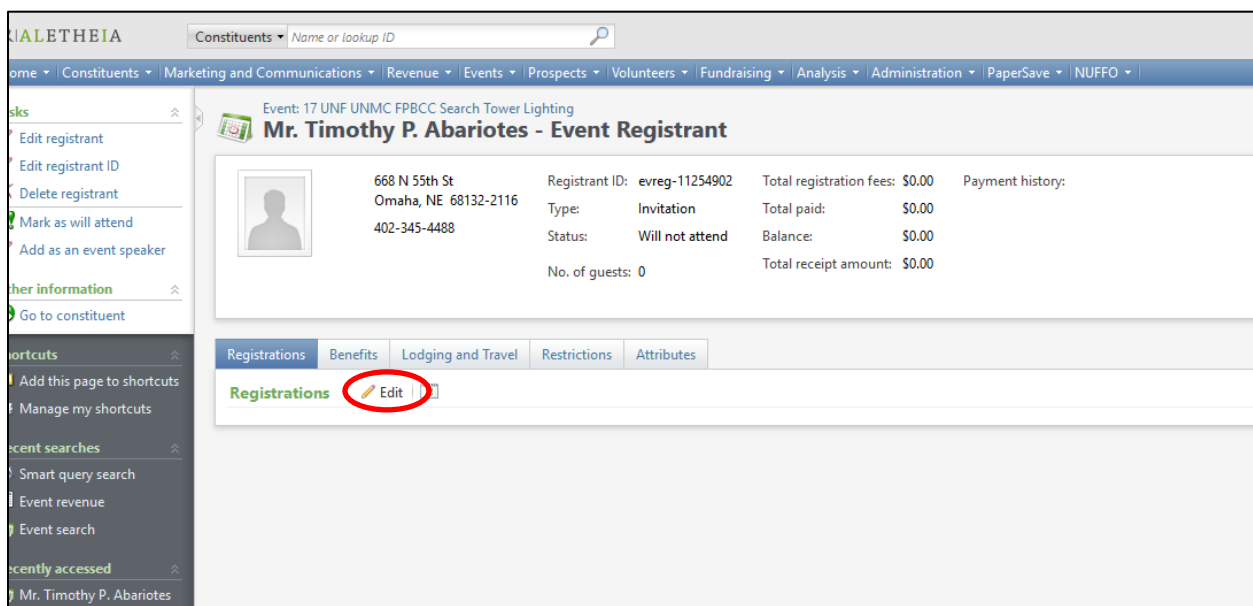
- Once you have named your **Preference** and added the necessary options click **Save**.

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- Once you have the preferences setup you can then utilize them to track meal choices (not dietary requirements) for events. To do so you would open an individual registrants event record and click on the **Registrations** tab.



- Then click the word **Edit** and a new window will open



- In the new window you will select the drop down options available under dinner options

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Registrant ID: evreg-11254902 Total registration fees: \$0.00 Payment history:

Edit registration

Registrant: Mr. Timothy P. Abariotes Total registration fees: \$0.00
Receipt amount: \$0.00

Packages **Single Events**

17 UNF UNMC FPBCC Search Tower Lighting - Single Events
17 UNF UNMC FPBCC Search Tower Lighting (Wednesday, June 14, 2017 7:00 PM - 9:00 PM)

Registration option	Registration fee	Registrants Benefits
Individual	\$0.00	1

Registration option	Registrant	Dinner Options	Waive registration fee
Individual	Mr. Timothy P. Abariotes	<div style="border: 1px solid gray; padding: 2px;"> Dinner Options [v] </div> <ul style="list-style-type: none"> Beef Chicken Fish Other Vegetarian 	<input type="checkbox"/>
*			<input type="checkbox"/>

Help Save Cancel

9. If there are any guests listed under the main registrant you can also make their registration preferences there as well.
10. Click **Save** once you are done.

Add Event Coordinators

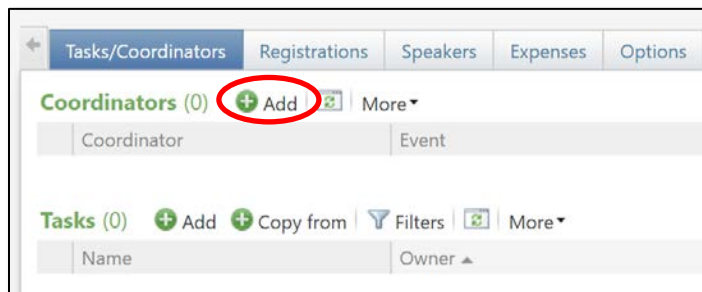
On the **Tasks/Coordinators** tab of an event page, you can view and manage the foundation or university coordinators associated with the event. Event coordinators are the staff members or committees that oversee an event.

To Add an Event Coordinator:

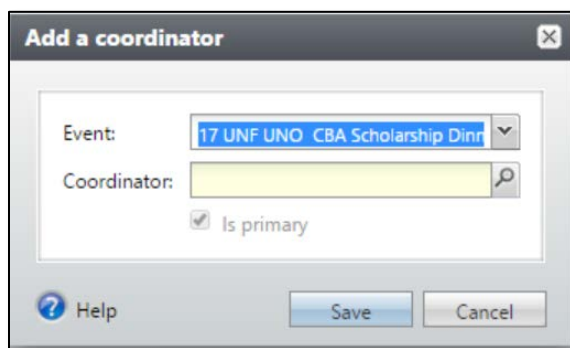
1. Open the event record.

EVENTS MANAGEMENT

2. Select the **Tasks/Coordinators** tab.



3. On the **Coordinators** section, click **Add**.
4. In the **Event** field, select **Event** to add a coordinator (it should be prepopulated if you opened it up from the specific event).



5. In the **Coordinator** field, search for the coordinator by clicking on the magnifying glass. Use the **Event Coordinator Search** to select the constituent or committee to assign as a coordinator. This search window functions like a constituent search except it only includes those with a constituency code of Staff.

Note: Coordinators must be constituents in Ali.

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The screenshot shows a search interface for event coordinators. It includes text boxes for name, address, city, state, and ZIP, as well as dropdown menus for sites and constituent type. A search button and a clear button are present. Below the search fields is a checkbox for 'Match all criteria exactly' and a link to 'Show advanced search options'. At the bottom, there is a 'Results' table with columns for 'Lookup ID', 'Name', 'Constituent type', 'Address', 'City', 'State', and 'ZIP'. A 'Help' icon and 'Select' and 'Cancel' buttons are also visible.

6. Select the **Is primary** box if this is the primary coordinator of the event.
7. Click **Save**.
8. Continue adding any other necessary coordinators. This is preferred if a committee is involved.

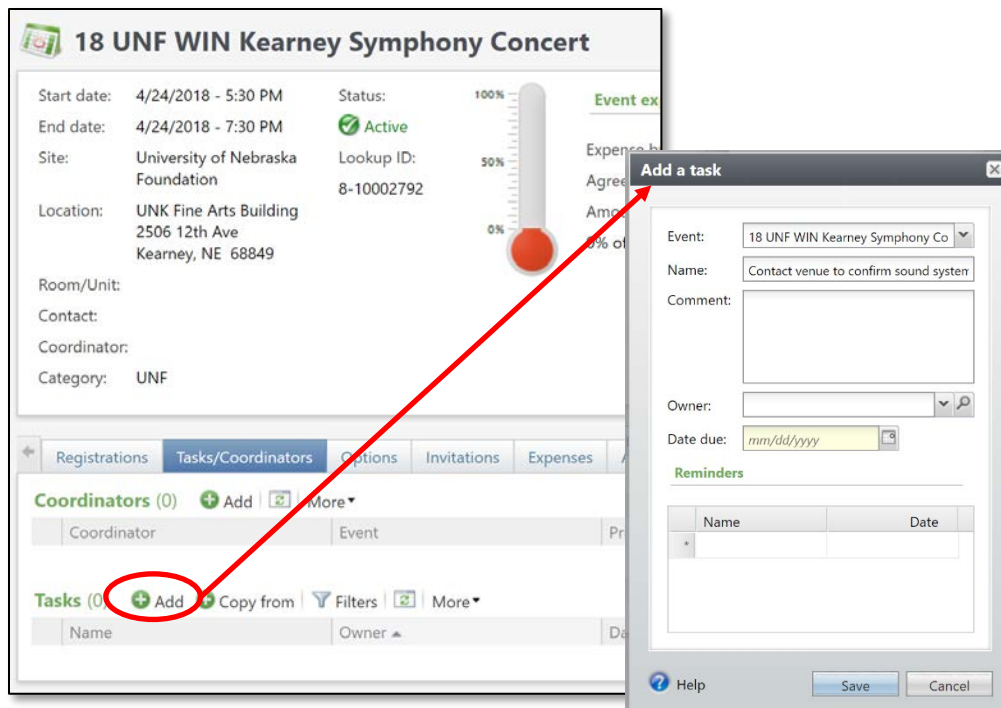
Add Event Tasks

An event task is a job that must be completed in preparation for an event and can be assigned to specific planners. This feature is helpful in keeping a to-do list if multiple people are working on an event.

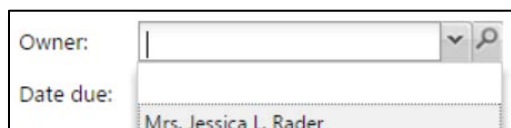
To Add an Event Task:

1. Open the event record.
2. Select the **Task/Coordinators** tab.
3. On the **Tasks** tab, click **Add**.

EVENTS MANAGEMENT



4. Complete the fields and options on the **Add a task** window:
 - a. **Name:** enter a unique name for the task.
 - b. **Comment:** enter any instruction or explanation for the task.
 - c. **Owner:** search for the event coordinator, staff member, or committee assigned to the task.
 - i. The drop-down arrow shows the event coordinators already added to the event for easy assignment of tasks.
 - ii. The magnifying glass allows you to search all individual constituent records in Ali.
 - d. **Date due:** select the date by which the owner must complete the task.



- e. Click **Save**.

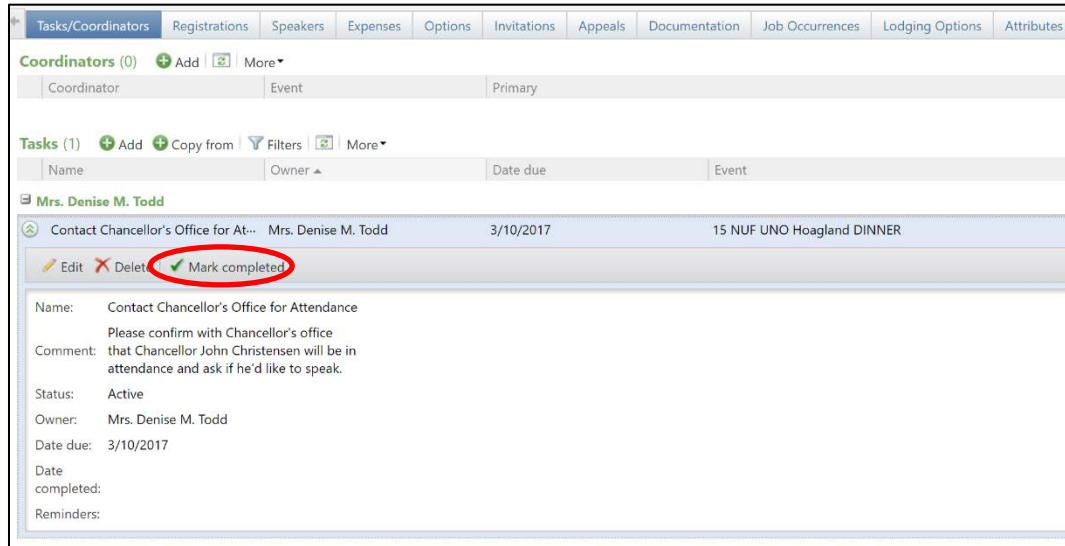
To Mark a Task Complete:

1. Open the event record.
2. Select the **Task/Coordinators** tab.

NOTES

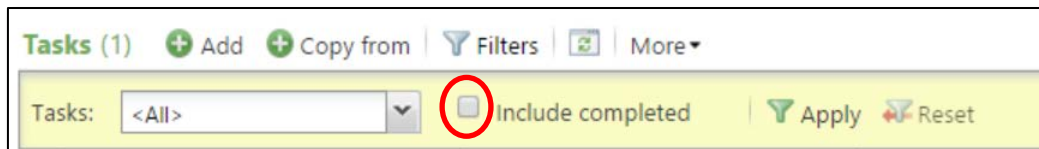
[Jump to Table of Contents](#)

- Click the expand icon chevron to the left of the task.
- In the frame that appears below the task, click **Mark completed**.



- When prompted, click **Yes**.

Note: Check your filter and select **Include Completed** if desired.



Add Lodging Locations

On the **Lodging Locations** tab, you can add and manage the facilities where your registrants stay when they travel to attend your event.

To Add a Lodging Location:

- Click the **Lodging Options** tab of the event record.

EVENTS MANAGEMENT

15 NUF UNO Hoagland DINNER

Event date: 4/15/2015 Status: ✘ Inactive

Site: Lookup ID: 15NUFUNOHD

Location:

Room/Unit:

Contact:

Coordinator:

Category:

Event expenses **Event capacity**

Expense budget: \$0.00 Event capacity: 0

Agreed expenses: \$0.00 Will attend: 6

Amount paid: \$0.00 Will not attend: 0

0% of budget 0% of capacity

Tasks/Coordinators Registrations Speakers Expenses Options Invitations Appeals Documentation Job Occurrences **Lodging Options**

Lodging options (0) + Add More ▾

Lodging location	Allocated	Assigned	Remaining	Over-assig
------------------	-----------	----------	-----------	------------

2. On the action bar, click **Add**.
3. Populate the following:
 - a. In the **Lodging location** field, search for and select the lodging location with rooms allocated for the event.

Add a lodging option

Event: 15 NUF UNO Hoagland DINNER

Lodging location:

Room types:

Type	Sleeps	Allocated

Help Save Cancel

NOTES

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- b. Search for your **Lodging Location** by clicking on the magnifying glass.

- c. If your lodging option is not prepopulated, click **Add**.

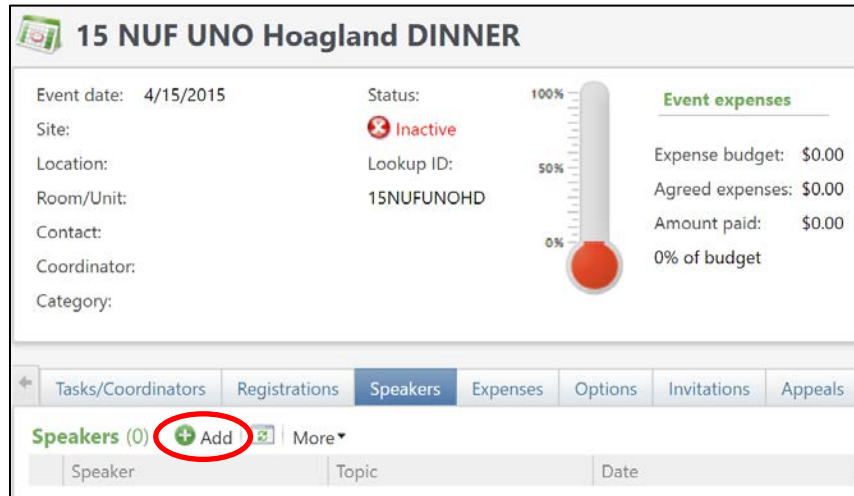
- d. In the **Add a lodging location** window:
- i. Enter the lodging name and phone number for the location.
Note: The lodging name should be the formal name of the organization.
 - ii. Select the constituent who acts as a contact at the location.
 - iii. If your organization negotiates a discounted rate, enter the discount code.
 - iv. Enter any additional comments about the location.
 - v. Enter address information for the location.
 - vi. Enter the room types available at the location
- e. Click **Save**.

Add Event Speakers

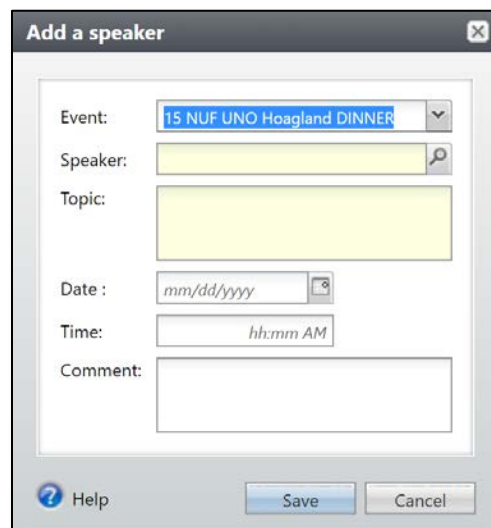
On the **Speakers** tab of an event record, you can add and manage event speakers.

To Add Event Speakers:

1. Click the **Speakers** tab on the event record.
2. On the action bar, click **Add**.



The screenshot shows the event record for "15 NUF UNO Hoagland DINNER". The event date is 4/15/2015, and the status is "Inactive". The lookup ID is 15NUFUNOHD. The event expenses section shows an expense budget of \$0.00, agreed expenses of \$0.00, and amount paid of \$0.00, resulting in 0% of budget. The "Speakers" tab is selected in the navigation bar. The "Add" button in the action bar is circled in red.



The "Add a speaker" dialog box contains the following fields: "Event" (dropdown menu with "15 NUF UNO Hoagland DINNER" selected), "Speaker" (text input field with a search icon), "Topic" (text input field), "Date" (text input field with "mm/dd/yyyy" placeholder and a calendar icon), "Time" (text input field with "hh:mm AM" placeholder), and "Comment" (text input field). At the bottom, there are "Help", "Save", and "Cancel" buttons.

- a. **Speaker:** Search for and select the constituent who will speak at the event.

Note: The speaker must have a constituent record.

NOTES

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- b. **Topic:** Enter information about the topic on which the speaker will speak.
 - c. **Date and time:** Details on when the speaker will speak.
 - d. **Comment:** Add any additional comments about the speaker.
3. Click **Save**.

Add/Track Event Budget & Expenses

An event expense is a debt your organization incurs or plans to incur when you host an event. To accurately track expenses, an **Overall expense** line will be added to track the overall budgeted amount and separate expense lines will be added for all planned payments.

To Add/Track the Overall Event Budget:

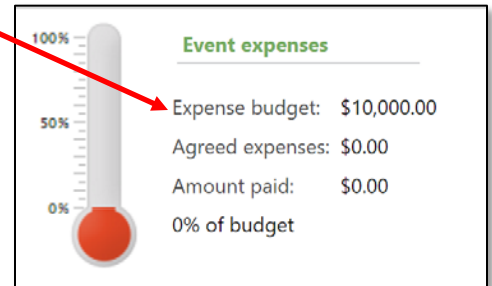
1. Click the **Expenses** tab on the event record.
2. On the action bar, click **Add**.
3. Complete the fields and options on the **Add an expense** window.
 - a. **Type:** Select **Overall**.
 - b. **Vendor:** Leave blank.
 - c. **Budgeted:** Add the event's overall budget – only do this once. Do *not* add budgeted amount onto each individual expense.
 - d. **Agreed Amount:** Leave at \$0.00.
 - e. **Amount Paid:** Leave at \$0.00.
 - f. **Comment:** List any other details needed.
4. Click **Save**.
 - a. This will be reflected in the event expenses thermometer display in the summary area at the top of the event record.

EVENTS MANAGEMENT

Expenses (1) + Add + Copy from More

Type	Vendor	Budgeted amount	Agreed amount	Amount paid	Date due
<None>					
Overall		\$10,000.00	\$0.00	\$0.00	

Edit Delete



To Add/Track Event Expenses:

1. Click the **Expenses** tab on the event record.
2. On the action bar, click **Add**.

18 UNF UNL Health Center UNMC Nursing CEREMONY Event hierarchy

<p>Event date: 7/10/2018</p> <p>Site: University of Nebraska Foundation</p> <p>Location:</p> <p>Room/Unit:</p> <p>Contact:</p> <p>Coordinator: Mrs. Denise M. Todd</p> <p>Category: UNF</p>	<p>Status: Active</p> <p>Lookup ID: 8-10003018</p>	<p>Event expenses</p> <p>Expense budget: \$0.00</p> <p>Agreed expenses: \$0.00</p> <p>Amount paid: \$0.00</p> <p>0% of budget</p>	<p>Event capacity</p> <p>Event capacity: 0</p> <p>Will attend: 77</p> <p>Will not attend: 4</p> <p>0% of capacity</p>
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Registrations Tasks/Coordinators Documentation Invitations **Expenses** Options Speakers Appeals Job Occurrences

Expenses (0) + Add + Copy from More

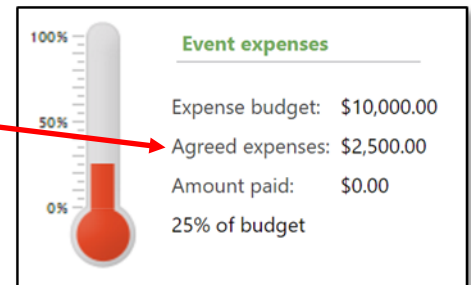
Type	Vendor	Budgeted amo...	Agreed amount	Amount paid	Date due	Date paid
------	--------	-----------------	---------------	-------------	----------	-----------

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3. Complete the fields and options on the **Add an expense** window.

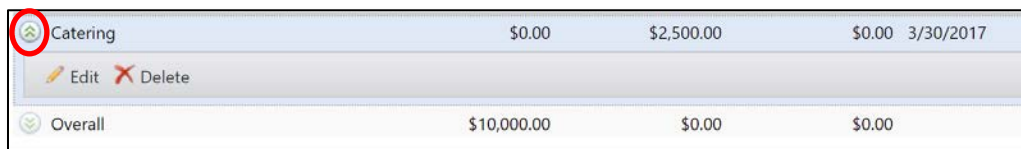
- Type:** Select the type of expense.
- Vendor:** Leave blank. Most vendors will likely *not* be constituents in Ali and that is the only way to complete this field. All vendor names and details can be listed in the **Comments Field**.
- Budgeted:** Leave blank (see [To Add/Track Event Expenses and Budget](#) below).
- Agreed Amount:** The total amount you budgeted for the expense item. This will be reflected in the event expenses thermometer display in the summary area at the top of the event record.



- Amount Paid:** The total amount paid and the payment date. This amount would include gratuity.
 - Comment:** List the name of the vendor and any other details needed.
4. Click **Save**.

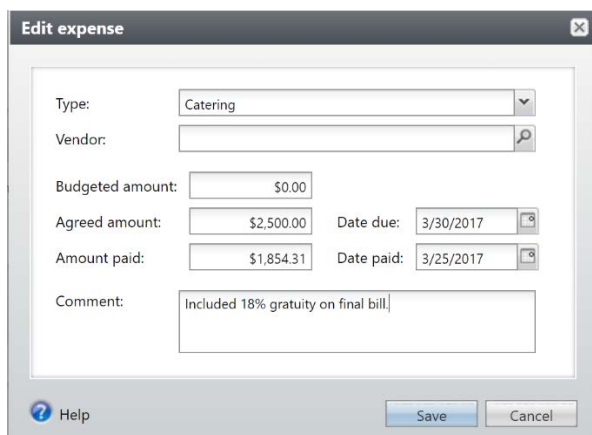
To Add/Track Paid Expenses:

1. To track a bill as paid, click the chevron double-down arrow next to the expense item to expand the line:



Catering	\$0.00	\$2,500.00	\$0.00	3/30/2017
Edit Delete				
Overall	\$10,000.00	\$0.00	\$0.00	

2. Click **Edit**.
3. The **Edit expense** window will open.



Edit expense

Type: Catering

Vendor:

Budgeted amount: \$0.00

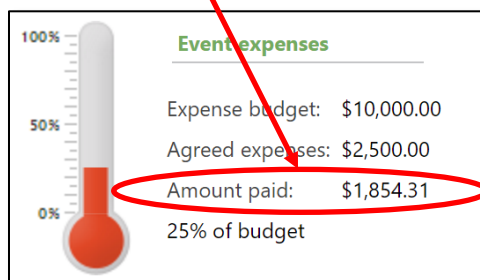
Agreed amount: \$2,500.00 Date due: 3/30/2017

Amount paid: \$1,854.31 Date paid: 3/25/2017

Comment: Included 18% gratuity on final bill

Help Save Cancel

4. Track the final amount in **Amount paid** and add in any comments needed.
5. Click **Save**.
 - a. This will be reflected in the event expenses thermometer display in the event summary area under **Amount paid**.



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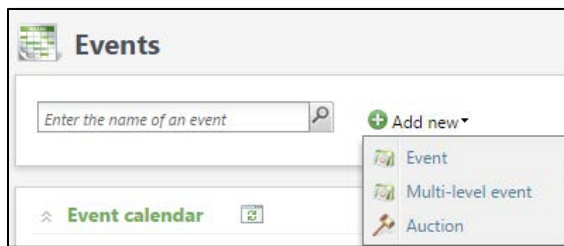
Setting up Multi-Level Events

Some events are tiered and have multiple levels. You can set up each event in a group for multi-level events.

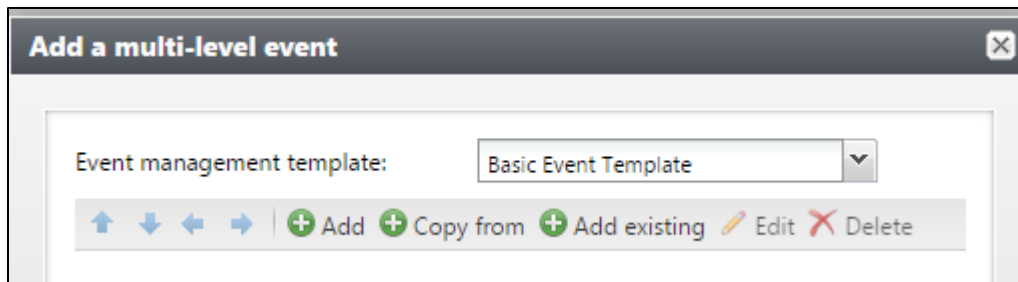
Multi-Level events utilize templates. The templates determine whether events at different levels or tiers can have items such as registrants, speakers, lodging options, and more. This feature is helpful if you are planning a conference or event with multiple days, speakers or sessions.

To Setup Multi-Level Events:

1. On the [blue navigation bar](#), click **Events**.
2. On the events page, click **Add new** and select **Multi-level event** from the drop-down menu.



3. The **Add multi-level event** window will open.



- a. Select the **Event management template** you would like to use for this specific multi-level event. The **Basic Event Template** will be most commonly used.
- b. Begin adding events to the template.

Note: The first event you add will be the main event.

 - i. Click **Add** if you are not using an existing event. Set up your new multi-level event following the same instructions for [Add an Event](#).

EVENTS MANAGEMENT

Add an event

General

Name:

Description:

Category:

Sites:

Site
*

Event is an auction

Do not show on event calendar

Event allows designations on fees

Details

Start date:

Start time:

End date:

End time:

Team fundraising

Appeal:

Location information

Location:

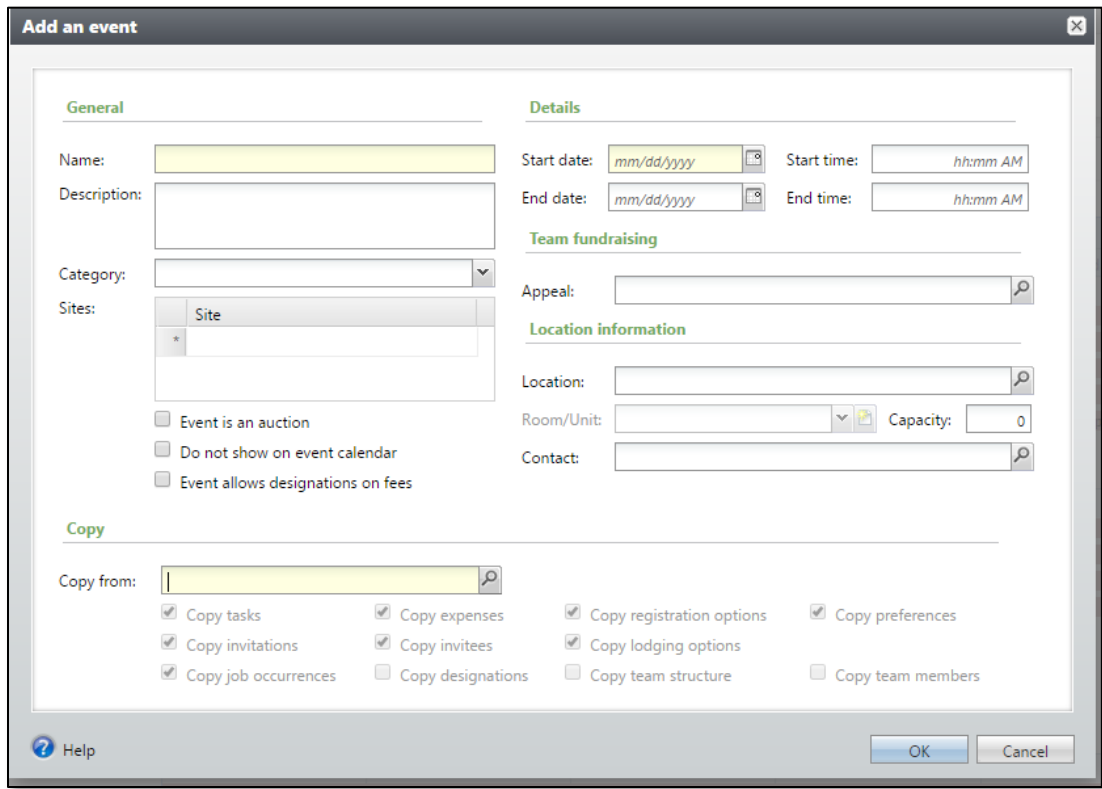
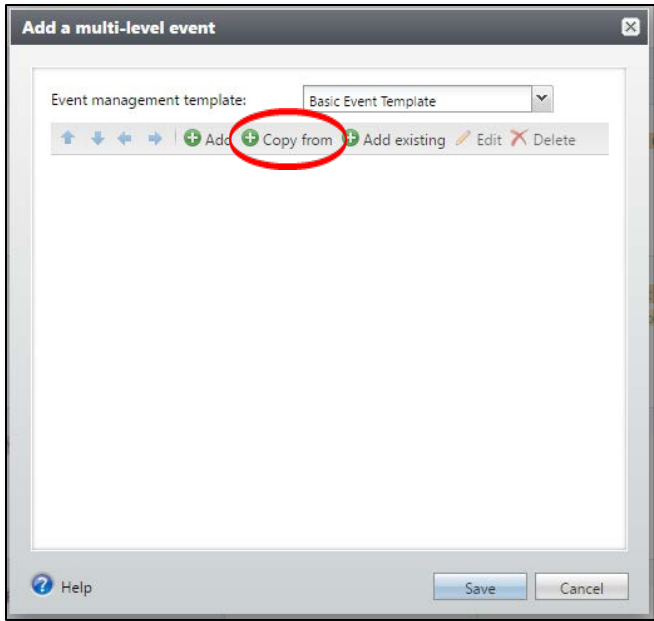
Room/Unit: Capacity:

Contact:

- i. Click the **Copy from** button to add an event and copy specific features from another event, if applicable. If not, input all necessary information for the *overall* event (do not include specifics for one of the events).
 1. For example: If your event spans two days, put the start date and time in as Friday, May 18, 2018 at 11:30 a.m. and end date and time as Sunday, May 20 at 6:00 p.m.

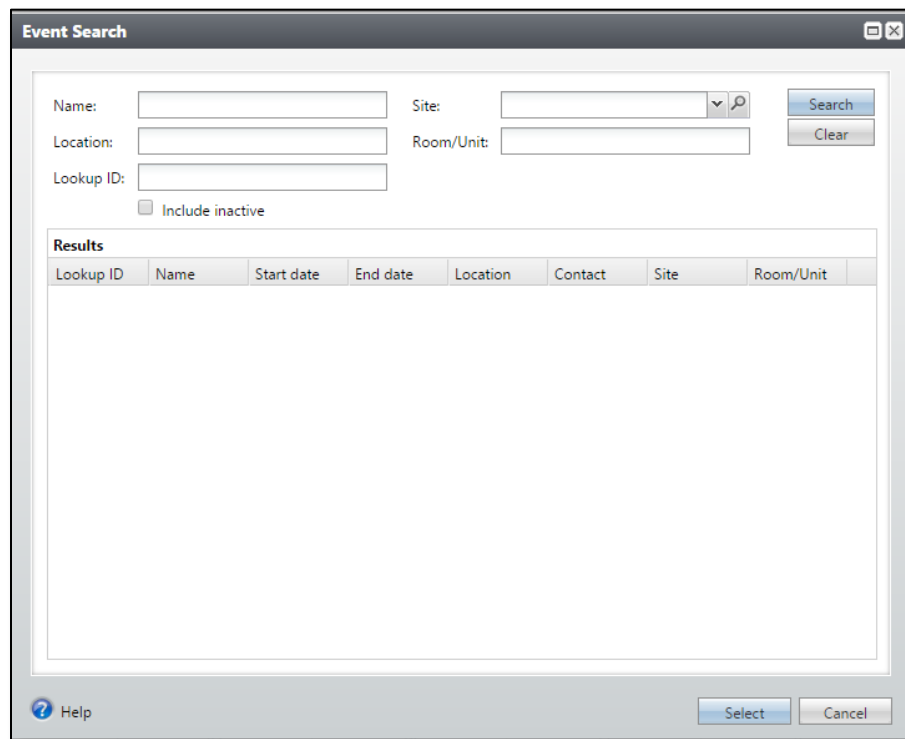
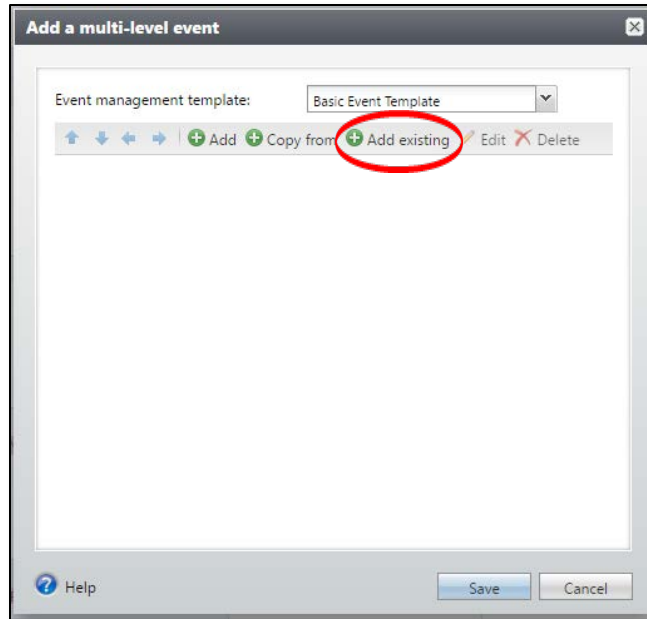
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- ii. Click the **Add existing** button to open the **Event search** window and add an existing event to the multi-level event.

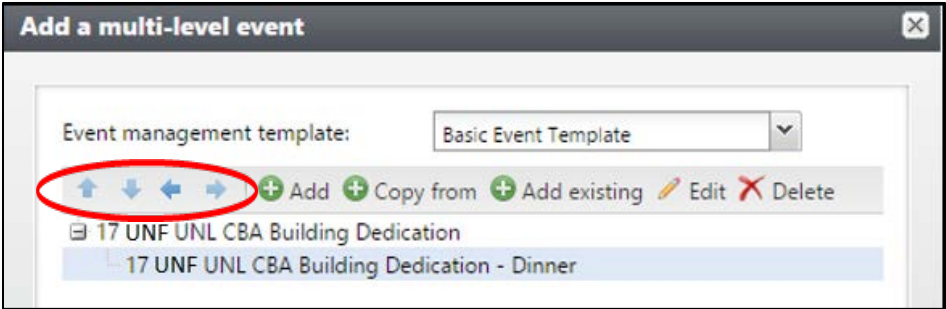
EVENTS MANAGEMENT



- c. Each event you add to the multi-level event displays in a hierarchical format.
- d. Use the arrows to show the hierarchical levels or tiers of events and how the supporting events are related.

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e. Click **Save**.

Event Summary Record

All events associated with multi-level events have an event summary record. This event summary record will automatically open once the **Add a multi-level event** is saved. From this summary record, users can navigate to all the events associated with the multi-level event.



The following table identifies the tabs on the event summary record and includes a description of each:

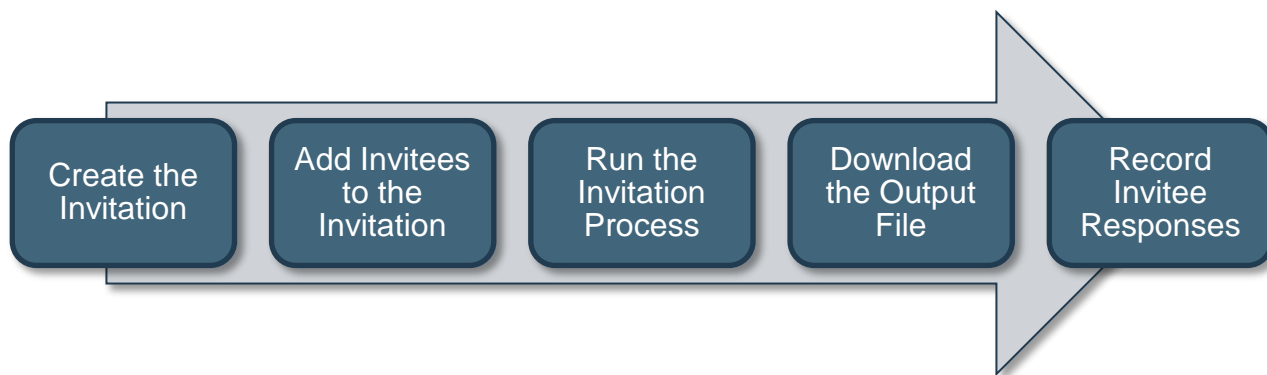
Tab	Information
Events	Displays information about the main event and each event that supports the main event.
Tasks	Displays tasks for all events associated with the main event.
Registrants	Displays registrants for all events associated with the main event.
Expenses	Displays expenses for all events associated with the main event.

Event Invitations

Using the event invitation functionality in Ali, you can:

- Manage the invitation processes your organization uses for events.
- Create lists of invitees for events, and manage invitation statuses for each invitee in a list.
- Run automatic invitation processes to record that invitations were sent and create an export.
- Add multiple invitation processes for a single event.

The following graphic displays the steps involved in creating and managing invitations:



Create the Invitation

On the **Invitations** tab of an event record, you can add invitations to send through the mail or email for the event.

To Add an Invitation:

1. Select the **Invitations** tab on the event record.
2. On the action bar, click **Add**.

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17 UNF UNL AS Humanities Symposium Breakfast

Start date: 3/10/2017 - 7:30 AM Status: ✘ Inactive

End date: 3/10/2017 - 9:00 AM Lookup ID: 17NUFUNLASHB

Site: University of Nebraska Foundation

Location:

Room/Unit:

Contact:

Coordinator:

Category: UNF

Event expenses

Expense budget: \$0.00

Agreed expenses: \$0.00

Amount paid: \$0.00

0% of budget

Event capacity

Event capacity: 0

Will attend: 0

Will not attend: 0

0% of capacity

Registrations Tasks/Coordinators Documentation **Invitations** Expenses Options Speakers Appeals Job Occurrences Loggin

Invitations (1) + Add - More ▼

Name	Mail date	Description
RE7 INVITATION LIST	1/1/1901	17 NUF UNL AS Humanities Symposium Breakfast

Add an invitation

General Processing Options

Name: 17 UNF UNL AS Humanities Symposium

Description: Invite list

Mail date: mm/dd/yyyy

Results

Create selection from results

Selection name: _____

Overwrite existing selection

Help Save Cancel

3. Complete the following fields and options on the **Add an invitation** window:
 - a. **Name:** Use the title of the event name.
 - b. **Description:** Add the purpose of this invitation (Save-the-date email, mailed invite, reminder email, etc.) and any other necessary details.

EVENTS MANAGEMENT



- c. **Mail Date:** Pick the date you will mail/email these invitations.
Note: If you select a date in the future for mailing, the list will *not* be available to view or export until that future date. If you wish to look at the list immediately, you must select the date you are creating the event. Otherwise Ali CRM will not “develop” the list and let you export it until the future mailing date you selected.

The screenshot shows the 'Add an invitation' dialog box with the 'Processing Options' tab selected. The 'How do you want to send your invitation?' section has three radio buttons: 'Send through both mail and email, according to each constituent's preferences.' (unselected), 'Send through email only' (unselected), and 'Send through mail only' (selected and circled in red). Below this is a dropdown menu for 'If the constituent does not have a preference, attempt to send:' set to 'Email'. The 'Select the package(s) for your invitation' section has two rows for 'Email package' and 'Mail package', each with a search box and 'Cost: \$0.00 Content:'. The 'Select the address processing and name format options for your invitation' section has 'Address processing:' set to '*NU - Standard Address Processing' and 'Name format:' set to 'Primary Name Format'. The 'Select household options for your invitation' section has 'Include:' set to 'Qualifying individuals and organizations' and three checked checkboxes: 'Send to one person per household', 'Also include qualifying households which do not have any members', and 'Also include qualifying individuals who are not members of any household'. At the bottom are 'Help', 'Save', and 'Cancel' buttons.

4. Click **Processing Options** tab.
- a. **How do you want to send your invitation?** Select whether to send the invitation through mail, email, or both. IT IS RECOMMENDED that you select **Send through mail only**.
- i. **Send through mail and email, according to each constituent's preferences** will utilize the mail preferences on a constituent's record and will only send it via the preferred method or the default chosen.

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- ii. If you choose either of the send through email options, your invitation will send directly out of Ali and will send once the process is run. **DO NOT** click send until you are ready for the email to be pushed out.
5. **Mail package.** Select the package(s) for your invitation:
- a. The package type (mail or email) will default based on your selection above for **How do you want to send your invitation.**
 - b. Click the magnifying glass to select your package.
 - c. A new window will open called **Package search.**
 - d. Click **Add** (if you need to create a mail package and aren't using one previously created).

- i. A new window will open called **Add mail package.** Complete the required and desired fields. **Naming:** You can create a mail package once and then reuse it for all events you are setting up as long as all the fields you want to include in the export remain the same.
 1. **Example:** UNF staff may repeatedly use the preset option titled **Mail Package for Event Invitation Mailing List – AB**
 2. If you need to set up a new mail package you can create a generic package that can be reused for each event you set up, or you may set up one specific to use with this event only. See the next step.
- e. **Description:** Short description of who/what is on this mailing list.
 - i. **Note:** If your invitee list uses more than one selection, it will be helpful for you to list out the names of the various selections in this field for future reference. There is no way to determine who was manually entered.

EVENTS MANAGEMENT

- f. **Site:** Pick the Site relevant to your event. (The rest of the fields remain blank until export definition. See next step.)

Add mail package

Package details

Name:

Description:

Site:

Category:

Package code:

Channel code:

Costs

Base cost: Distribution:

Additional content cost:

Total per piece cost:

Primary content

Letter:

Export definition:

Help Save Cancel

- g. **Export Definition:** Click the magnifying glass to search for the export definition. Use the export definition titled **Event Invitation Mailing List**.
- h. Save the new mail package. It will prepopulate into the “mail package” blank on the add invitation page.

Export Definition Search Form

Name: Site:

Search Clear

Results (1 record found)

Name	Type	Site	Description
Event Invitation Mailing List	Direct Marketing Effort Se...		Used for mail merge for m...

6. **Address processing:** Select which address types to use for the invitation.
7. **Name format:** Select the addressees and salutations to use for the invitation.
8. **Include:** Select the types of constituents to include in the invitation.
9. Click **Save**.

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Add Invitees to the Event

To Add/Access an Invitee List:

1. Open the event record.
2. Select the **Invitations** tab.
3. Click the [blue hyperlinked name](#) of the invitation to open the **Edit invitation** window. (Do *not* click the chevron to expand.)

18 UNF UNO COE Biomechanics Addition Groundbreaking

Start date: 5/21/2018 - 5:30 PM Status: **Inactive** 100%
 End date: 5/21/2018 - 9:00 PM Lookup ID: 18UNFUNOCOEBAG 50%
 Site: University of Nebraska Foundation 0%

Location: UNO Biomechanics Research Building
 6160 University Dr South
 Omaha, NE 68182

Room/Unit:
 Contact:
 Coordinator: Admiral Annie E. Bougger
 Category: UNF

Event expenses
 Expense budget:
 Agreed expenses:
 Amount paid:
 79% of budget

Registrations Tasks/Coordinators Documentation **Invitations** Expenses Options Speakers A

Invitations (1) + Add More ▾

Name	Mail date	Description
18 UNF UNO COE Biomechanics A...	5/29/2018	Invite list 1

4. Select the **Invitees** tab.
5. Click **Add**. Select one of two options:
 - a. Select **Constituent** to add an individual invitee.

Invitees Invitation History

Invitees (0) + Add ▾ + Copy from More ▾

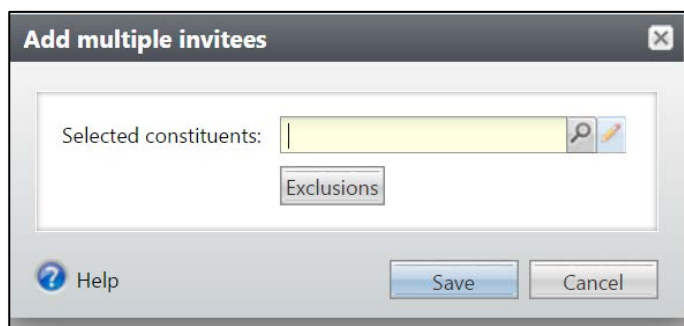
+ Constituent Include in next send: ▾

+ Multiple constituents Status: ▾

Invitee	Invitation sent on	Registered
---------	--------------------	------------

1. The **Add an invitee** window will open.
2. Click on the magnifying glass to open a constituent search.
3. Utilize the search fields to find the correct constituent.

4. Select the constituent you want by highlighting the row and clicking **Select** or by clicking on the constituent name.
 - a. **Note:** Be careful to invite only individual or organization constituents. Do *not* add committee or household records. If all members of a committee (for example, ***regents***) should be invited, use the process below to add **Multiple Constituents** instead of adding the committee record, and then add the *selection* containing all members.
5. Click **Save**.
- b. Select **Multiple Constituents** to add multiple invitees by using a selection.
 1. The **Add multiple invitees** window will open:



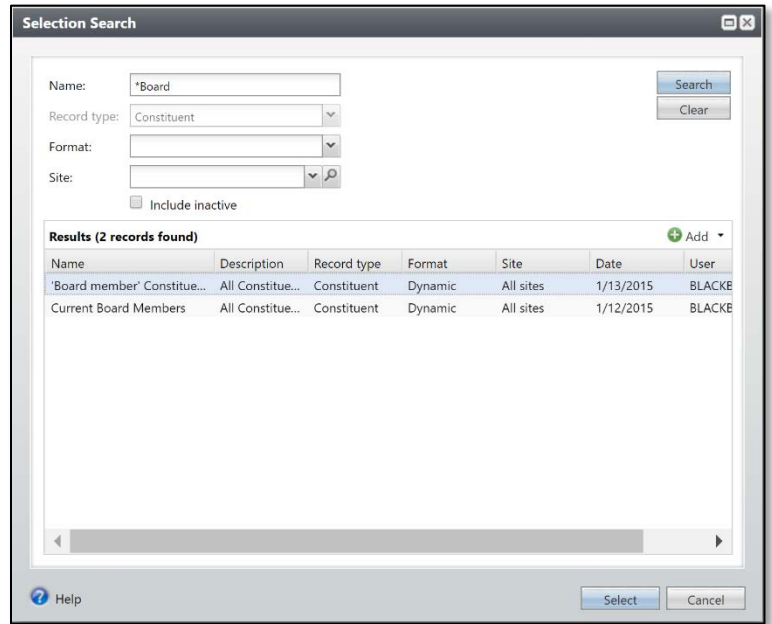
2. Click on the magnifying glass to open a **Selection search**.

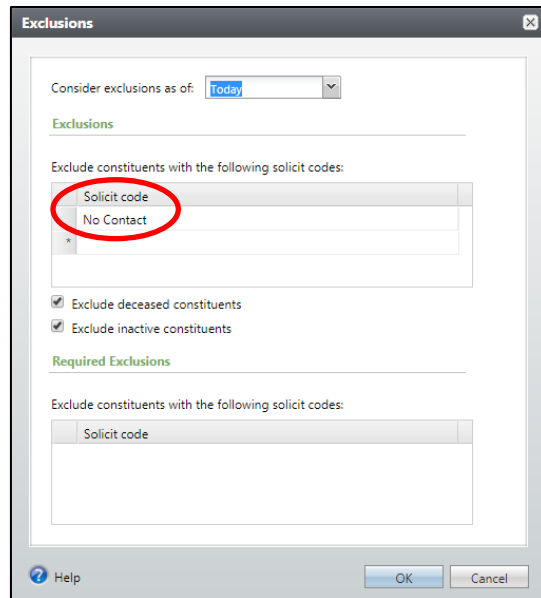
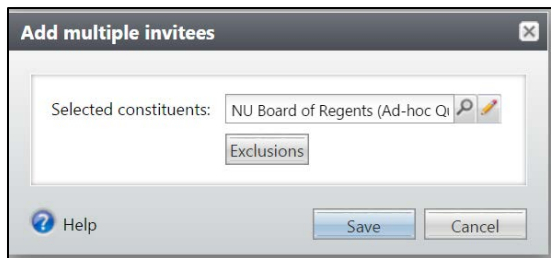
Note: If you have a CSV file of Lookup ID numbers, you can create your own selection using a selection import. For more details on that functionality, please see the [Guide Importing a Selection](#). To request a selection to be built from a query, send an email to biographicalrecords@nufoundation.org
3. Type in the name of the selection.

Note: A selection is a list of constituents resulting from a query or import who share a set of criteria.

 - a. The selection name will be developed by University of Nebraska Foundation's Research, Records and Analytics (RRA) Team.
 - i. UNF staff members are assigned to an RRA staff member to work with on event list selections.
 - ii. University staff should contact Jessie Rader, Director for Advancement Records & Research, at jessie.rader@nufoundation.org or (402) 458-1206.

- Prior to contacting Jessie, review your event invitation list and look up the invitees' LookupIDs in Ali. New IDs will be created for those guests for whom you cannot find an ID in the system.
 - Once your list is ready to be imported into Ali, Jessie will ask for your complete invitation list in an Excel spreadsheet with specific fields/columns necessary for import. Those specifics will be shared with you by Jessie.
4. Select the list you want by highlighting the row and clicking **Select** or by double-clicking on the selection name.
 5. Review the **Exclusions** to determine if any other additional solicit codes are needed.
 - a. If the selection was built *specifically for your event*, exclusions will be managed by the RRA team building the list. (This means you will *not* manually need to adjust any exclusions.)
 - b. If, however, you are adding *generic selections* (such as Board of Regents, or selection lists used widely across the Ali user base), then you must add an exclusion to omit anyone with a solicit code of **No Contact** or **No UNF Events**.





6. Click **Save**.

Repeat steps above to continue to add invitees (via selection) until you have your invitation list complete. You will see a list begin to populate under the invite you created.

Note: If a constituent is populated in the invitee list, they will not be duplicated if they appear in more than one selection being used to create the invitation list.



Run the Invitation Process

Once you create a list of invitees for an event, you can run an invitation process. Running an invitation process creates an output file that includes the names and addresses of the invitees.

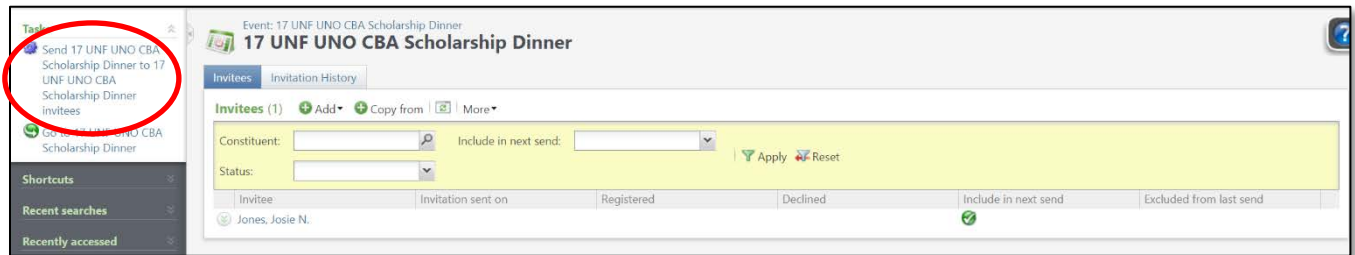
To Run the Invitation Process

The invitation process can be run through the **Event invitation window** or from the **Invitations** tab.

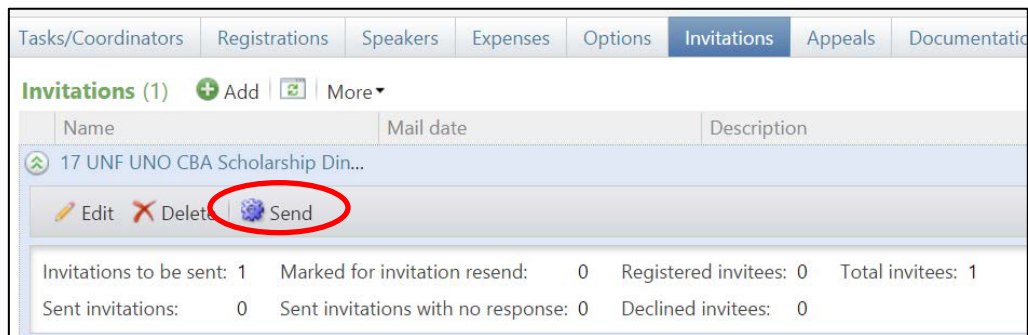
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1. The **Event invitation** window: In the upper left-hand corner, click **Send invite for {name of your event}**. This is running the invitees through the processing options determined in the invitation set up.

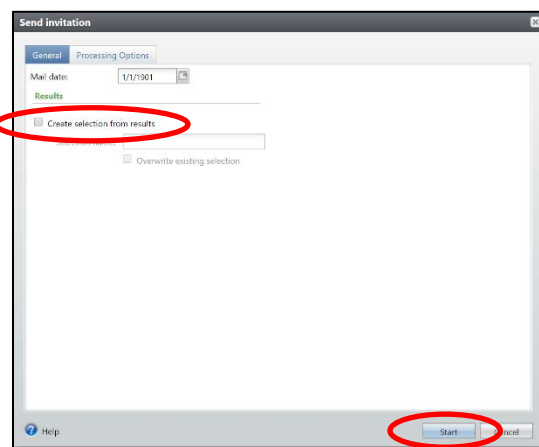


2. *OR* - Select the **Invitations** tab.
 - a. Click the expand icon to the left of the invitation process to run.
 - b. In the frame that appears below the invitation, click **Send**.



3. After clicking the **Send** icon via either method, the Send invitation window will open, allowing you to confirm the settings you chose when creating your invitation list.

Note: Leave the **Create selection from results** box *unchecked*.



4. Click **Start**.
5. The **Invitation process** status page will appear. Confirm the Status is **Running**.

Invitee List
17 UNF UNO CBA Scholarship Dinner

Event: 17 UNF UNO CBA Scholarship Dinner
Name: 17 UNF UNO CBA Scholarship Dinner
Description:

Recent Status | History | Job Schedules

Status: **Running**
Status message: Activating mailing...
Started by: NUFOUNDATION\jrader Server name: TUVALU
Started: 4/20/2017 10:50:48 AM Total records processed: 0
Ended: Number of exceptions: 0
Duration: 9 seconds Records successfully processed: 0

Export outputs (1) | More ▾

Export definition	Count	Packages
Event Invitation Mailing List	1	Invitation Mailing - 17UNF UNO C...

6. Once completed, the Status will show **Completed**.

Invitee List
17 UNF UNO CBA Scholarship Dinner

Event: 17 UNF UNO CBA Scholarship Dinner
Name: 17 UNF UNO CBA Scholarship Dinner
Description:

Recent Status | History | Job Schedules

Status: **Completed**
Status message: Completed
Started by: NUFOUNDATION\jrader Server name: TUVALU
Started: 4/20/2017 10:50:48 AM Total records processed: 1
Ended: 4/20/2017 10:51:08 AM Number of exceptions: 0
Duration: 20 seconds Records successfully processed: 1

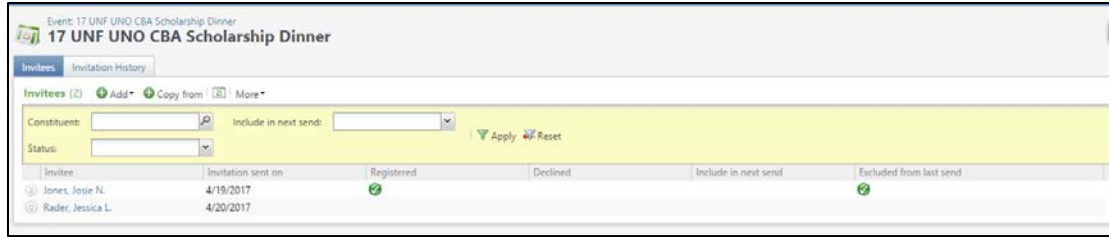
Export outputs (1) | More ▾

Export definition	Count	Packages
Event Invitation Mailing List	1	Invitation Mailing - 17UNF UNO C...

7. You can also navigate back to the **Invitee List** and review the statuses of the invitees.



Note: If you find a constituent was not included in the process, it may be because of his/her Mail Preferences. **If you are sending your invitation by mail and the constituent has a preference to receive invitations by email only, they will not pull into the mailing list.** You must send them an email separate from the process.

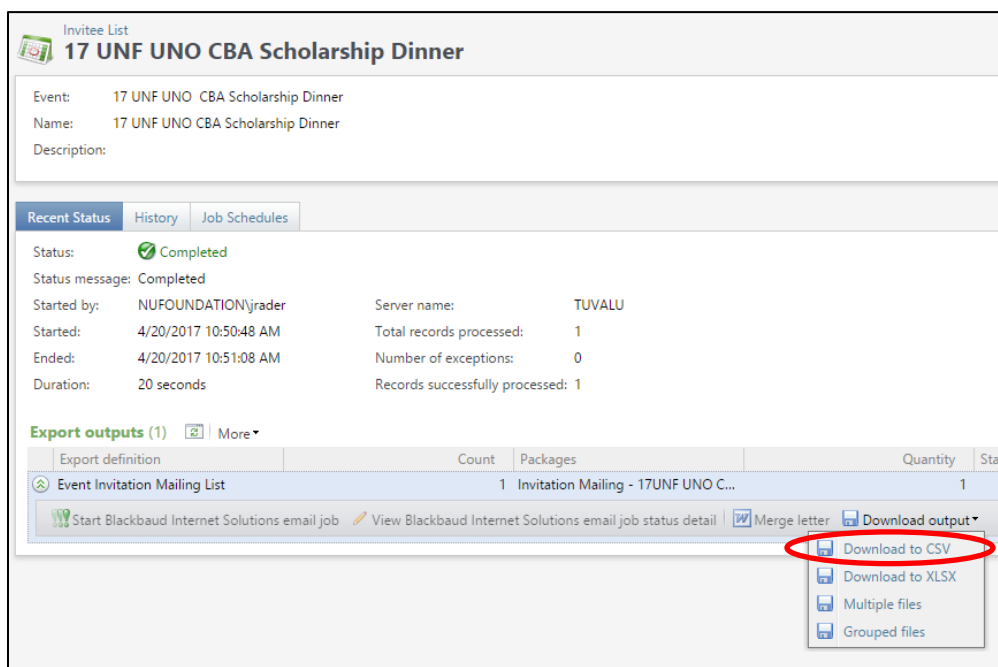


Download Output Files

Once you run the invitation process, the invitation process status page appears. On this page, you can download the output file in a comma-separated values format (.csv). The data in the output file is based on the export definition you chose when setting up the mail package. The standard export definition titled **Event Invitation Mailing List** will provide all the necessary fields to address envelopes for mailings. This list also provides email addresses if you are sending email invitations outside of Ali.

To Download a Single Output File:

1. On the invitation process status page, click the **Recent Status** tab.
2. Under **Export outputs**, click the expand icon to the left of the **Export output to download**.
3. Select **Download output**.
4. Select **Download to CSV**.



5. Once the download is complete, save the output file to your computer or preferred network drive.

EVENTS MANAGEMENT

Note: If a letter was added when creating the mail package, merge the letter in this step and download the merged letter. Typically, event invitations are not letters so this functionality will likely *not* be used.

Determine Whether a Constituent was Invited and/or Responded to an Event Invitation

In Ali, you are able to reference a constituent record to see if the person has **responded to an event invitation**.

Note: The **Events** tab of a constituent record *may not* show all event invitations.

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



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. *This is a significant change from the way events-related information was previously managed. Any historical events to which the constituent was invited in the previous Raiser's Edge system will convert to this tab regardless of their registration status.*

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, canceled, 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 filter to limit the communication type to **Event Invitations** before clicking **Apply**.

The screenshot shows the Ali system interface. The 'Communications' tab is active. A filter dropdown is set to 'Event Invitations', and the 'Apply' button is visible. Below the filter, a table displays communication records. The first row is highlighted and circled in red, showing a date of 3/22/2017, a communication type of 'Event Invitation', and a subject of '17 NAA YAA Baseball Event - 17 N...'. The 'Has responses' column for this row is 'No'.

Date sent	Communication	Details	Has responses	Site	Channel
3/22/2017	Event Invitation	17 NAA YAA Baseball Event - 17 N...	No	N/A	Mail

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Event Registration

RSVP Management

Note: Ali's events management functionality is very robust, yet the tracking of RSVP responses may be managed using a different method such as Attend.com, phone calls, and/or emails. **Every effort should be made to enter RSVP responses in as near a live-time manner as possible.** For example, the foundation's events management team enters RSVPs into Ali with the assistance of other team members on a near-constant basis. Because Ali is a transactional database, those changes are immediately viewable by other users across the system.

Navigating the Registrations Tab

The **Registrations** tab of an event record has filtering capabilities that allow you to quickly find the registrants you are reviewing.

- The **Type** field allows you to limit your view to **Preregistration**, **Invitation**, or **Walk-in**.
- The **Status** field allows you to limit your view to **Will not attend**, **Registered**, **Canceled**, **No reply**, or **Declined**.
- The **Registrant** field allows you to limit your view to a specific registrant.
- The **Attended** field allows you to limit your view to **(Unspecified)**, **Yes**, **No-Show**, or **No**.

Note: To implement these filters you must click **Apply**. These filters are “sticky” so you must click **Reset** to default back to the full list.

Add Registrants and Guests for a Single Event

When you register a constituent for an event, indicate how many guests the constituent is bringing and record registration options for all the registrants.

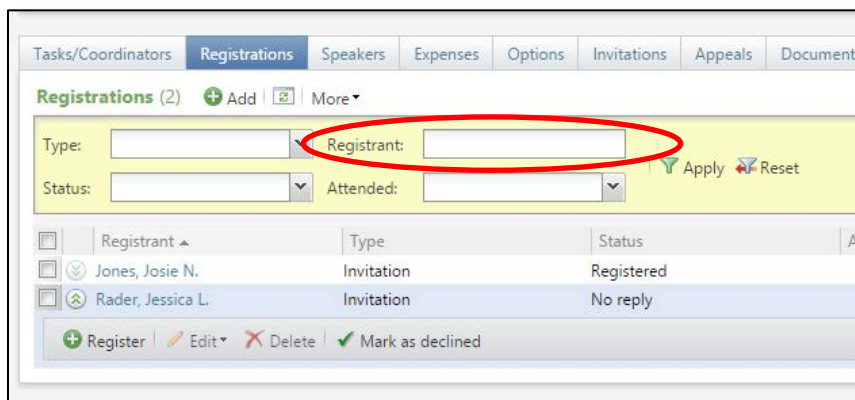
To Add an Invited registrant:

1. Open the event record.
2. Select the **Registrations** tab.
3. Click the double chevron icon to the left of the registrant's name to expand the line.

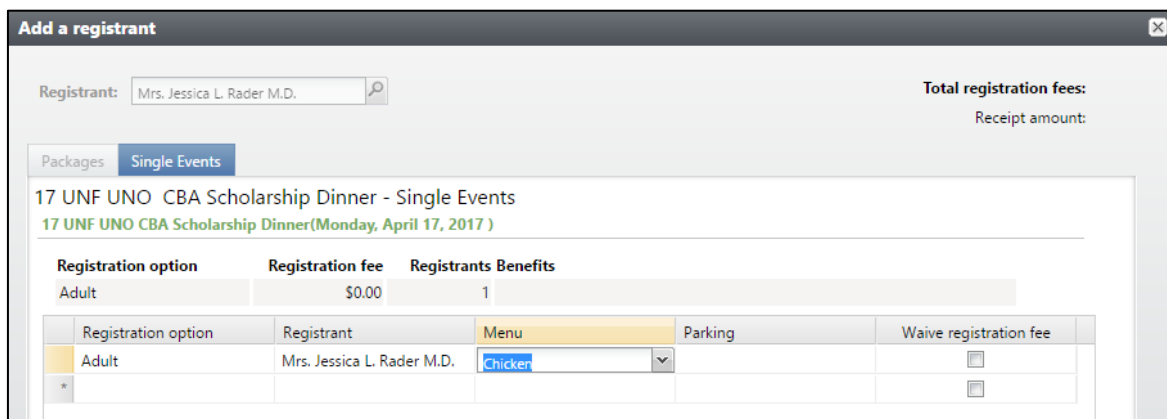
Tip: If you have a large number of registrants, save time by typing into the **Registrant** field a **Last Name** or ***First Name** to find your guest quickly.

EVENTS MANAGEMENT

4. Click **Register**.



5. The **Add a registrant** window will open.
 - a. Select the registration option.
 - b. Select any necessary preferences.
 - c. Waive registration fee for complimentary registrations.
 - d. If they do not have a guest, click **Save**.

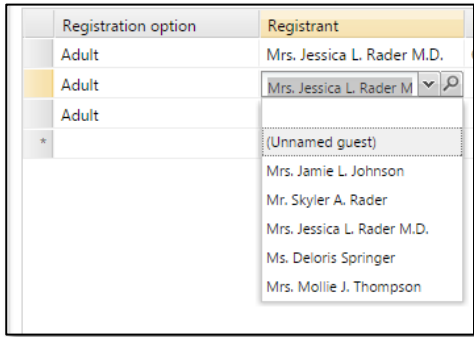


- e. If they have a guest, complete the following steps:
 - i. Click on the line below.
 - ii. Select the registration option.

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- iii. Select the registrant.
 1. The constituent’s individual relationships (as identified on his or her Ali constituent record **Relationships** tab) will populate in the drop-down list as a quick search function.
 2. If the guest is not a relationship, use the magnifying glass to do a constituent search.
 3. If the guest is not a constituent and does not need to be added as a constituent, utilize the **(Unnamed Guest)** function.
- iv. Select any necessary preferences.
- v. Waive registration fee if necessary.
- f. Repeat steps as needed until the guest list is complete.
- g. Click **Save**.



6. Once the registration is saved, the **Registrant** record opens automatically. The registrant record tracks information about guests, registrations, preferences, and benefits for the selected registrant.

Event: 17 UNF UNO CBA Scholarship Dinner

Mrs. Jessica L. Rader - Event Registrant

	1010 Lincoln Mall Ste 300 Lincoln, NE 68508-2886	Registrant ID: evreg-11370802	Total registration fees: \$0.00	Payment history:
	402-458-1206	Type: Invitation	Total paid: \$0.00	
	jessie.rader@nufoundation.org	Status: Registered	Balance: \$0.00	
	www.linkedin.com/in/jessierader	No. of guests: 1	Total receipt amount: \$0.00	

Registrations Benefits Lodging and Travel Restrictions Attributes

Registrations Edit

Mr. Skyler A. Rader
17 UNF UNO CBA Scholarship Dinner (Monday, April 17, 2017)
Adult Chicken

Mrs. Jessica L. Rader
17 UNF UNO CBA Scholarship Dinner (Monday, April 17, 2017)
Adult Chicken

To Add a Registrant:

Registrants can be added manually outside of the invitation process. These registrants will automatically be marked as registered. If you need to add more than 10 additional names, it is recommended that you utilize the [Invitation Process](#).

1. Open the event record.
2. Select the **Registrations** tab.
3. On the action bar, click **Add**.

18 UNF Annual Meeting of Trustees

Start date:	10/19/2018 - 5:30 PM	Status:	100%	Event expenses
End date:	10/19/2018 - 8:30 PM	Active	50%	Expense budget:
Site:	University of Nebraska Foundation	Lookup ID:	0%	Agreed expenses:
Location:		8-10003019		Amount paid:
Room/Unit:				1033% of budget
Contact:				
Coordinator:	Admiral Annie E. Bougger			
Category:	UNF			

Registrations (1,019) **Add** More

Type: Registrant:

Status: Attended:

Apply

4. The **Add a registrant** window will open.
 - a. Select the **Single Events** tab.

Add a registrant

Registrant:

Preregistration **Total registration fees: \$0.00**
 Walk-in registration Receipt amount: \$0.00

Packages: **Single Events**

18 UNF Annual Meeting of Trustees - Single Events
 18 UNF Annual Meeting of Trustees (Friday, October 19, 2018 5:30 PM - 8:30 PM)

Registration option	Registration fee	Registrants Benefits
Individual	\$0.00	0

Registration option	Registrant	Waive registration fee
		<input type="checkbox"/>

- b. **Registrant:** Click on the magnifying glass to search for and select the constituent to register. If the registrant is not a constituent and needs to be added, please email the University of Nebraska Foundation's Systems Information team (biographicalrecords@nufoundation.org). If a guest or registrant needs to be registered without a record in Ali being created, and for additional important information about this topic, please see [To Add a Registrant Without a Constituent Record](#).

Add a registrant

Registrant: Ms. Angela B. Taylor

Preregistration **Total registration fees: \$0.00**
 Walk-in registration Receipt amount: \$0.00

Packages: **Single Events**

18 UNF Annual Meeting of Trustees - Single Events
 18 UNF Annual Meeting of Trustees (Friday, October 19, 2018 5:30 PM - 8:30 PM)

Registration option	Registration fee	Registrants Benefits
Individual	\$0.00	0

Registration option	Registrant	Waive registration fee
	Ms. Angela B. Taylor	<input type="checkbox"/>

- c. Indicate whether the constituent is a pre-registrant or a walk-in.
- i. **Preregistration:** Add guest to list prior to event.
 - ii. **Walk-in registration:** Guest attended event without an RSVP; add them after the event.
- d. Select any necessary preferences.
- e. Waive registration fee for complimentary registrations.
- f. Click **Save**.

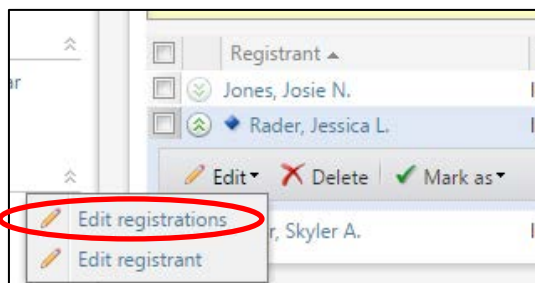
To Add a Registrant Without a Constituent Record:

There will be instances when it is not necessary or feasible to add a constituent record for a registrant or guest. To determine if a constituent record is needed consider whether this individual will have future interactions with us, be it events, solicitations or future interests.

Note: If time does not allow for a constituent record to be made, follow the steps below. Once the constituent record has been created, update the registration.

1. Open the event record.
2. Select the **Registrations** tab.
3. Click on the double chevron next to the guest's host's name.

Note: If the non-constituent registrant does not have a host, add them as a guest of the event coordinator. The event coordinator must be registered for the event to have guests.



4. Click **Edit**.
5. Click **Edit registrations**.
6. The **Add a registrant** window will open.
 - a. Select the registration option.
 - b. Select the registrant of (Unnamed Guest).
 - c. Select any necessary preferences.
 - d. Waive registration fee for complimentary registrations.
 - e. Click **Save**.

Edit registration

Registrant: Mrs. Jessica L. Rader Total registration fees: \$0.00
Receipt amount: \$0.00

Packages **Single Events**

17 UNF UNO CBA Scholarship Dinner - Single Events
17 UNF UNO CBA Scholarship Dinner(Monday, April 17, 2017)

Registration option	Registration fee	Registrants	Benefits
Adult	\$0.00	3	

Registration option	Registrant	Menu	Parking	Waive registration fee
Adult	Mrs. Jessica L. Rader	Chicken		<input type="checkbox"/>
Adult	Mr. Skyler A. Rader	Chicken		<input type="checkbox"/>
Adult	(Unnamed guest)	Chicken		<input type="checkbox"/>
*				<input type="checkbox"/>

Tasks/Coordinators **Registrations** Speakers Expenses Options Invitations A

Registrations (4) + Add [2] More ▾

Type: Registrant:

Status: Attended:

<input type="checkbox"/>	Registrant	Type	Status
<input type="checkbox"/>	Guest of Mrs. Jessica L. Rader	Invitation	Registered
<input type="checkbox"/>	Jones, Josie N.	Invitation	Registered
<input type="checkbox"/>	Rader, Jessica L.	Invitation	Registered
<input type="checkbox"/>	Rader, Skyler A.	Invitation	Registered

To Add Unnamed Guest Attributes:

If you have an unnamed guest, you will need to add in attributes to capture their first and last name for name tag purposes.

Note: Complete these steps immediately after registering an unnamed guest to avoid multiple unnamed guests in your RSVP list.

1. Open the event record.
2. Select the **Registrations** tab.
3. Click on the **Guest of [host name]** hyperlink to open the registrant record.
4. Navigate to the **Attributes** tab.

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a. Click **Add**.

Event: 17 UNF UNO CBA Scholarship Dinner > Host: Mrs. Jessica L. Rader
Guest of Mrs. Jessica L. Rader - Event Guest

Registrant ID: evreg-11370804 Total registration fees: \$0.00 Payment history:
Type: Invitation Total paid: \$0.00
Status: Registered Balance: \$0.00
No. of guests: 0 Total receipt amount: \$0.00

Registrations Benefits Restrictions **Attributes**

Attributes (0) **Add** More

Category	Attribute group	Value
----------	-----------------	-------

i. The **Add Registrant Attribute** window will open.

1. **Category:** Event Guest **First** Name
2. **Value:** Unnamed Guest's First Name
3. **Comment:** Firstname Lastname
4. Click **Save**.

Add registrant attribute

Category: Event Guest First Name
Value: Leila
Start date: mm/dd/yyyy
End date: mm/dd/yyyy
Comment: Leila Rader

Help Save Cancel

b. Click **Add**.

i. The **Add Registrant Attribute** window will open.

1. **Category:** Event Guest **Last** Name
2. **Value:** Unnamed Guest's Last Name
3. Click **Save**.

Add registrant attribute

Category: Event Guest Last Name
Value: Rader
Start date: mm/dd/yyyy
End date: mm/dd/yyyy
Comment:

Help Save Cancel

Event: 17 UNF UNO CBA Scholarship Dinner > Host: Mrs. Jessica L. Rader
Guest of Mrs. Jessica L. Rader - Event Guest

Registrant ID: evreg-11370804 Total registration fees: \$0.00 Payment history:
Type: Invitation Total paid: \$0.00
Status: Registered Balance: \$0.00
No. of guests: 0 Total receipt amount: \$0.00

Registrations Benefits Restrictions **Attributes**

Attributes (2) **Add** More

Category	Attribute group	Value	Start date
Event Guest First Name		Leila	
Event Guest Last Name		Rader	

NOTES

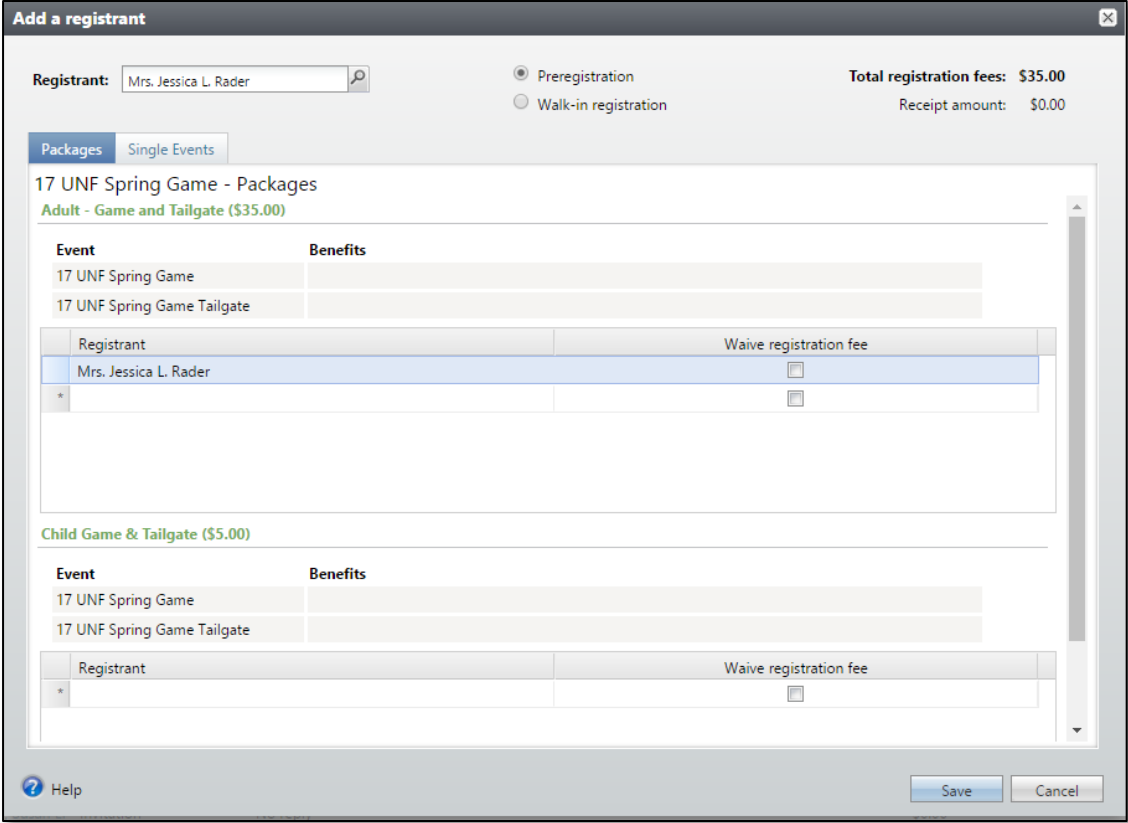
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Add Registrants to Multi-Level Events Using Registration Packages

For multi-level events, registrants may choose to register for a package or individual events.

To Add a Registrant for Multiple Events:

- 1. Search for and open the **main** event record.
- 2. Select the **Registrations** tab.
- 3. On the action bar, click **Add**.
 - a. Select the **Packages** tab to register a constituent and any guests for multiple events at one time.



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- b. Select the **Single Events** tab to register a constituent and any guests for one or more of the events.

Add a registrant

Registrant: Mrs. Jessica L. Rader

Preregistration Walk-in registration

Total registration fees: \$60.00
Receipt amount: \$0.00

Packages **Single Events**

17 UNF Spring Game - Single Events
17 UNF Spring Game(Friday, April 14, 2017)

Registration option	Registration fee	Registrants	Benefits
Adult	\$25.00	1	
Child	\$0.00	0	

Registration option	Registrant	Waive registration fee
Adult	Mrs. Jessica L. Rader	<input type="checkbox"/>
*		<input type="checkbox"/>

17 UNF Spring Game Tailgate(Friday, April 14, 2017)

Registration option	Registration fee	Registrants	Benefits
Adult	\$10.00	0	
Child	\$5.00	0	

Registration option	Registrant	Waive registration fee
*		<input type="checkbox"/>

Help Save Cancel

4. Enter the necessary information to register a constituent and any guests for multiple events at one time.
5. Click **Save**.

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Registrant Record

The registrant record tracks information about guests, registrations, preferences, and benefits for the selected registrant.

Tab	Description
Registrations	Displays information about the registration options for the registrant and their guests. On this tab, you can add, edit and delete registration and guest information in addition to event preferences.
Benefits	Displays applicable benefits information for the registrant.
Lodging and Travel	Displays information about the registrant's lodging and travel plans.
Restrictions	Displays restrictions that must be accommodated.
Participants	Displays information about the registrant's involvement in an event; a registrant may participate in an event as more than an attendee. For example, a registrant may agree to speak at the event, such as part of a welcome address or seminar session. This tab only displays if the registrant has additional involvement in the event.
Attributes	Displays attributes for the registrant.
Designations	Displays the registrant's designations. This tab only appears if the event allows designations on fees.


Add Restrictions

To Add Registration Restrictions:




1. Open the event record.
2. Select the **Registrations** tab.
3. Click the registrant's name.
4. Navigate to the **Restrictions** tab.
5. Click the expand double-down icon next to the registrant's name.






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Event: 17 UNF UNO CBA Scholarship Dinner
Mrs. Jessica L. Rader - Event Registrant

	1010 Lincoln Mall Ste 300 Lincoln, NE 68508-2886 402-458-1206 jessie.rader@nufoundation.org www.linkedin.com/in/jessierader	Registrant ID: evreg-11370802 Type: Invitation Status: Will not attend No. of guests: 2	Total registration fees: \$0.00 Total paid: \$0.00 Balance: \$0.00 Total receipt amount: \$0.00
---	---	--	--

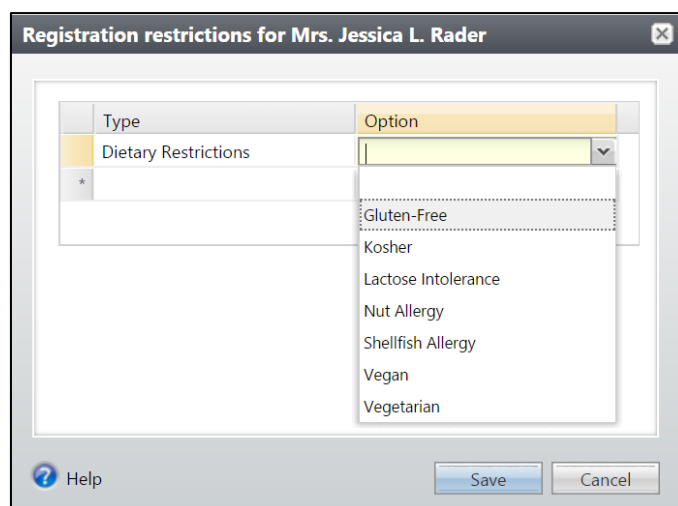
Registrations | Benefits | Lodging and Travel | **Restrictions** | Attributes

Restrictions (3)    More ▾

Registrant name ▾	Type	Option
 Mrs. Jessica L. Rader		
 Edit registration restrictions  Edit constituent default restrictions		
 Mr. Skyler A. Rader		
 Guest of Mrs. Jessica L. Rader		

6. Click **Edit registration restrictions**.
7. The **Registration restrictions for [name of registrant]** window will open.
 - a. Select the restriction **Type**.
 - b. Select the **Option**.

Note: Registration restrictions are saved as part of this event's record *only*.
 - c. Click **Save**.



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Note: You may add as many restrictions as necessary. If the restriction options do not include the option desired, please utilize the registrant attribute of **Dietary Restriction: Other** to capture the information.

Event: 17 UNF UNO CBA Scholarship Dinner
Mrs. Jessica L. Rader - Event Registrant

1010 Lincoln Mall Ste 300
 Lincoln, NE 68508-2886
 402-458-1206
 jessie.rader@nufoundation.org
 www.linkedin.com/in/jessierader

Registrant ID: evreg-11370802
 Type: Invitation
 Status: Will not attend
 No. of guests: 2

Registrations Benefits Lodging and Travel Restrictions **Attributes**

Attributes (0) + Add More

Category	Attribute group	Value
<div style="border: 1px solid gray; padding: 5px;"> <p>Add registrant attribute</p> <p>Category: Dietary Restriction: Other</p> <p>Value: Mushrooms</p> <p>Start date: mm/dd/yyyy</p> <p>End date: mm/dd/yyyy</p> <p>Comment:</p> <p>Help Save Cancel</p> </div>		

To Add Constituent Default Restrictions:

1. Open the event record.
2. Select the **Registrations** tab.
3. Click the registrant's name.
4. Navigate to the **Restrictions** tab.
5. Click the expand double-down icon next to the registrant's name.

Event: 17 UNF UNO CBA Scholarship Dinner

Mrs. Jessica L. Rader - Event Registrant

	1010 Lincoln Mall Ste 300 Lincoln, NE 68508-2886 402-458-1206 jessie.rader@unfoundation.org www.linkedin.com/in/jessierader	Registrant ID: evreg-11370802 Type: Invitation Status: Will not attend No. of guests: 2	Total registration fees: \$0.00 Total paid: \$0.00 Balance: \$0.00 Total receipt amount: \$0.00
--	---	--	--

Registrations | Benefits | Lodging and Travel | **Restrictions** | Attributes

Restrictions (3) More ▾

Registrant name ▾	Type	Option
Mrs. Jessica L. Rader		
<div style="display: flex; justify-content: space-between;"> Edit registration restriction Edit constituent default restrictions </div>		
Mr. Skyler A. Rader		
Guest of Mrs. Jessica L. Rader		

6. Click **Edit constituent default restrictions**.

Note: Constituent default restrictions will write back to the constituent record and will auto-populate on all events the constituent registers for going forward. This will be found on the constituent record's **Personal Info** tab, in the **Personal** sub-tab under Event Restrictions.

7. The **Constituent default restrictions for [name of registrant]** window will open.

- a. Select the restriction **Type**.
- b. Select the **Option**.
- c. Click **Save**.

Constituent default restrictions for Jessica L. Rader ✕

Type	Option
Dietary Restrictions	Nut Allergy
*	

Help

NOTES

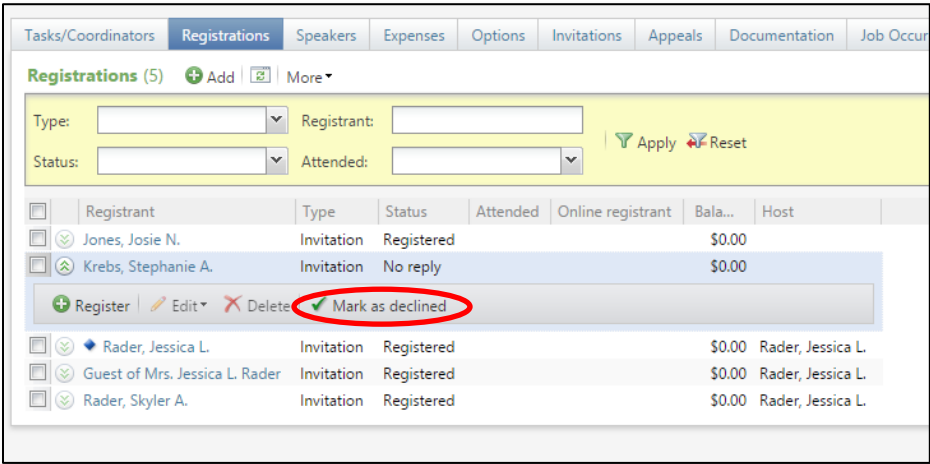
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On the **Registrations** tab of the event record, you track event registrations, also known as RSVPs. Here is an overview of the options available to marking registrations in Ali CRM:

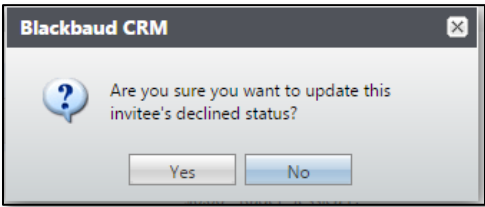
If Status displays:	The response indicates:
Registered	The individual WILL ATTEND.
Declined Canceled Will Not Attend	The individual WILL NOT ATTEND.
No Reply	Individual has NOT RESPONDED.

To Mark an Invitee as Declined:

1. Open the event record.
2. Select the **Registrations** tab.
3. Click the expand icon to the left of the constituent who has declined.



4. In the drop-down frame that displays below the constituent name, click **Mark as declined**.
5. When prompted, click **Yes**.



Tracking Event Attendance

Once registrants are entered into the event, their attendance can be tracked. They can be marked as **Will not attend**, **Attended**, **No-show**, or **Canceled**.

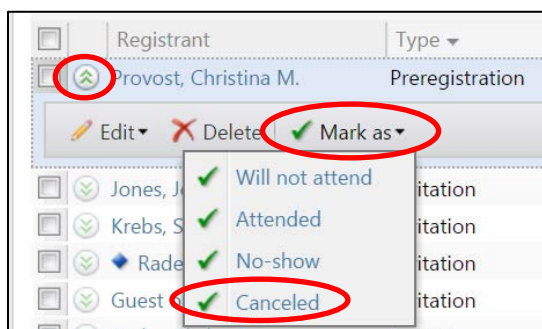
Changing from Accepted to Declined:

If the invitee has been marked registered previously, but now is unable to attend:

1. Open the event record.
2. Select the **Registrations** tab.
3. Click the expand icon to the left of the constituent who has registered.
4. Click **Mark as** and select **Canceled**.



Note: This will replicate the response for all guests registered with the host.



Changing Host from Accepted to Declined without Changing Guest's Status:

If the invitee has been marked registered previously and is unable to attend, but the guests will still attend:

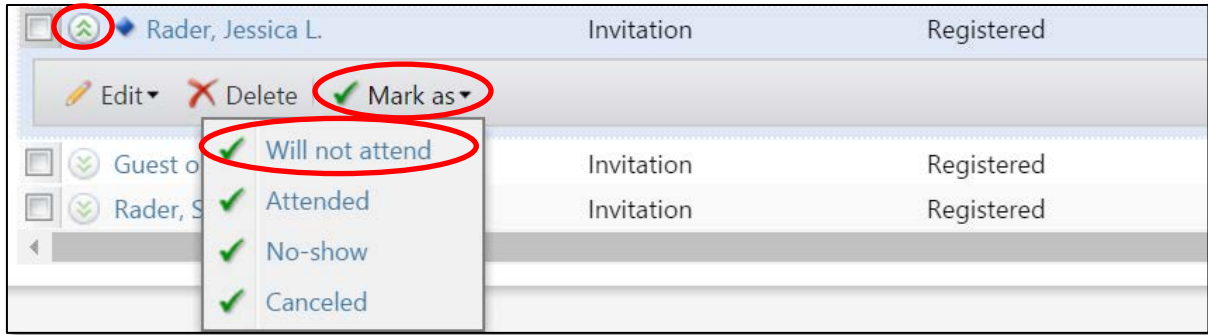
1. Open the event record.
2. Select the **Registrations** tab.
3. Click the expand icon to the left of the constituent who has registered.
4. Click **Mark as** and select **Will not attend**.



Note: This will NOT duplicate to all guests registered under the host.

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Registrant	Type	Status	Attended
Rader, Jessica L.			
Guest of Mrs. Jessica L. Rader	Invitation	Registered	
Rader, Jessica L.	Invitation	Will not attend	No
Rader, Skyler A.	Invitation	Registered	

Note: If an individual registered for the event online (using Attend.com or BBIS) and later changes his or her mind to cancel the registration prior to the event, the options to mark **Will not attend** and **Canceled** are unavailable/greyed out. This is a known issue that Blackbaud is working to resolve. In the meantime, the work-around is to select **No show**.

Tracking Student Attendance:

Due to federal FERPA protections of student data, most students will *not* have constituent records in Ali CRM. This makes it challenging to invite and register students who are invited to and attend events. The UNF events team has identified a work-around for this issue.

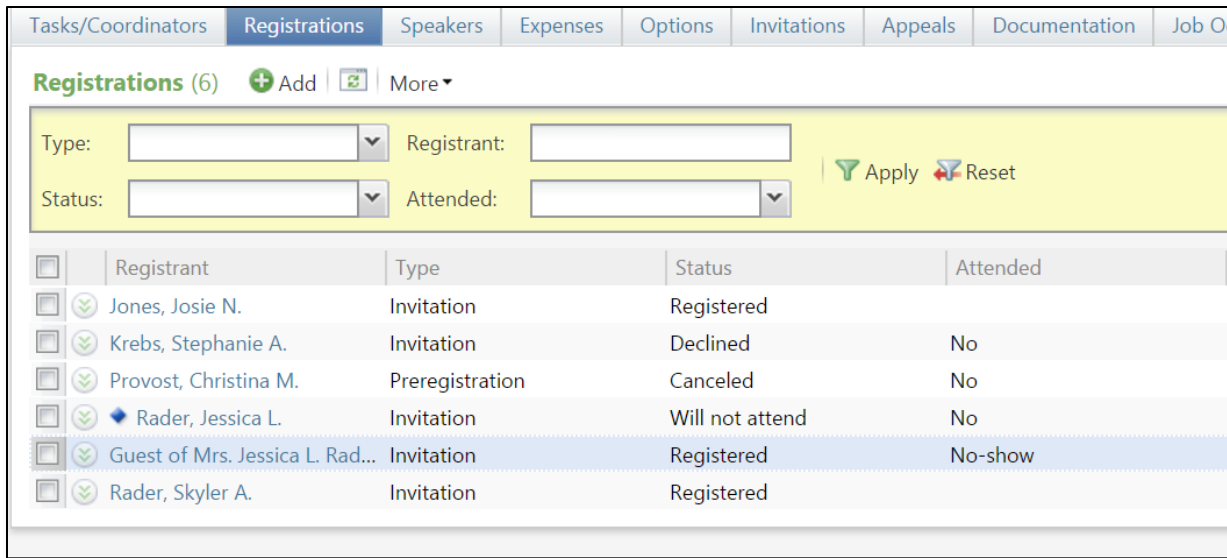
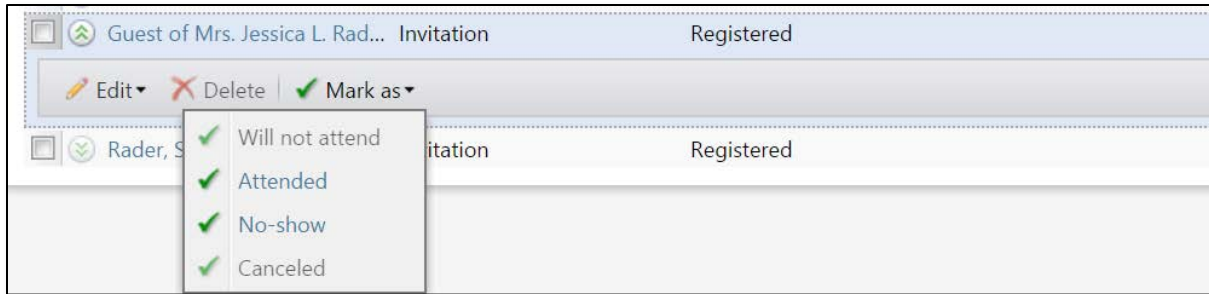
1. Add yourself (event coordinator) as an invitee.
2. Add all non-constituent students as **Unnamed guests** to your own registration.

Tracking Attendance Post-Event:

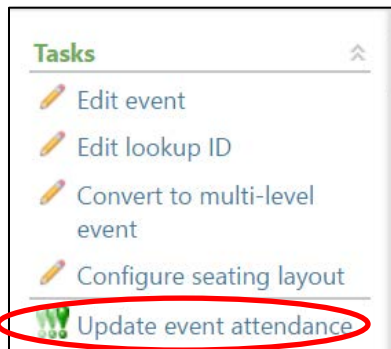
Once your event is complete, you can track those that attended and those that did not by using the **Mark as** field and the **Update Event Attendance** function.

1. Open the event record.
2. Select the **Registrations** tab.
3. Click the expand icon to the left of the constituent who did not show.
4. Click **Mark as** and select **No-Show**.

EVENTS MANAGEMENT



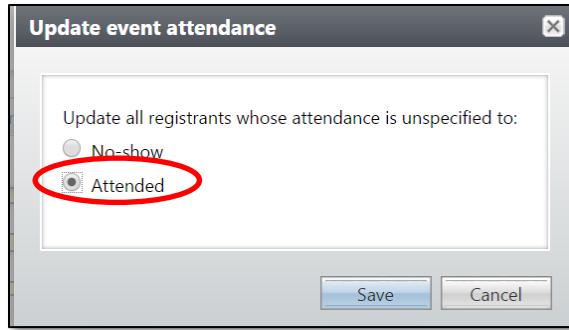
- Under **Tasks** in the explorer bar at left, select **Update Event Attendance**.



- Select **Attended**.

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7. Click **Save**.
8. All remaining registrants that were not marked as **Did not attend** will now be marked as attended.

Tasks/Coordinators Registrations Speakers Expenses Options Invitations Appeals Documentation Job O

Registrations (6) + Add [icon] More ▾

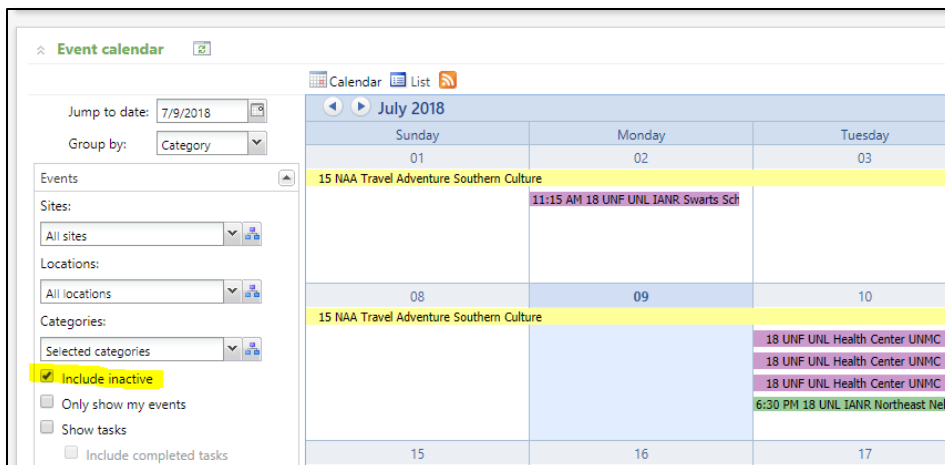
Type: [dropdown] Registrant: [text] Status: [dropdown] Attended: [dropdown] Apply Reset

<input type="checkbox"/>	Registrant	Type	Status	Attended
<input type="checkbox"/>	✓ Jones, Josie N.	Invitation	Registered	Yes
<input type="checkbox"/>	✓ Krebs, Stephanie A.	Invitation	Declined	No
<input type="checkbox"/>	✓ Provost, Christina M.	Preregistration	Canceled	No
<input type="checkbox"/>	✓ Rader, Jessica L.	Invitation	Will not attend	No
<input type="checkbox"/>	✓ Guest of Mrs. Jessica L. Rad...	Invitation	Registered	No-show
<input type="checkbox"/>	✓ Rader, Skyler A.	Invitation	Registered	Yes

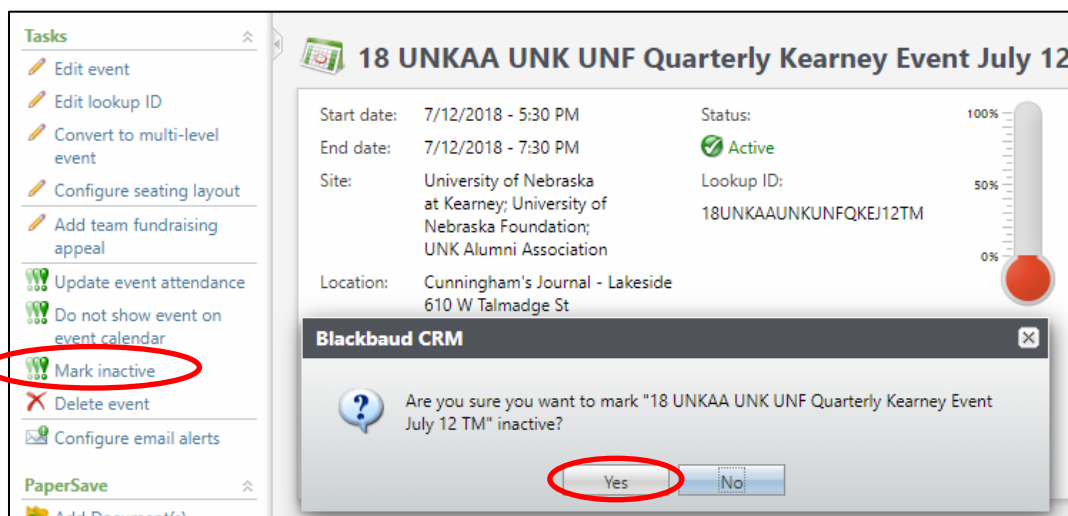
Marking the Event as Inactive

Once your event is complete and all your attendance, invoices, and other outstanding items are recorded, you are asked to inactivate historical events as the final step in the event process. The event record will still be searchable and remains in the system indefinitely, but it may disappear off the event calendar. (Users are reminded to change the filter setting to **Include inactive events** if necessary.)

EVENTS MANAGEMENT



1. Open the event record.
2. Under **Tasks** in the explorer bar at left, select **Mark inactive**.
3. Select **Yes** to inactivate the event record.



Event Seating

You can set up seating for any type of event and assign registrants to seats.

NOTES

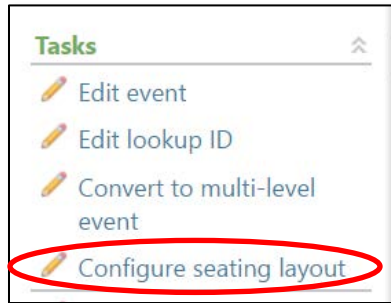
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Configure Seating Layouts

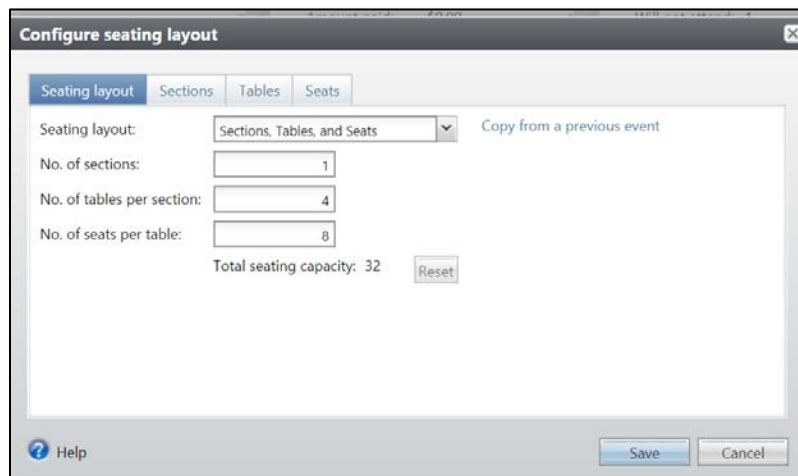
Before you can assign registrants to seats, you must define your seating layout.

To Configure a Seating Layout:

1. Open the event record.
2. On the explorer bar in the **Tasks** group, click **Configure seating layout**.

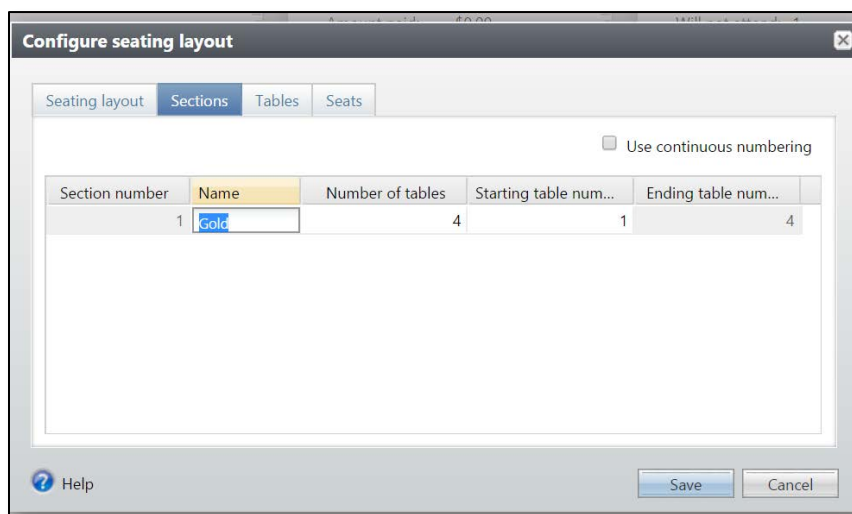


3. Click **Configure seating layout**.
 - a. On the **Seating layout** tab, you define the main structure of the seating arrangement.
 - i. In the **Seating layout** menu, select one of the following:
 - a. Sections, Tables, and Seats
 - b. Sections, Rows, and Seats
 - c. Sections and Seats
 - ii. Click the **Copy from previous event** link to open a search window to locate an event from which to copy a seating layout.
 - iii. Enter the number of sections, tables, rows, and/or seats in your seating layout.



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- b. On the **Sections** tab, you can name each section and specify the number of tables in each section.
 - i. Mark the **Use continuous numbering** checkbox to use the last table number of the previous section as the starting point for the next section. If you do not mark this checkbox, the first table in each section begins numbering with 1.
 - ii. In the **Name** column, enter a unique name for each section (optional).
 - iii. In the **Number of tables** column, you can modify the number of tables (or rows) as needed.
 - iv. In the **Starting table number** column, the starting number of the first table (or first row) of each section displays.
 - v. In the **Ending table number** column, the number of the last table (or last row) in each section displays.



- c. On the **Tables** or **Rows** tab, you can name each table or row and specify the number of seats in each table or row.
 - i. In the **Sections** menu, select the section to view.
 - ii. Mark the **Use continuous numbering** checkbox to use the last seat number of the previous table (or row) as the starting point for the next table (or row). If you do not mark this checkbox, the first seat at each table (or in each row) begins numbering with 1.
 - iii. In the **Name** column, enter a unique name for each table (or row).
 - iv. In the **Number of seats** column, the number of seats at each table (or in each row) appears in this column. Modify the number of seats as needed.

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- v. In the **Starting seat number** column, the starting number of the first seat at each table (or in each row) displays.
- vi. In the **Ending table number** column, the number of the last seat at each table (or in each row) displays.

Configure seating layout

Seating layout Sections **Tables** Seats

Sections: Gold Use continuous numbering

Table number	Name	Number of seats	Starting seat num...	Ending seat numb...
1	Table 1	8	1	8
2	Table 2	8	9	16
3	Table 3	8	17	24
4	Table 4	8	25	32

Help Save Cancel

- d. On the **Seats** tab, you can name each seat and view registrants assigned to specific seats.
 - i. In the **Section** menu, select the section to display table, row, or seat information.
 - ii. In the **Tables** menu, select the table (or row) to display seat information.
 - iii. In the **Name** column, enter a unique name for each seat (optional).
 - iv. In the **Assigned registrant** column, the name of the registrant assigned to the selected seat displays.

Configure seating layout

Seating layout Sections Tables **Seats**

Sections: Gold Tables: Table 1

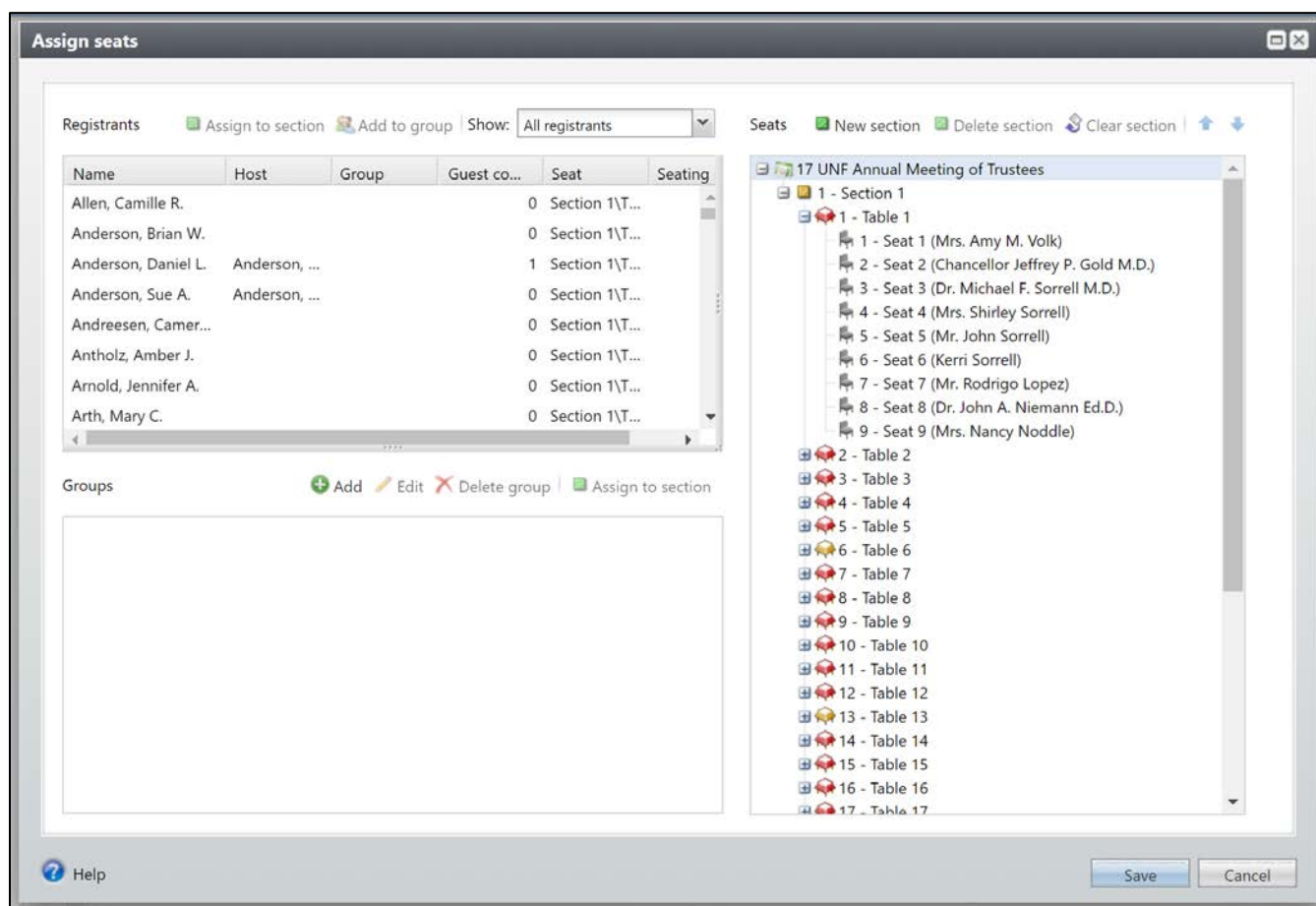
Seat number	Name	Assigned registrant
1	Seat 1	
2	Seat 2	
3	Seat 3	
4	Seat 4	
5	Seat 5	
6	Seat 6	
7	Seat 7	
8	Seat 8	

Help Save Cancel

- 4. Click **Save**.

Assign Seats

Once you configure a seating layout for an event, you can assign registrants to seats.



The **Registrants** frame displays the names of the registrants (including guests) you added to the event on the **Registrants** tab of the event record.

The **Groups** frame displays any groups of registrants.

The **Seats** frame displays each section in your seating layout.

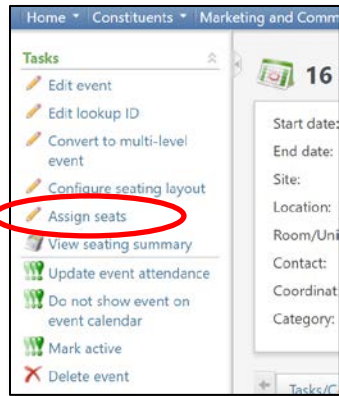
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Assign Registrant to a Seat

To Assign a Registrant to a Seat:

1. Open the event record.
2. On the explorer bar under the **Tasks** group, click **Assign Seats**.



3. In the **Registrants** frame, select the registrant to seat.
4. In the **Seats** frame, select the seat, table, row, or section to assign the registrant.
5. In the **Registrants** frame, click **Assign to seat**.

Note: You can also drag the name of the individual over to the seats frame and it will place that person in the seat you have selected.

6. Once you are finished assigning registrants to seats, click **Save**.

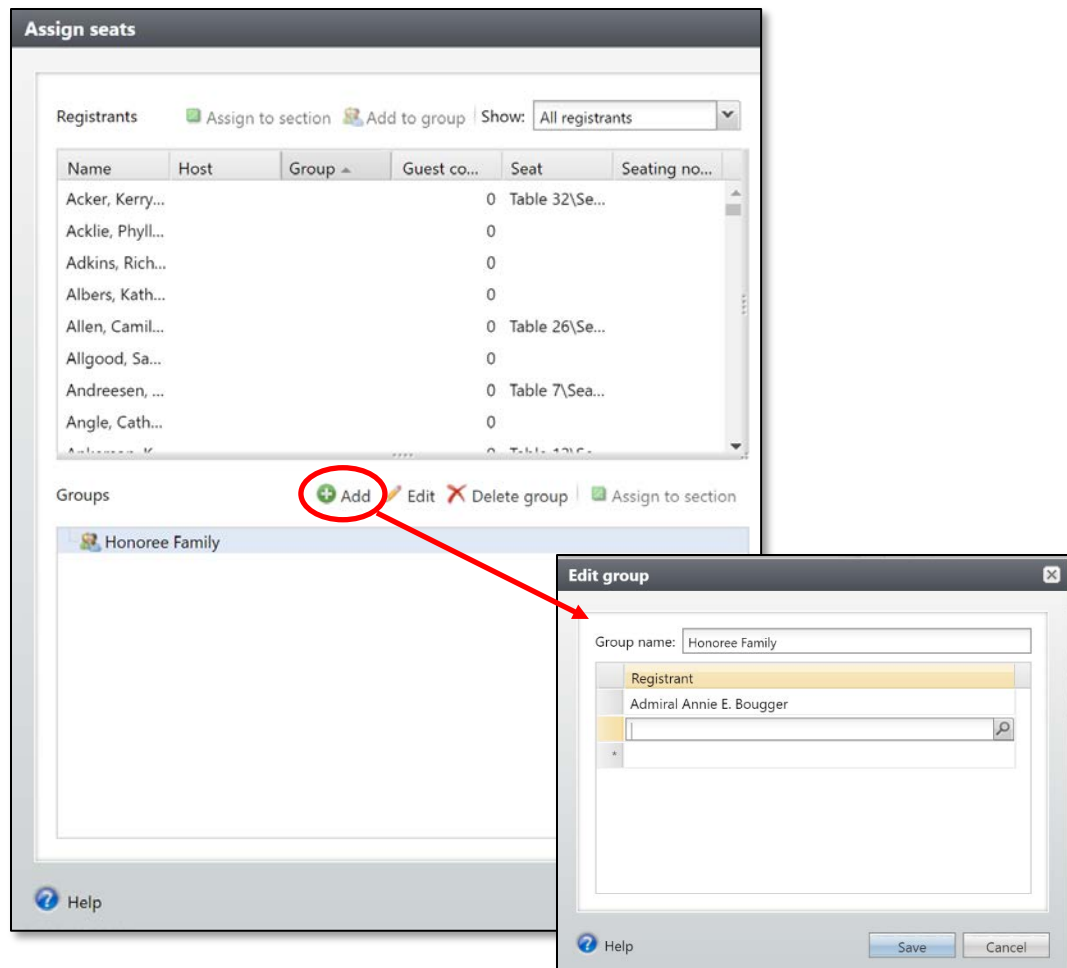
Add Seating Groups

In the **Groups** frame of the seating window, you can create groups of constituents who wish to be seated together.

To Add a Seating Group:

1. Open the event record.
2. On the explorer bar, in the **Tasks** group, click **Assign Seats**.
3. Locate **Groups** frame.
4. Click **Add**.

EVENTS MANAGEMENT



5. Enter a name to identify the group. *Example: students, honoree table, etc.*
6. In the **Registrant** field, click the magnifying glass to open the registrant search window.
Note: Rather than searching for the registrant, you can type the registrant's name in the field and it will link back to the registrant.

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Registrant Search

Last/Org name:

First name:

Lookup ID:

Results

Registrant	Host	Attended	Number of guests	Lookup ID
------------	------	----------	------------------	-----------

Help

7. Search for the registrant to add to the group and click **Select**.
8. Click **Save**.

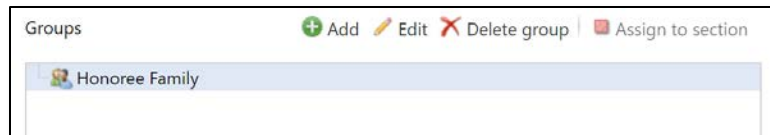
Assign Groups to Seats

In the **Groups** frame of the seating window, you can quickly assign an entire group to seats at a table or a row in a section.

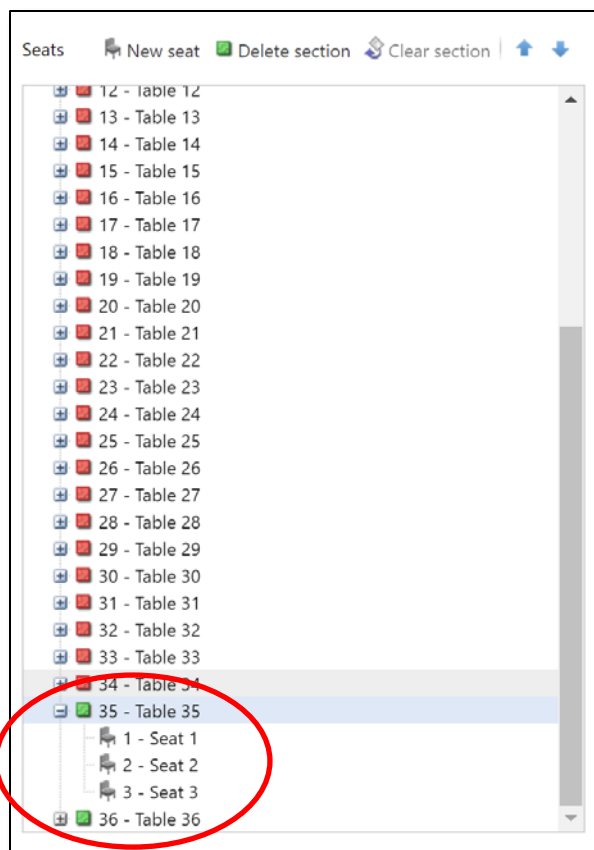
To Assign a Group to Seats:

1. Open the event record.
2. On the explorer bar, click **Assign Seats**.
3. In the **Groups** frame, select the group to seat.

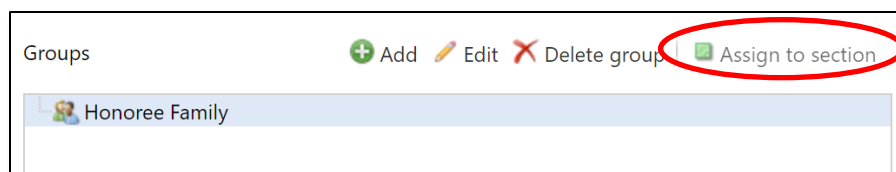
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4. In the **Seats** frame, select the section, table or row to assign to the group.



5. In the **Groups** frame, click **Assign to section**.

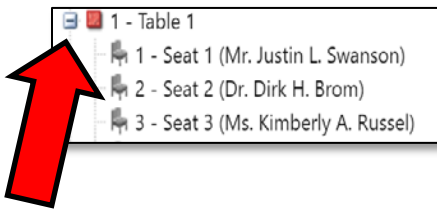


6. Once you are finished assigning groups to seats, click **Save**.

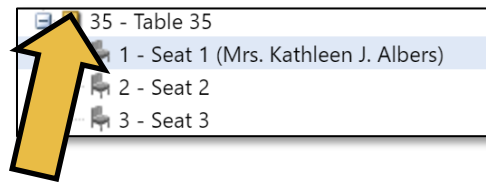
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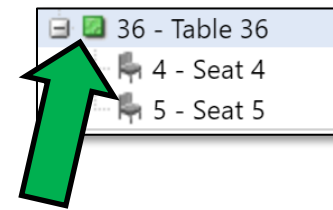
Red box: table full



Yellow box: partial table



Green box: open table



Event Documentation

Documentation Overview

Please refer to the **Guide** appended at the end of the Events Management training manual for instructions on how to save event documentations that include:

- **Event Documentation:** Planning notes, floorplans/layouts, facility information, and contracts;
- **Printed Materials:** Save-the-dates/invitations, programs, signage, and other printed event materials;
- **Expenses:** Event estimates, invoices, receipts and orders.

Event Reporting

Event reports allow you to view information about your events and seating plans.

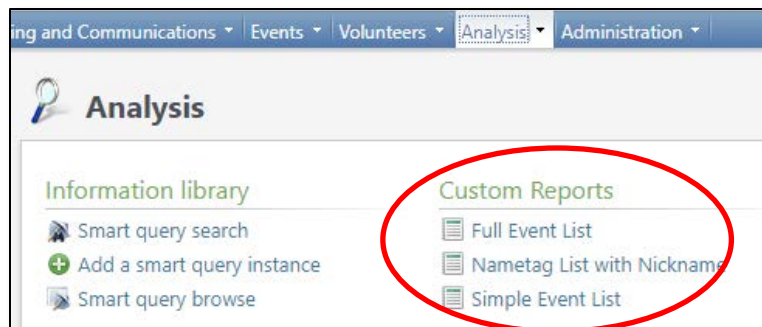
Event Registration Lists and Nametags

You can create a registration list of attendees to utilize at your event, to create nametags, for seating lists, etc. The specific report titles are listed below.

To Create an Event list:

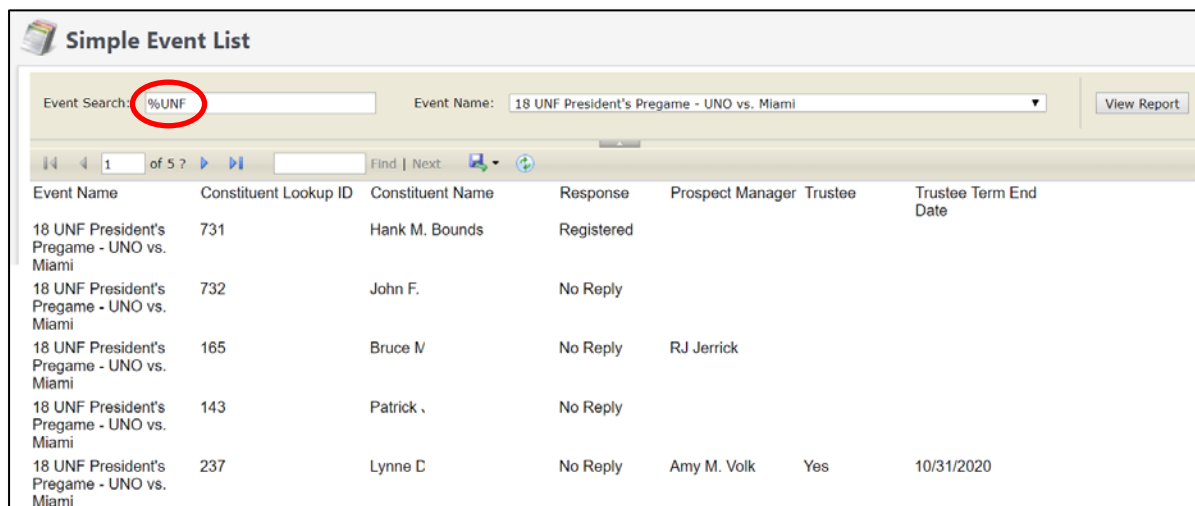
1. Click on the **Analysis** functional area on the [blue navigation bar](#).

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2. Under **Custom Reports** select the report needed:

- a. **Full Event List** – This comprehensive report includes all registrant information including first name, last name, response, address, phone, email, dietary restrictions, table numbers, etc.
- b. **Nametag List with Nickname** – This report can be utilized when needing to make event nametags and includes first name, nickname, last name, response, table number, etc.
- c. **Simple Event List** – This abbreviated report includes all registrant information, including Lookup ID, Constituent Name, Response, Prospect Manager, Trustee, and Trustee Term End Date.
 - **Tip:** When running this report, enter a % in front of the keyword you wish to search for in the **Event Search** field, then press the **Tab** key on the keyboard. The list of events will appear in the **Event Name** field; choose the appropriate event and click **View Report**.

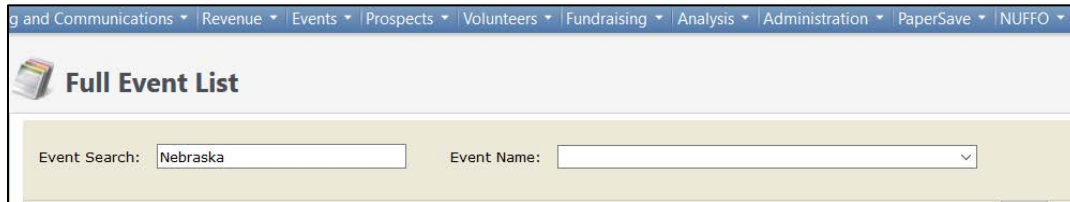


Event Name	Constituent Lookup ID	Constituent Name	Response	Prospect Manager	Trustee	Trustee Term End Date
18 UNF President's Pregame - UNO vs. Miami	731	Hank M. Bounds	Registered			
18 UNF President's Pregame - UNO vs. Miami	732	John F.	No Reply			
18 UNF President's Pregame - UNO vs. Miami	165	Bruce M	No Reply	RJ Jerrick		
18 UNF President's Pregame - UNO vs. Miami	143	Patrick .	No Reply			
18 UNF President's Pregame - UNO vs. Miami	237	Lynne D	No Reply	Amy M. Volk	Yes	10/31/2020

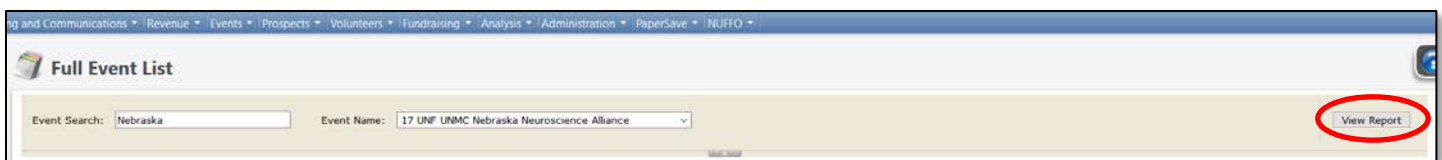
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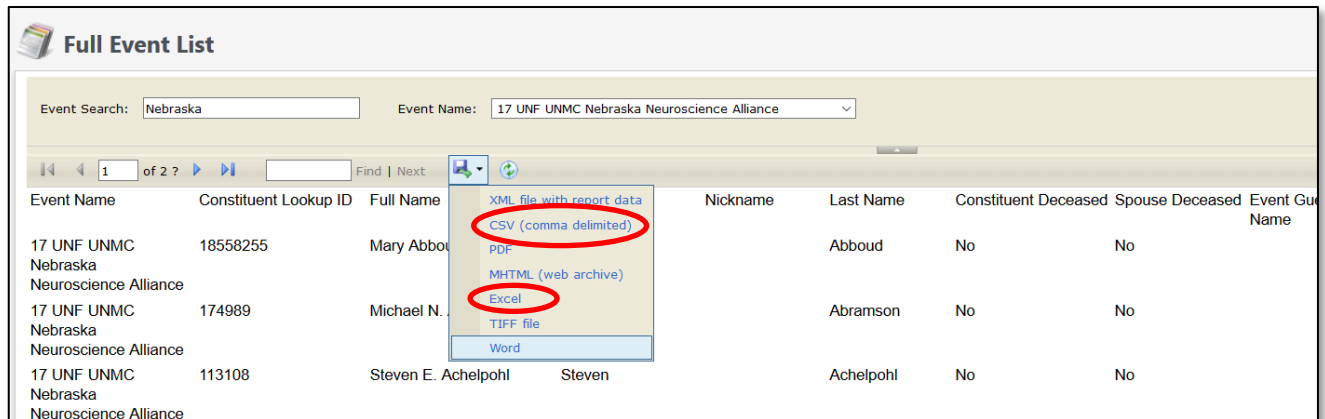
3. A new window will open. Type in the name of the event in the **Event Search** field, or a key word in the event name and hit **enter**.



4. Then from the drop down menu in the **Event Name** field, select the event for which to pull the custom report, and click **View Report** located on the far right side.



5. The event report will generate in the screen below.
6. Click the blue disk icon to export the report and select the preferred file type. (CSV or Excel are recommended.)



7. Choose where to save and what to name your export file. Manipulate the exported file and/or prepare its use as a mail merge datasource as needed.

Event Profile Report

With the **Event profile** report, you can view information about an event.

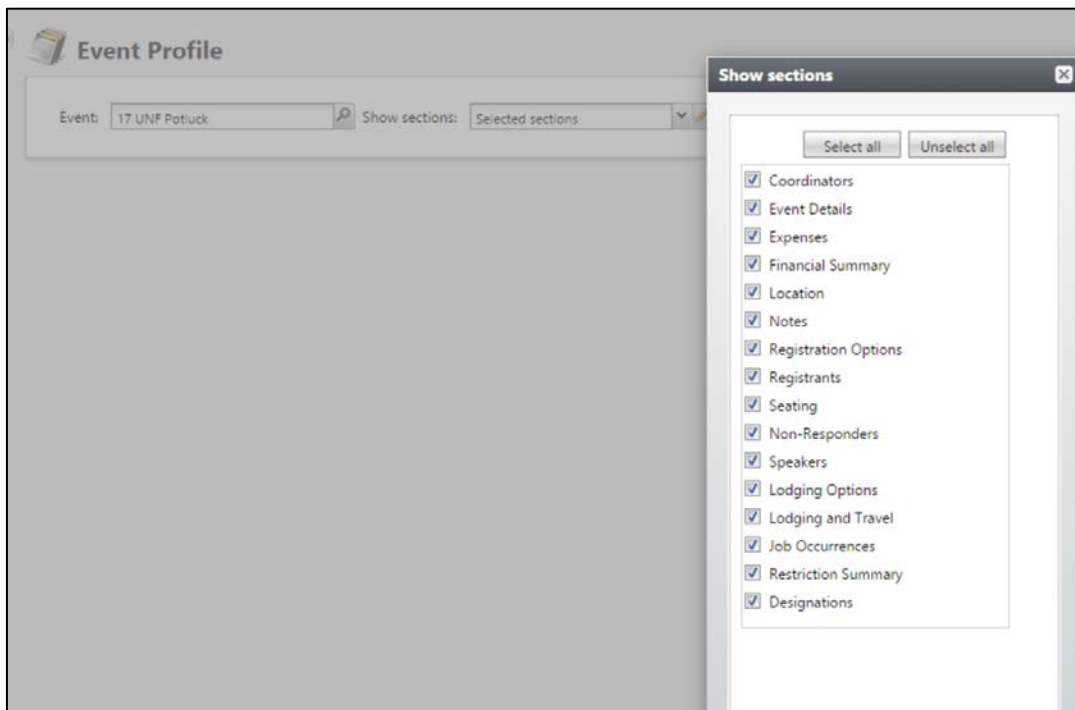
To View an Event Profile Report:

1. Open the event record.
2. On the explorer bar (at left) in the **Reports** task group, click **Event profile**.

EVENTS MANAGEMENT



3. In the **Event** field, search for and select the event on which to report.
4. In the **Show sections** field, select whether to include **All sections** or **Selected sections**.
5. If you choose **Selected sections**, mark the checkboxes next to the sections of information to include in the report.



6. Click **View report**.

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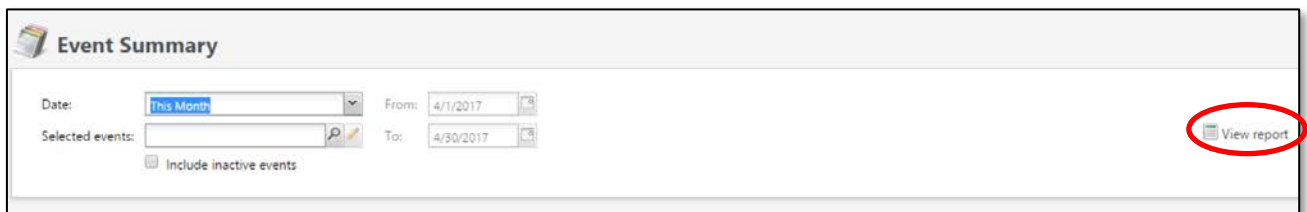
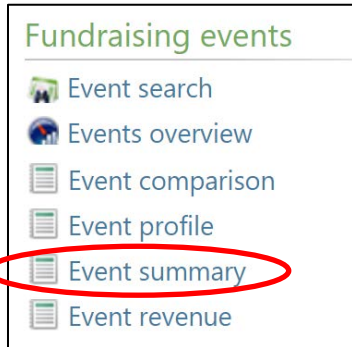
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Event Summary Report

With the **Event Summary** report, you can view information about one or more events.

To View an Event Summary Report:

1. On the [blue navigation bar](#), click **Events** to navigate to the Events functional area.
2. In the **Fundraising events** task group, click **Event summary**.



3. In the **Date** field, select the date range for events to include.
4. In the **Selected events** field, search for and select a query selection of events to include.
5. Click **View report**.

Event Seating Summary Report

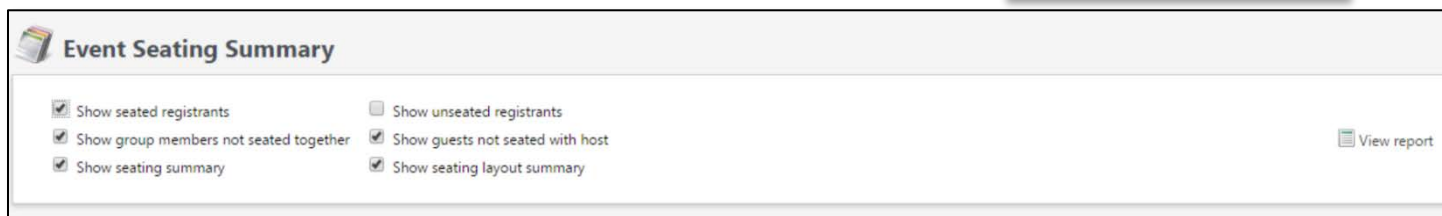
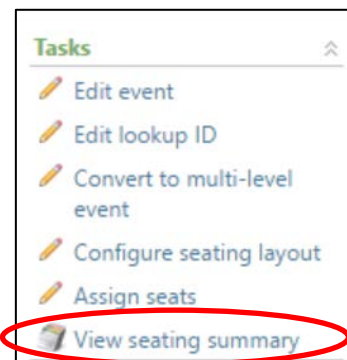
With the **Event Seating Summary** report, you can view information about how you seated registrants for an event.

You can run this report to display:

- Seated registrants.
- Group members not seated together.
- A seating summary.
- Unseated registrants.
- Guests not seated with their host.
- A seating layout summary.

To View an Event Seating Summary:

1. Open the event record.
2. On the explorer bar (at left) in the **Tasks** group, click **View seating summary**.
3. Mark the checkboxes next to the sections to include in the report.
4. Click **View report**.



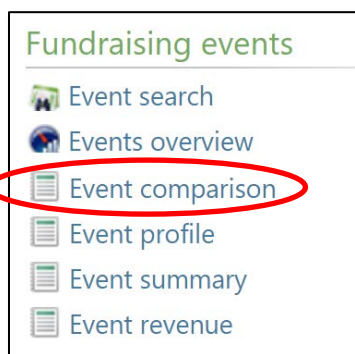
Event Comparison Report

With the **Event Comparison** report, you can compare the effectiveness of multiple events.

The **Event Comparison** report includes information about the performance of the events and displays the total number of registrants, attendees, expenses, and the gross and net amounts raised for each event.

To View an Event Comparison Report:

1. On the [blue navigation bar](#), click **Events** to navigate to the Events functional area.
2. In the **Fundraising events** task group, click **Event comparison**.



3. In the **Event 1** field, search for and select the first event.

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- In the **Event 2** field, search for and select the second event.

- If you want to compare events included in a selection, choose **Selection** and then search for and choose the selection.
- Click **View report**.

Event Revenue Report

With the **Event Revenue** report, you can view revenue information for your event.

To View an Event Revenue Report:

- Open the event record.
On the explorer bar in the **Reports** task group, click **Event revenue**.



- If you want to include sub-events, mark the **Include sub-events** checkbox.
- Click **View report**.



Summary

- You follow a process to set up events. First, search for the event in your database. If the event is not already in the database, you set up a new event. Next, you send event invitations and register attendees for the event. Then, you configure a seating layout for the event and assign attendees to seats. After the event you mark actual attendance. Last, you can report on the event, and will mark it inactive.
- When you set up an event, you identify the location, supporting events, coordinators, tasks, registration options, preferences, and expenses for the event.
- When you register a constituent for an event, you indicate how many guests he or she is bringing and you record registration options for the registrants.
- Use invitations to create lists of invitees for events, and manage invitation statuses for each invitee in a list. You can also run automatic invitation processes to record that invitations were sent and create an export file.
- You can create a seating layout for any event and assign participants to seats.
- Event reports allow you to view information about your events and seating plans.

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Supplemental Reference Guide for University Users:

EVENT DOCUMENTATION – HOW TO ATTACH FILES IN ALI

Authoring Department: DONOR RELATIONS AND STEWARDSHIP – EVENTS

Contact: ANNIE BOUGGER
ANNIE.BOUGGER@nufoundation.org

Anticipated Audience(s): UNIVERSITY EVENTS MODULE USERS

Version 1.0 – last updated 6/13/2017

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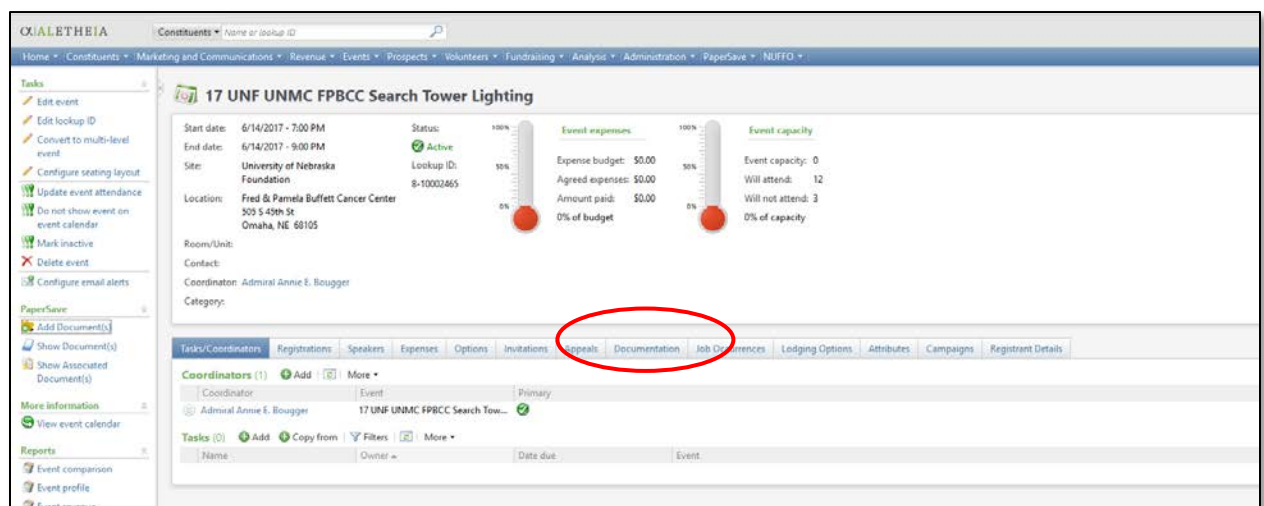
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Where to find the Documentation tab on the event	2
Types of Events-Related Documents to be Saved	2
UTILIZING DOCUMENTATION TAB FOR EVENTS.....	3
Preparing Documents	3
How to Save and Attach Documents.....	3
How to View Saved Documents.....	5
How to Delete an Event Document	7

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

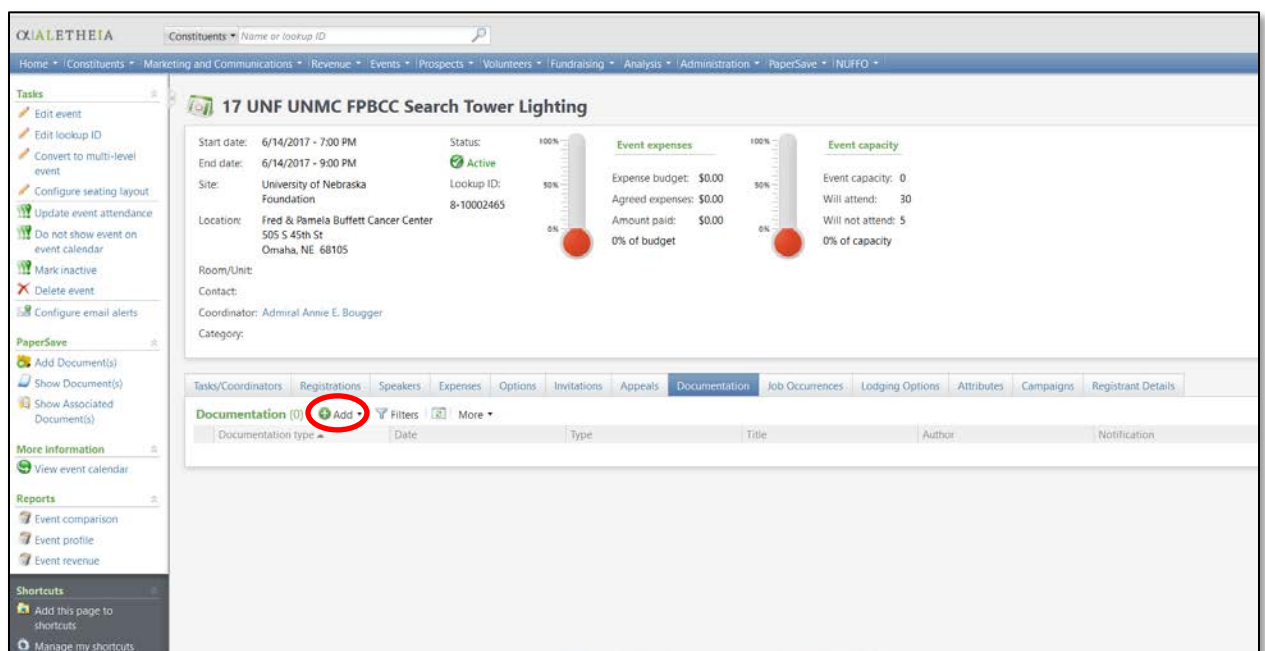
UTILIZING DOCUMENTATION TAB FOR EVENTS

Preparing Documents

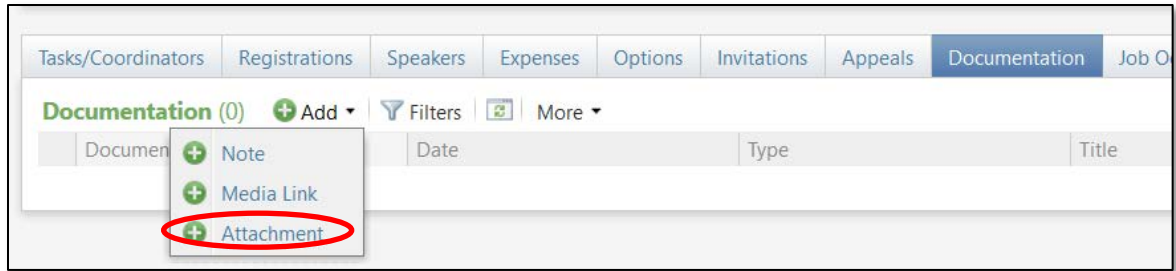
1. Before utilizing the event **Documentation** tab, all documents you would like to add must be scanned and/or saved either on your desktop or within your computer/folder system in a place to which you will be able to browse and add an attachment.
2. Acceptable file types include PDF, Microsoft Word (.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

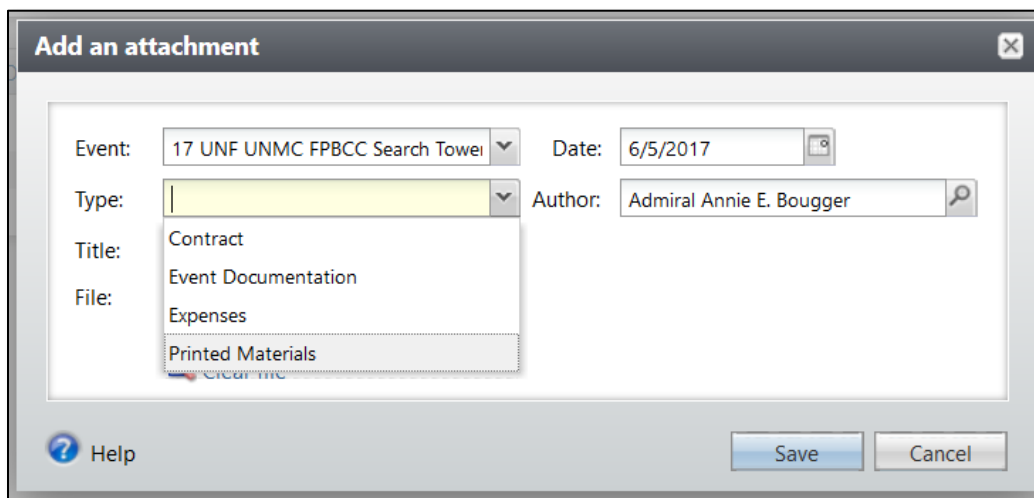
1. After opening the event record, navigate to the **Documentation** tab. Click **Add**.



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.



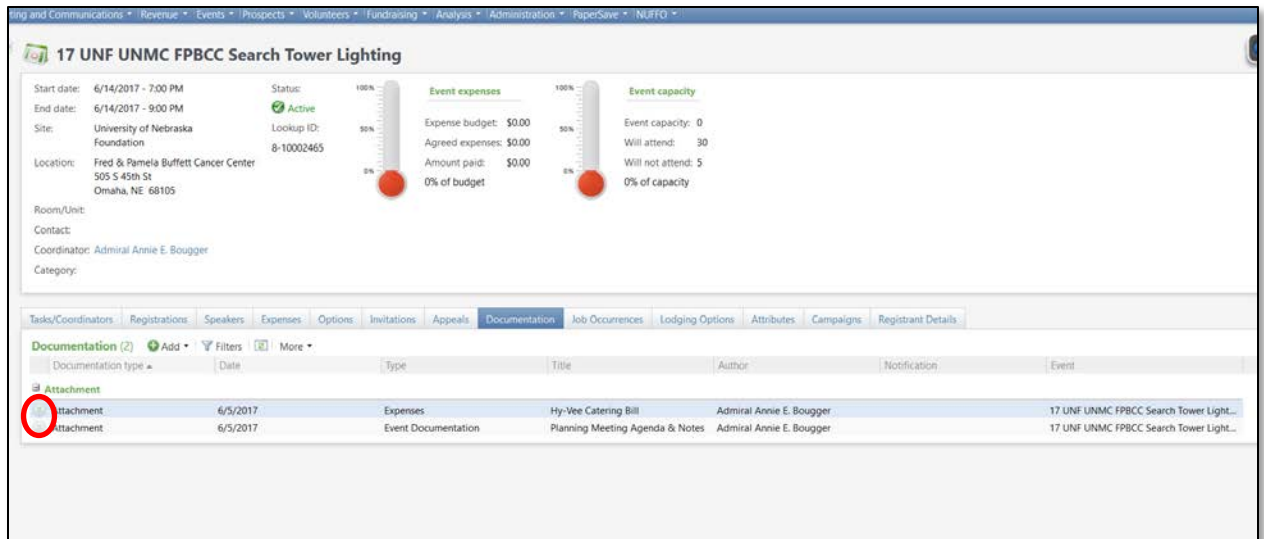
5. In the field labeled **Title**, enter a description of the document. For example, if you have selected the type of **Expenses** and are attaching a bill from the caterer, the text you would type in the title category may resemble: *Hy-Vee Catering Bill*.
6. After entering a description, select the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

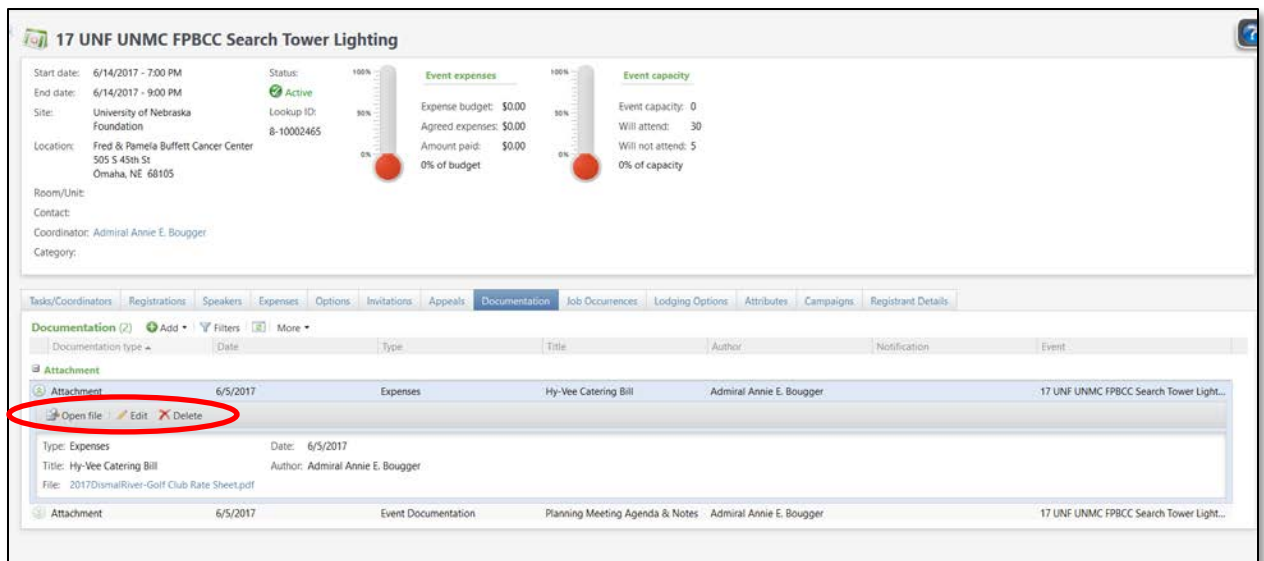
How to View Saved Documents

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

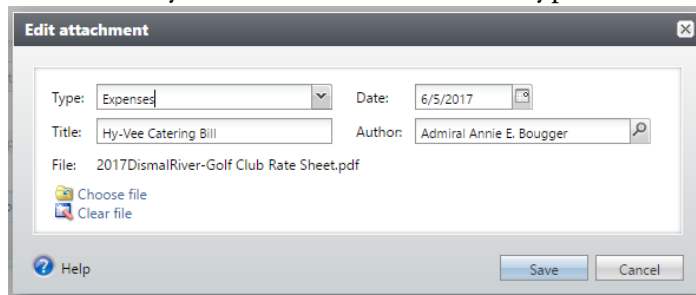
2. Any documents saved to the event will show under **Attachment**.



- 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.



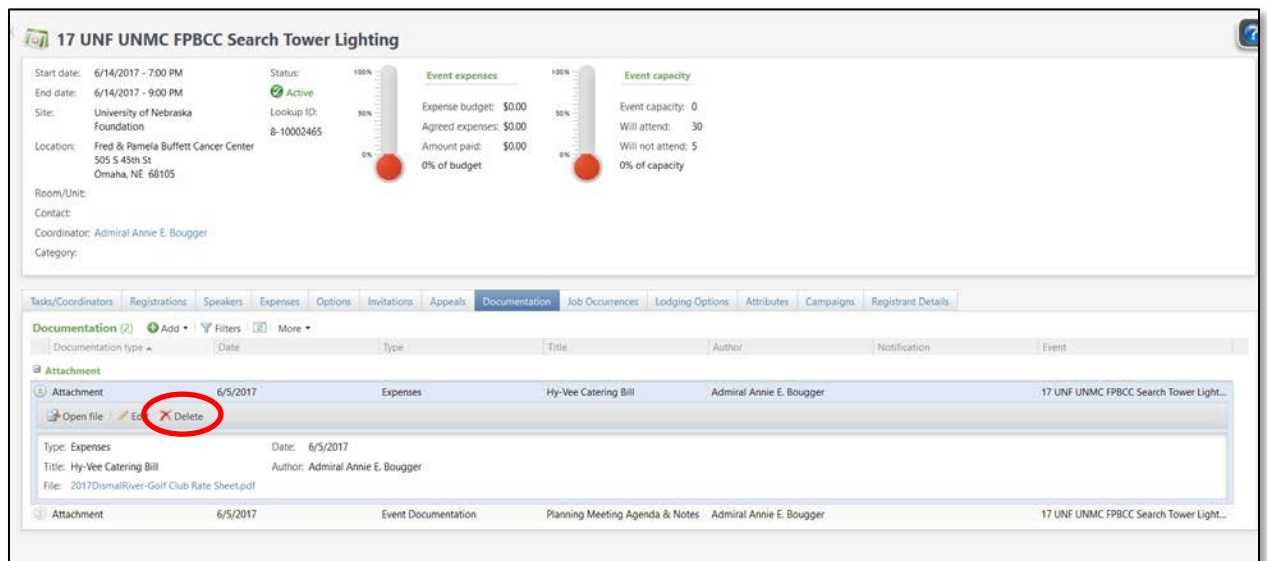
- Open file:** Opens the attached file.
- Edit:** Allows you to edit the attachment (Type, Title, Date, File, etc.).



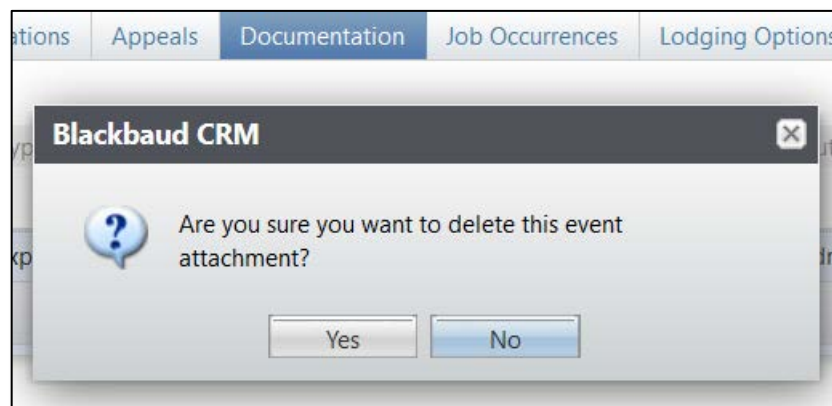
- Delete:** Allows you to delete the attachment.

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.



Guide for:

IMPORTING A SELECTION

Authoring Department: ADVANCEMENT SERVICES
 Contact: JESSIE RADER
 JESSIE.RADER@nufoundation.org

Anticipated Audience(s): ADVANCEMENT SERVICES
 EVENTS MANAGEMENT (INTERNAL/EXTERNAL)
 MARKETING COMMUNICATIONS (INTERNAL/EXTERNAL)
 DONOR RELATIONS
 DEVELOPMENT ASSISTANTS (GENERAL CORRESPONDENCE)

Version 1.0 – last updated 03/30/2017

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Adding an Imported Selection

For instances in which a data set is not in *Ali* we can import the data set into a selection to be used within a CRM function that uses selections, such as **Queries** or **Events**.

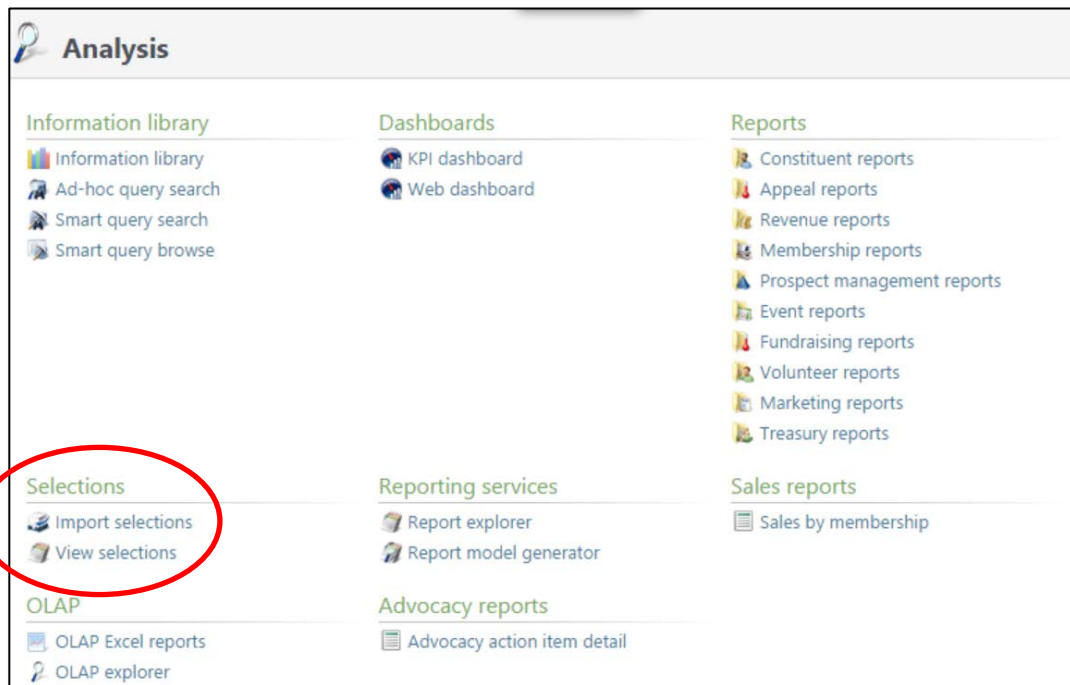
Steps to importing

1. Navigate to the **Analysis** functional area in the [blue navigation bar](#).
2. Click on the **Import selections** under the **Selections** area.
3. Click **Add**.
4. Populate the following fields:
 - a. **Name:** please follow the selection naming conventions as outlined in the [Supplemental Reference Guide Naming Conventions and Standards](#).
 - b. **Description:** All queries must have a description. The **Description** should contain:
 - Retention requirements
 1. If it is used for a [business process](#), the retention should be **Permanent**.
 - a. If it is for a Process in *Ali* indicate what that is – Reminders, Receipts, etc.
 2. If it is for a [specific project](#), indicate a date in the future when you believe the project will be complete and the query can be deleted.
 - a. Description of the project the query is related to.
 - c. **Record Type:** This is dependent on the type of selection you are importing.
 - For example, if you have constituent IDs and need a constituent selection you'd select the *record* type of constituent.
 - d. **Category:** Select “Import”.
5. Optional Fields
 - a. **Site:** if you use Site then it is restricted to processes with a matching site.
 - b. Show this selection in the **Query Designer:** only choose this if you need the selection available in an ad-hoc query. This does not need to be selected if you plan to use the imported selection in a process.
 - Example: Do not select this for a selection import that will be used in an event.
6. Choose the **Import File**.
 - a. **Note:** the file must be a CSV.
7. Select the **ID column**.
8. Select the **ID type** that relates to the ID in the ID column.

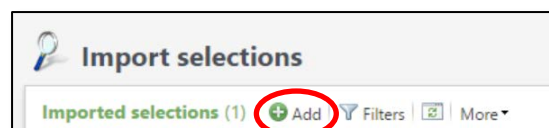
9. Click **Save** and **Import**.
10. Confirm the number processed matches your intended results.
 - a. **Note:** if the numbers do not match, check your CSV for duplicate ID numbers.

Steps to importing with visuals

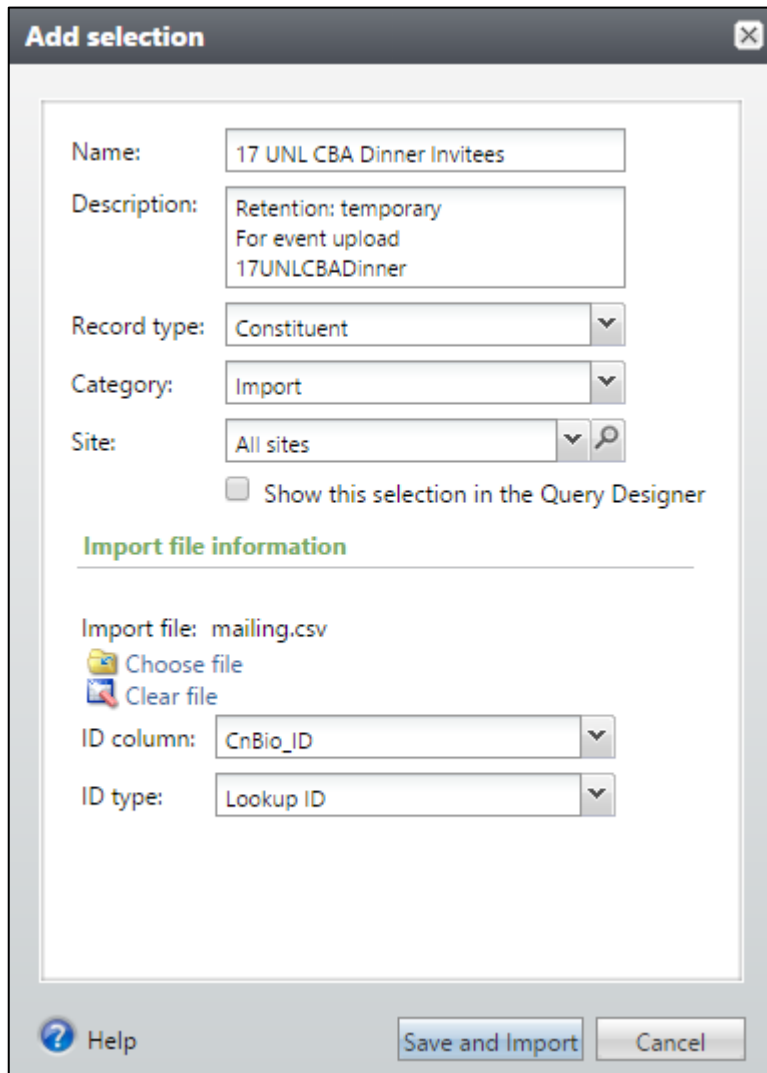
1. Navigate to the **Analysis** functional area in the [blue navigation bar](#).



2. Click on **Import selections** under the **Selections** area.
3. Click **Add**.



4. Populate the following fields:



5. Optional Fields

- a. **Site.**
- b. Show this selection in the Query Designer.

6. Choose the **Import File.**

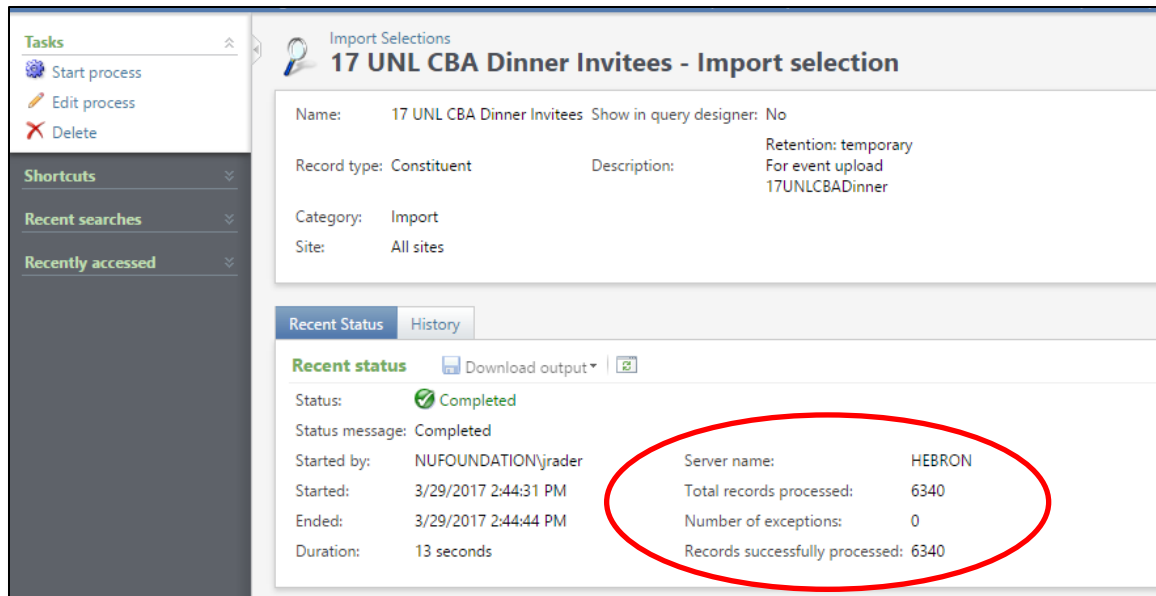
7. Select the **ID column.**

8. Select the **ID type** that relates to the ID in the ID column.

9. Click **Save and Import.**

10. Confirm the number processed matches your intended results.

- a. **Note:** if the numbers do not match, check your CSV for duplicate ID numbers.



Deleting an imported selection

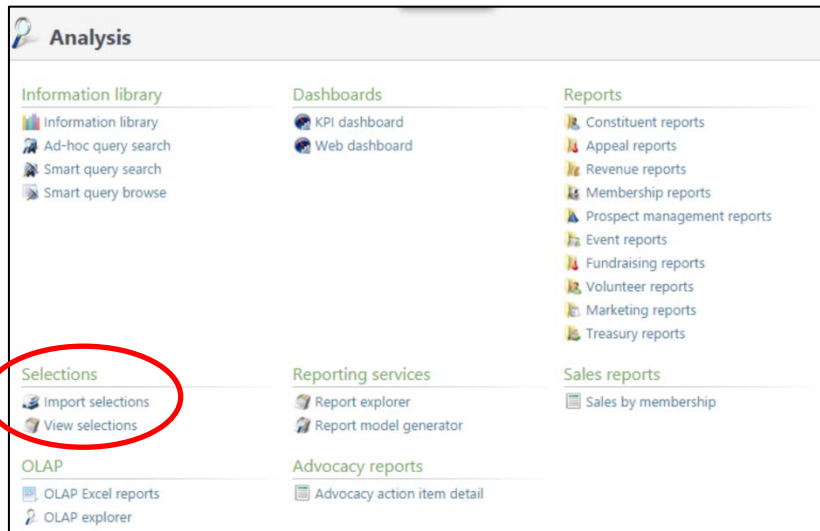
Once your imported selection is no longer needed, please delete the selection.

Steps to deleting

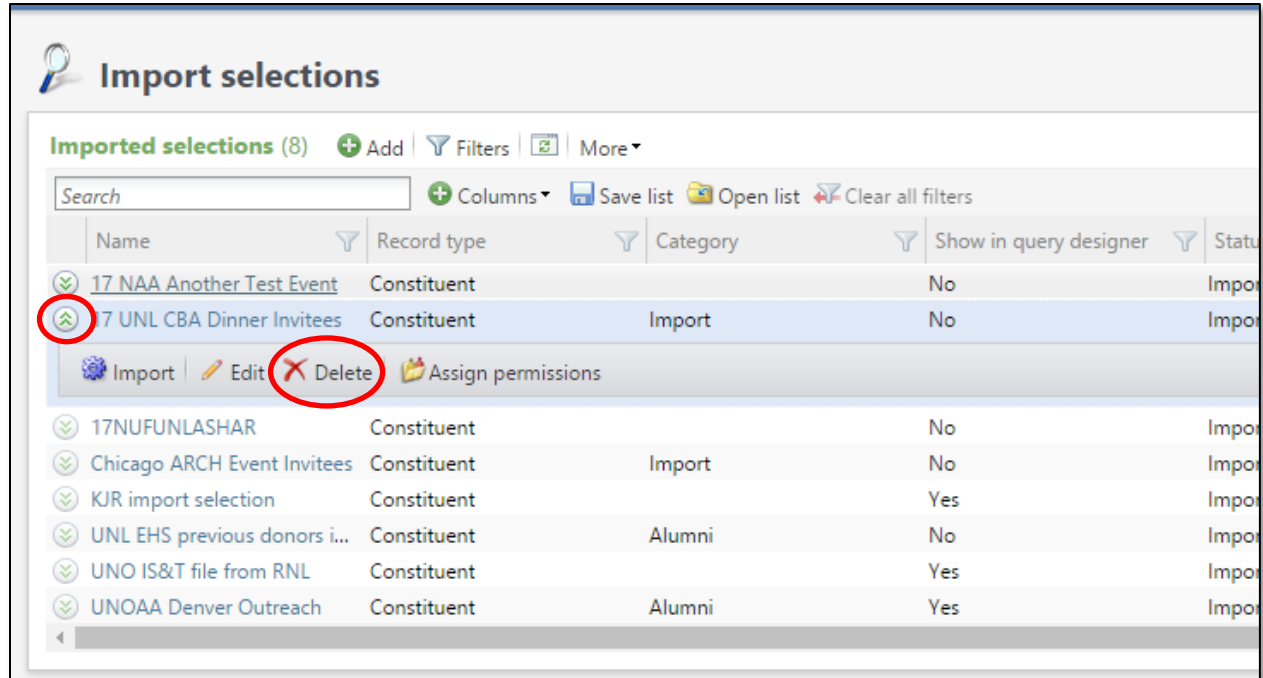
1. Navigate to the **Analysis** functional area.
2. Click on **Import selections** under the **Selections** area.
3. Expand the details under the selection by using the expand icon.
4. Click **Delete**.

Steps to deleting with visuals

1. Navigate to the **Analysis** functional area.



2. Click on **Import selections** under the **Selections** area.
3. Expand the details under the selection by using the double down.
4. Click **Delete**.



Supplemental Reference Guide for:

**SMART QUERY:
EVENT REGISTRANT EMAILS**

Authoring Department: ADVANCEMENT SERVICES
 Contact: CHRISTINA PROVOST
 CHRISTINA.PROVOST@nufoundation.org
Anticipated Audience(s): ALL

Version 1.0 – last updated 09/05/2017

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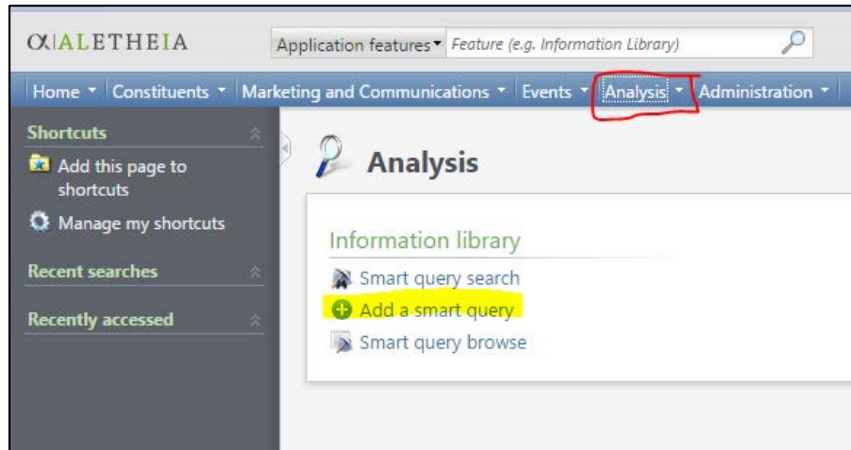
Event Registrant Emails 2
 Running the Smart Query:..... 2

Event Registrant Emails

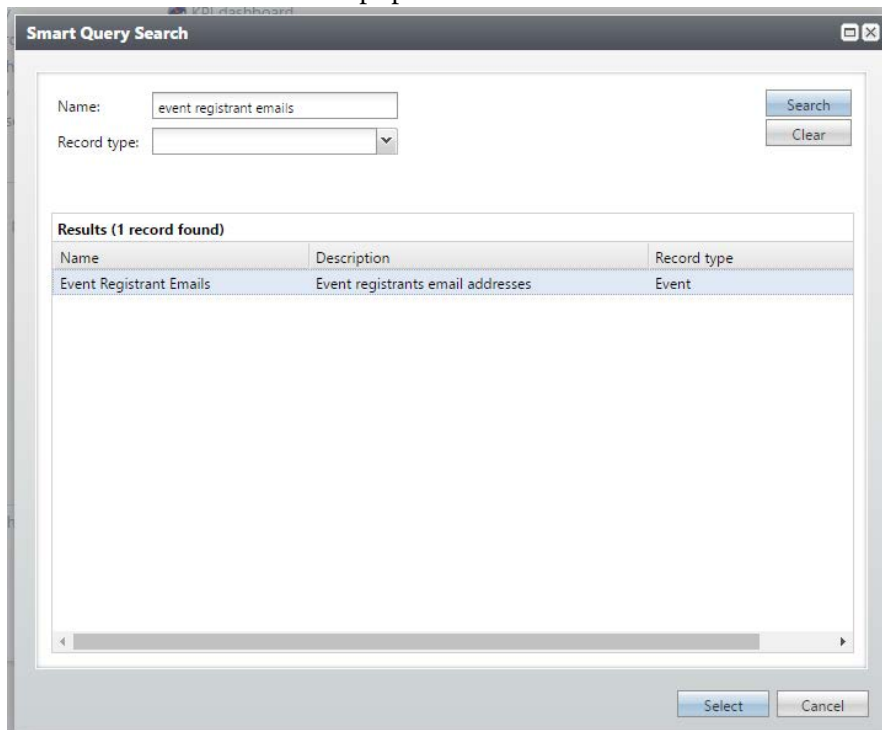
This smart query allows you to view the registrants' emails for a particular event. It removes those that are marked do not email. The purpose of this smart query is to allow you to communicate with event registrants via email outside the Ali CRM system.

Running the Smart Query:

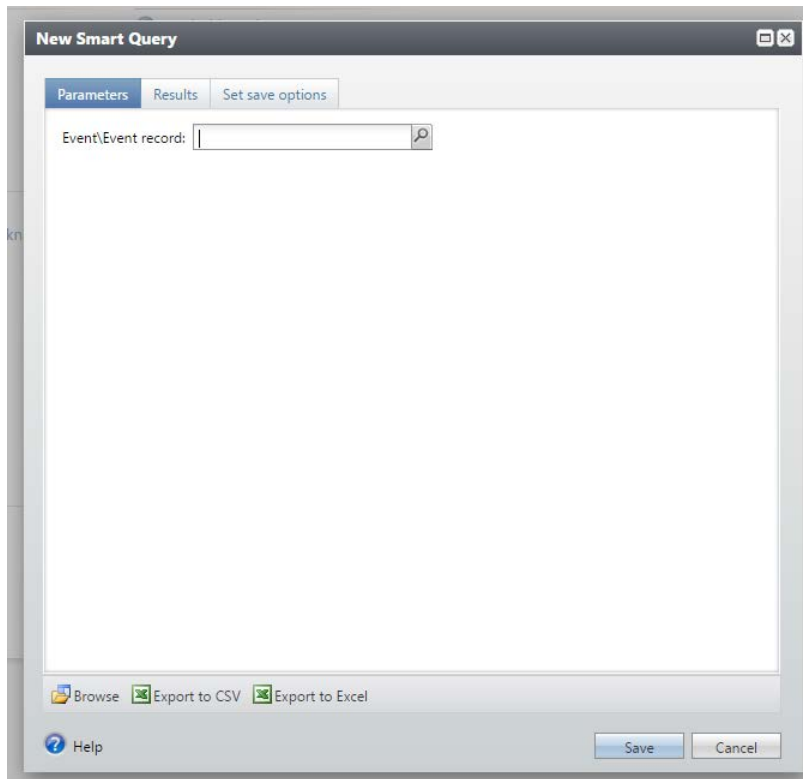
1. Go to the **Analysis** functional area and select **Add a smart query**.



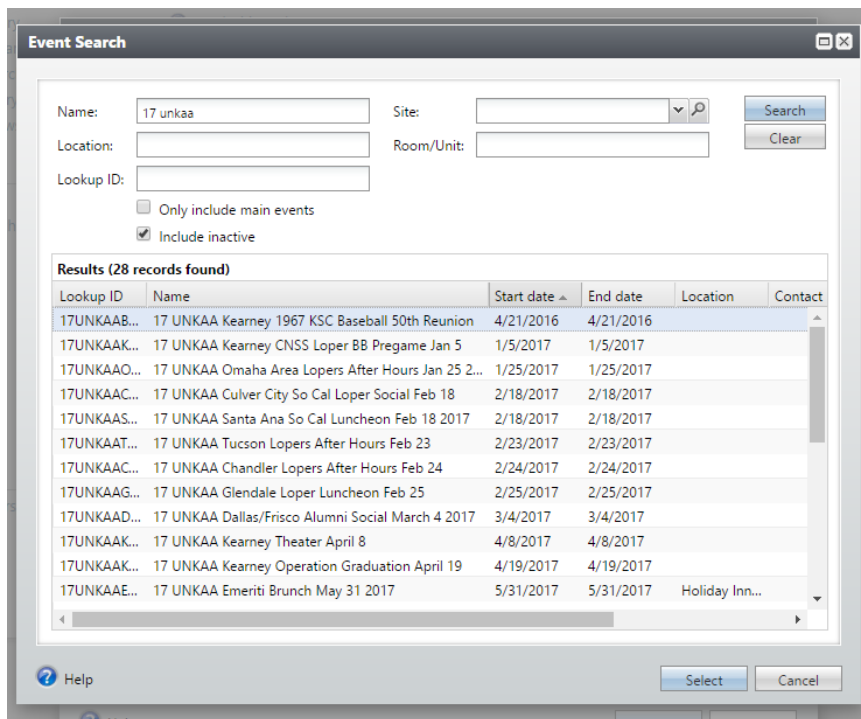
2. In the **Smart Query Search** box, enter **Event Registrant Emails** in the **Name** field and click **Search**. Once the results are populated, click **Select**.



3. Enter the event name or partial name and click search.



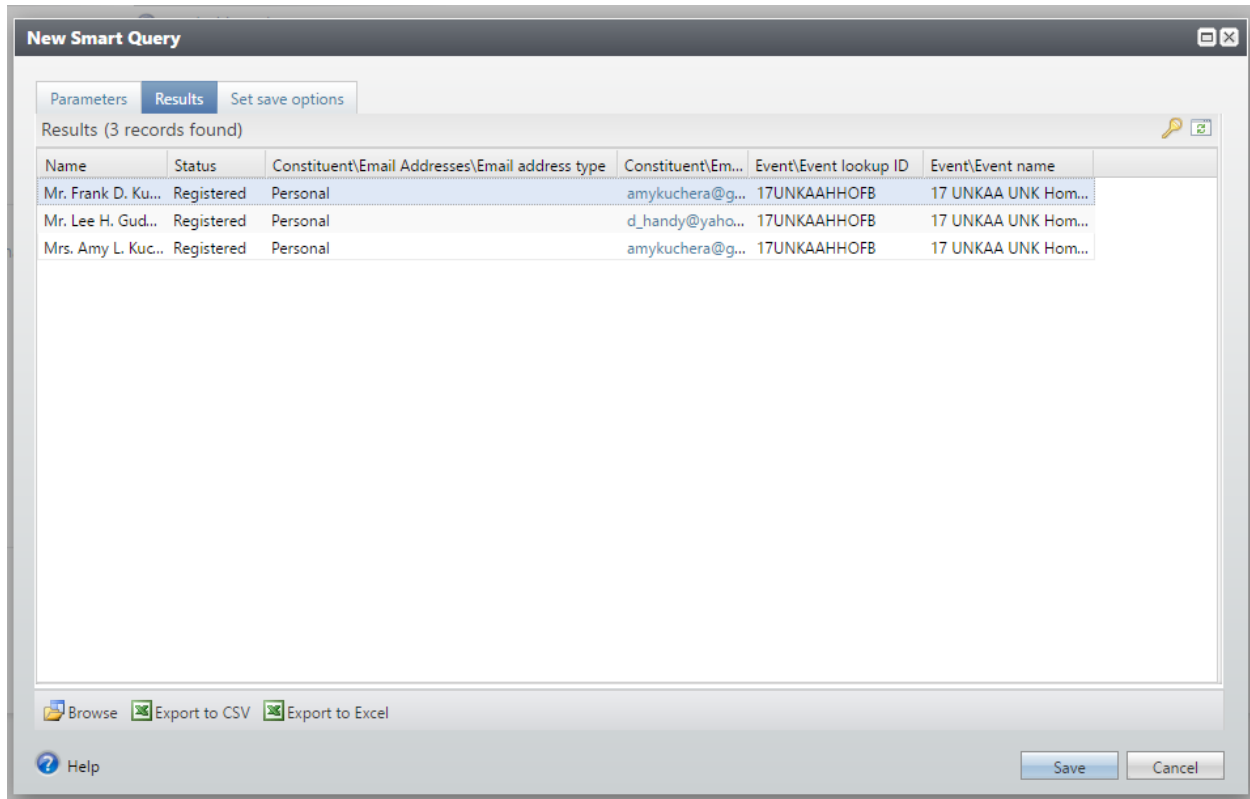
4. Select the event that you need.



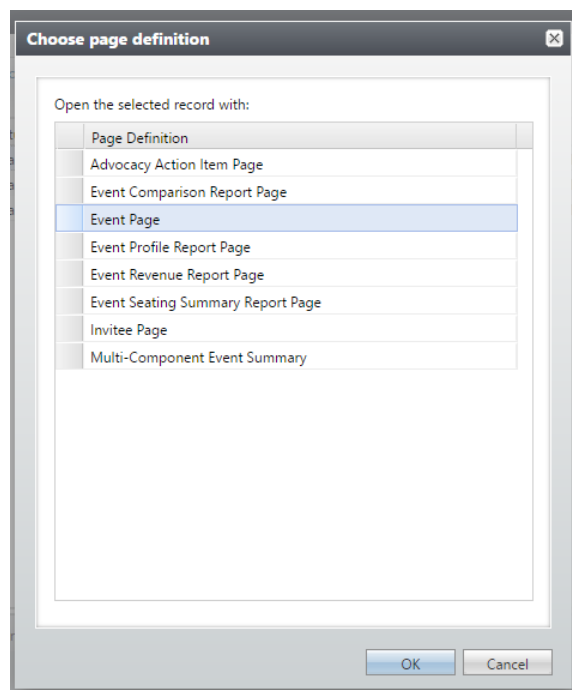
SMART QUERY:
EVENT REGISTRANT EMAILS

[jump to top](#)

5. Click the **Results** tab.



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



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

The screenshot displays the ALI CRM interface for an event titled "17 UNKAA UNK Homecoming Athletics Hall of Fame Dinner Sept 15". The event details include:

- Start date:** 9/15/2017 - 5:30 PM
- End date:** 9/15/2017 - 10:00 PM
- Status:** Active
- Site:** University of Nebraska at Kearney, University of Nebraska Foundation, UNK Alumni Association
- Lookup ID:** 17UNKAAHHOFB
- Locations:** UNK Nebraska Union, 1013 W 27th St, Kearney, NE 68849
- Room/Unit:** Ponderosa
- Contact:** Mrs. Marcia L. Gugelman
- Coordinator:** Mrs. Tricia M. Darburg
- Category:** UNKAA

Financial metrics are shown as progress bars:

- Event expenses:** Expense budget: \$0.00, Agreed expenses: \$0.00, Amount paid: \$0.00, 0% of budget.
- Event capacity:** Event capacity: 0, Will attend: 10, Will not attend: 0, 0% of capacity.

Below the event details is a navigation bar with tabs: Tasks/Coordinators, Registrations, Speakers, Expenses, Options, Invitations, Appeals, Documentation, Job Occurrences, Lodging Options, Attributes, Campaigns, Registrant Details. The "Coordinators" tab is active, showing a list of coordinators with columns for Name, Event, and Primary. A single coordinator is listed: Mrs. Tricia M. Darburg for the event "17 UNKAA UNK Homecoming Ath...".

At the bottom, a "Browse query results" window is open, displaying a table of records:

Name	Status	Constituent Email Address(es)	Constituent Email Address(es)	Event/Event lookup ID	Event/Event name
Mr. Frank D. Kuchera	Registered	Personal	amykuchera@gmail.com	17UNKAAHHOFB	17 UNKAA UNK Homecoming Athletics Hall of Fame Dinner Sept 15
Mr. Lee H. Gudmundson	Registered	Personal	vl_handy@yahoo.com	17UNKAAHHOFB	17 UNKAA UNK Homecoming Athletics Hall of Fame Dinner Sept 15
Mrs. Amy L. Kuchera	Registered	Personal	amykuchera@gmail.com	17UNKAAHHOFB	17 UNKAA UNK Homecoming Athletics Hall of Fame Dinner Sept 15

- 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**.

6. Once you've finished reviewing your results, cancel out of the New Smart Query without saving.