

# 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.

# **EVENTS MANAGEMENT**

**V2.0 – SUMMER 2018** 

# TABLE OF CONTENTS

EVENTS MANAGEMENT	
Lesson Objectives	
What Constitutes an Advancement Event?	4
Event Process	4
Events Page	5
Event Search	5
The Event Record	7
Add a New Event	9
Event Registration Setup	15
Add Registration Preferences	
Add Event Coordinators	
Add Event Tasks	
Add Lodging Locations	
Add Event Speakers	
Add/Track Event Budget & Expenses	
Setting up Multi-Level Events	
Event Summary Record	
Event Invitations	
Create the Invitation	
Add Invitees to the Event	
Run the Invitation Process	
Download Output Files	
Determine Whether a Constituent was Invited and/or Responded to an Event Invitation	50
Event Registration	51
RSVP Management	
Navigating the Registrations Tab	
Add Registrants and Guests for a Single Event	
Add Registrants to Multi-Level Events Using Registration Packages	
Registrant Record	61

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. For internal use only; any other use prohibited without the permission of all Copyright owners.

Add Restrictions	61
Tracking Event Attendance	. 66
Marking the Event as Inactive	69
Event Seating	
Configure Seating Layouts	. 71
Assign Seats	
Event Documentation	79
Documentation Overview	. 79
Event Reporting	79
Event Registration Lists and Nametags	. 79
Event Profile Report	. 81
Event Summary Report	
Event Seating Summary Report	. 83
Event Comparison Report	. 84
Event Revenue Report	. 85
Summary	86

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

NOTES

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:

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

# What Constitutes an Advancement Event?

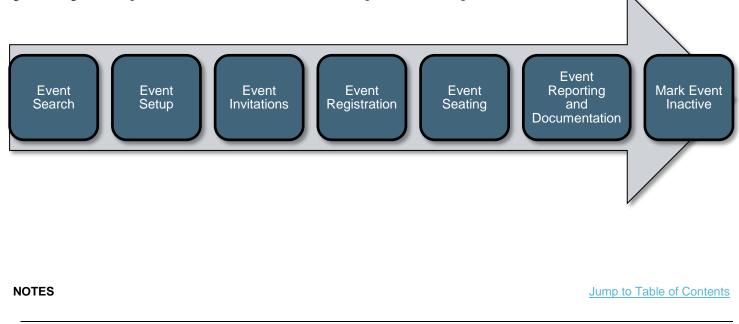
Advancement events at the University of Nebraska play an important role in helping to advance the mission of the university system. Advancement events are characterized as events that engage **donors, alumni, potential donors and community supporters** through gatherings both large and small. These events 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 <u>not</u> 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 <u>annie.bougger@nufoundation.org</u> 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.



Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

# **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.

ortcuts								
Add this page to	Events							
shortcuts	Corr y							
Manage my shortcuts	Enter the name of an event	Add new*						
Organization search	Line we sume of an event	Abo new						
Mr. Paul V. Jarrett								
cent searches	8 Event calendar 2							
Committee search		Calendar 🛄 List						Exa
Organization search	Jump to date: 4/1/2018	April 20					Day Week	Month Year
Smart query search		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Smare query search	Group by: Category	01	02	03	04	05	06	07
ently accessed	Events	15 NAA Travel Advent	ure Southern Culture					
ents	Sites:		11:30 AM 18 UNF Much				11:30 AM 18 UNF Burn	5:30 PM 18 NUF UN
18 UNKAA UNK UNF Quarterly Kearney Event	All sites 🔪 👗							
July 12 TM	Locations:	08	09	10	11	12	13	14
Mr. Paul V. Jarrett	All locations		ure Southern Culture	18 UNF WIN Women	5:00 PM 18 UNF UNO (	5:30 PM 18 UNKAA UN		
Meeting on 6/28/2018 - Interaction	Categories:	18 UNL ATH Night at		18 UNP WIN Women	DOUT PHILIS ONE DRUK	6:00 PM 18 UNMCAA U		
NU Board of Regents	All categories 💙 🏜	15	16	17	18	19	20	21
liewit Corporation	Include inactive	15 NAA Travel Advent	ure Southern Culture					
Mrs. Josie Jones	Only show my events			9:00 PM 18 UNF UNL P		5:30 PM 18 UNKAA Col	11:15 AM 18 UNL Law	18 UNF FB
16 NUF Holiday Party	Show tasks						5:30 PM 18 UNKAA For	5:00 PM 18 UNKAA
8-Mar-NAAMAG18-	Include completed tasks							
Mail-NAA Magazine March 2018		22	23	24	25	26	27	28
		15 NAA Travel Advent	ure Southern Culture	4:30 PM 18 UNKAA Spi				
Relationship Map				5:30 PM 18 UNF WIN F				
		29	30	01	02	03	04	05
		15 NAA Travel Advent	ure Southern Culture					
						5:00 PM 18 UNO Gradu		

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.

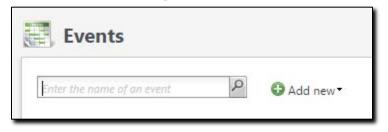
# **Event Search**

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.

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.

Name: baseball	Location:		Category:		*		Search
Date: All dates	▼ From: mm,	/dd/yyyy	🖸 То:	mm/dd/yyyy	-		Clear
Sites: All sites	× .						
Results (28 records found)							
Name	Lookup ID	Start date	End date	Contact	Site	Location	Cate
12 NAA AO Baseball Tailgate in AZ	12NAAAOAZBASE	2/18/2012	2/18/2012				-
12 NUF Husker Baseball	12NUFUNLBaseball	4/24/2012	4/24/2012				4U
13 NAA TIX Baseball (2012-2013 Seas	13NAATIXBASE	2/1/2013	2/1/2013				
14 NAA TIX Baseball	14NAATIXBASEB	1/20/2014	6/20/2014				
14 NAA AO Baseball in Phoenix	14NAABASEBALLAZ	2/15/2014	2/15/2014				
15 NAA TIX Baseball	15NAATIXBASEB	1/20/2015	6/20/2015				
15 NAA AO Baseball Tailgate Peoria	15NAAbbPeoria	2/12/2015	2/12/2015				
15 NAA AO Baseball Tailgate Houston	15NAAbbHouston	3/7/2015	3/7/2015				- 1
16 NAA TIX Baseball	16NAATIXBASEBALL	2/16/2016	6/20/2016				
16 NAA AO Baseball Event San Diego	16NAABBSANDIEGO	2/27/2016	2/27/2016				_
17 UNKAA Kearney 1967 KSC Baseball	17UNKAABaseball	4/21/2016	4/21/2016				4U
17 NAA TIX Baseball	17NAATIXBASEBALL	8/16/2016	8/16/2016				
17 NAA AO Baseball Event Tempe	17NAABBTEMPE	2/18/2017	2/18/2017		Nebraska Alumni		Nź
17 NAA AO Baseball Event Frisco	17NAABBFRISCO	3/4/2017	3/4/2017		Nebraska Alumni		NÆ
17 NAA YAA Baseball Event	17NAAYAABASEBA	5/10/2017	5/10/2017		Nebraska Alumni		Nź
18 NAA UNL Tempe Baseball Event	18NAAUNLTEMPE	2/17/2018	2/17/2018		Nebraska Alumni		N/ -
4							•

Ĝ

**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.

Jump to Table of Contents

#### NOTES

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

- 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.**

	Jump to date:	4/17/2017		<u> </u>	
	Group by:	Category		*	
Eve	ents				
Sit	es:				
AI	l sites		~	-	
Lo	cations:				
AI	l locations		~	*	
Ca	tegories:				
AI	l categories		~	-	
	Include inactive				
	Only show my e	vents			
	Show tasks				
	Include com	pleted task	s		

**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.

Event date:	4/17/2017	Status:	100%	Event exper	nses	100%	Event capa	ity			
Site:	Foundation; University of Nebraska at Omaha; UNO Business Administration	Active Lookup ID: 17UNFCBASD	50%	Agreed exper		50%	Event capacit Will attend:	0			
location:	UNO Mammel Hall		0%	Amount paid: 0% of budget		0%	Will not atter 0% of capacit				
Room/Unit: Contact:								-			
	Mrs. Jessica L. Rader										
Category:	UNF										
Category:	UNF										
		Speakers Expen	ses Options	Invitations	Appeals Docu	imentation J	lob Occurrences	Lodging Options	Attributes	Campaigns	Registrant Details
Fasks/Coordi		- Alexandra - Coldana	ses Options	Invitations	Appeals Docu	mentation 3	lob Occurrences	Lodging Options	Attributes	Campaigns	Registrant Details
Tasks/Coordi	nators Registrations	- Alexandra - Coldana	ses Options	Invitations	Appeals Docu	mentation J	lob Occurrences	Lodging Options	Attributes	Campaigns	Registrant Details
Coordinate Coordin	nators Registrations ors (1) 🕶 Add 🗵 lator	More •		Primary	Appeals Docu	mentation	lab Occurrences	Lodging Options	Attributes	Campaigns	Registrant Details
Tasks/Coordi Coordinate Coordin S Mrs. Jest	nators Registrations ors (1) 🕶 Add 🗵 lator	More • Event 17 UNF UNO CB	A Scholarship Di	Primary	Appeals Docu	mentation J	lob Occurrences	Lodging Options	Attributes	Campaigns	Registrant Details
Tasks/Coordi Coordinate Coordin © Mrs. Jest	nators Registrations ors (1)   Add 2 ator sica L. Rader	More • Event 17 UNF UNO CB	A Scholarship Di	Primary	Appeals Docu	ementation J		Lodging Options	Attributes	Campaigns	Registrant Details
Tasks/Coordi Coordinate © Mrs. Jest Tasks (1)	nators     Registrations       ors (1)     Add       ator       sica L. Rader       Add     Copy from	More T Event 17 UNF UNO CB	A Scholarship Di	Primary n 🧭	Appeals Docu			Lodging Options	Attributes	Campaigns	Registrant Details

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.

#### NOTES

Jump to Table of Contents

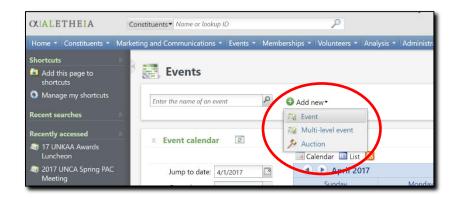
Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

Tab	Description
Designations	Displays designations associated with the event's fees. <u>Note</u> : 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 <u>Setting up Multi-Level Events</u> 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 <u>required</u>. Fill in the following details after selecting the type of event you want to add:

General		Details			
Name:		Start date:	mm/dd/yyyy	Start time:	hh:mm AM
Description:		End date:	mm/dd/yyyy	End time:	hh:mm AM
		Team fun	draising		
Category:	×	Appeal:			Q
Sites:	Site		information		P
		Location:			٩
	Event is an auction	Room/Unit:		× ₽ c	apacity: 0
	<ul> <li>Do not show event on calendar</li> <li>Event allows designations on fees</li> </ul>	Contact:			Q
Copy option	s				

#### NOTES

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 <u>online</u> (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. <u>**Tip:**</u> 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 <u>mandatory</u>. 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 **<u>mandatory</u>**. 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 <u>ONLY</u> used for events where the participants must pay a registration fee to attend, typically called *paid events*.
  - Paid events must be cleared and confirmed with the University of Nebraska Foundation Gift Processing Department <u>and</u> the UNF Accounting Department at least two weeks prior to your event going live. Contact the UNF Gift Processing

Department at <u>giftprocessing@nufoundation.org</u>. Contact the UNF Accounting Department at <u>celeste.knapper@nufoundation.org</u>.

- 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 <u>is</u> 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.

Jump to Table of Contents

#### NOTES

ame: ddress:	*mammel			Search Clear
ity: tate: IP/Postal code	· · · · · · · · · · · · · · · · · · ·			
esults (1 reco	rd found)			O Add
lame	Phone numbe	r Address	Capacity	
JNO Mammel	Hall		0	

iv. If your location <u>is not</u> 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:

a. Name

- i. 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."
- b. Phone Number
- c. Country
- d. Address
- e. City
- f. State
- g. Zip
- v. Save and Close when done.

Name:	1	
Phone number:		
Capacity:	0	
Address inform	nation	
Country:	United States	*
Address:		
City:		
State:	*	
ZIP:		
Room/Unit		
Room/Unit	name Ca	apacity
*		

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.

Location in	formation		
Location:	UNL Lied Center for Performing Arts	Q	
Room/Unit:	Capacity:	0	
Contact:		Q	
	Carson Theater	Add a new	v Room/Unit icon.
	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**.

Room/Unit:	
Capacity:	0

- k. **Capacity:** Enter the total number of attendees the event can accommodate. <u>Note:</u> <u>ONLY</u> include this if you have tickets or a limited number of seats available for your event.
- 1. **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 <u>biographicalrecords@nufoundation.org</u>.

4. Once you have entered all information for the event, click Save.

NOTES

- 5. After clicking **Save**, you are navigated to the event record. One final step is needed to complete the initial event setup.
  - a. Under Tasks on the explorer bar, click Edit Lookup ID.
  - b. A new window will appear with a prepopulated numerical name.
  - c. 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 <u>no</u> spaces.

d. 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 <u>required</u> for all events, regardless of whether there is a registration fee or not.

#### To Add Event Registration Options:

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

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation.	
Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owner	rs.

Tasks	~
🥖 Edit event	
🥖 Edit lookup ID	

Edit lookup ll	)	×
Lookup ID:	17UNFCBASD	
🕜 Help	Save	

	eral				
Regis	tration type:			~	
Name	e:				
Regis	tration count:		(	0	
Regis	tration fee:		\$0.00	0	
Cost:			\$0.00	D	
Bene	fits				
*	Benefit	Quantity	Unit value	Total value	Details

- **Registration Type:** This is the where you will distinguish the different types of registration options.
  - 0 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 <u>not</u> 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 <u>annie.bougger@nufoundation.org</u> or (402) 502-4122.

Jump to Table of Contents

#### NOTES

- **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@nufoundation.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.

View the summary for	17 UNF Spring Game.								
Event date: 4/14/2017 Site: Foundation Location: Room/Unit: Contact: Coordinator: Category: UNF	Status: Status: Lookup I 8-10002:	D: 50%	Event expenses Expense budget: \$0.00 Agreed expenses: \$0.00 Amount paid: \$0.00 0% of budget	50%	Event capacity: 0 Event capacity: 0 Will attend: 3 Will not attend: 0 0% of capacity Only this event				
asks/Coordinators Reg	strations Speakers	Expenses Options	Invitations Appeals	Documentation	Job Occurrences	Lodging Options	Attributes	Campaigns	Registrant Details
			istration co Donofita						
Registration type Na	me Registration	Receipt amo Rec	istration co benefits						
Registration type Na Adult Ad	-	So.00	1						
	ult \$25.00		1 1						
🛞 Adult 🛛 Ad	ult \$25.00 ild \$0.00	\$0.00 \$0.00	1 1						
S Adult Ad S Child Ch	ult \$25.00 ild \$0.00	\$0.00 \$0.00	1 1 1						
Adult     Ad       Child     Ch       Registration packages       Name	ult \$25,00 ild \$0.00 (2) ③ Add ② M Number of eve	\$0.00 \$0.00	1 1 1						
Adult Ad     Adult Ad     Child Ch	ult \$25.00 ild \$0.00 (2) Add 2 M Number of eve te 2	\$0.00 \$0.00 ore • Total amo	1 1 1						
Adult     Ad       Adult     Ad       Child     Child       Registration packages       Name       Adult - Game & Tailga	ult         \$25.00           ild         \$0.00           (2)         Add         Ø           Number of eve         M           te         2           te         2	\$0.00 \$0.00 ore • Total amo \$35.00 \$5.00	1 1 1						

- 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.

l a registration packag	je		00
General			
Name: Aduit - Game & Ta	ailgate		
Included registration op	tions		
Registration option	Registration fee	Registration count	
■ 17 UNF Spring Game			
Adult	\$25.00	1	
Child	\$0.00	1	
17 UNF Spring Game	Tailgate		
Adult	\$10.00	1	
Child	\$5.00	1	
Help		Save	cel

### **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.

#### NOTES

Jump to Table of Contents

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

2. Navigate to the **Options** tab.

Start date:	4/24/2018 - 5:30 PM	Status:	100%	E	vent expenses		100%	Event capacity	,
End date:	4/24/2018 - 7:30 PM	Active							
Site:	University of Nebraska Foundation	Lookup ID:	50%	-	pense budget:		50%	1072230000000000000000000000000000000000	
		8-10002792	1		reed expenses:		1	Will attend:	0
ocation:	UNK Fine Arts Building 2506 12th Ave Kearney, NE 68849		0%		nount paid: 6 of budget	\$0.00	on 🔴	Will not attend: 0% of capacity	0
oom/Unit:				-			-		
ontact:									
ontact.									
	C								
Cordinato Coordinato Category:	UNF								
Coordinato							1		
oordinato	UNF	Options	Invitations	Expenses	Attributes	Speakers	Appeals	Documentation	Jo
coordinato ategory: Registrati	UNF ions Tasks/Coordinators	Options Copy from			Attributes	Speakers	Appeals	Documentation	Jo
coordinator ategory: Registrati	UNF Tasks/Coordinators on options (0) • Add				Attributes		Appeals	Documentation Receipt amount	ol
oordinatol ategory: Registrati egistrati	UNF Tasks/Coordinators on options (0) • Add	Copy from					Appeals		Jo
coordinator ategory: Registrati	UNF Tasks/Coordinators on options (0) Add ation type N	Copy fron	n   😰   Mon				Appeals		ol

- 3. On the **Preferences** action bar, click **Add.**
- 4. 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 <u>Event Registration section</u>.

Name	E Dinner Choices
	Options
	Chicken
	Beef
	Fish
	Vegetarian
*	

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

6. 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.

ALETHEIA	Constituents   Name or lookup ID
ome 🕶 Constituents 👻 Ma	rketing and Communications • Revenue • Events • Prospects • Volunteers • Fundraising • Analysis • Administration • PaperSave • NUFFO •
sks ☆ ' Edit registrant	Event: 17 UNF UNMC FPBCC Search Tower Lighting Mr. Timothy P. Abariotes - Event Registrant
<sup>1</sup> Edit registrant ID 2 Delete registrant 3 Mark as will attend 4 Add as an event speaker ther information ≈ 5 Go to constituent	668 N 55th St     Registrant ID: evreg-11254902     Total registration fees:     \$0.00     Payment history:       7ype:     Invitation     Total paid:     \$0.00       402-345-4488     Will not attend     Balance:     \$0.00       No. of guests:     0     Total receipt amount:     \$0.00
ortcuts Add this page to shortcuts	Registrations     Lodging and Travel     Restrictions     Attributes       Registrations
ccent searches  Smart query search  Contractions Contrac	

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

ALETHEIA	Constituents   Name or lookup ID
ome 🔻 Constituents 👻 Ma	rketing and Communications • Revenue • Events • Prospects • Volunteers • Fundraising • Analysis • Administration • PaperSave • NUFFO •
sks ☆ 'Edit registrant	Event: 17 UNF UNMC FPBCC Search Tower Lighting Mr. Timothy P. Abariotes - Event Registrant
Edit registrant ID Delete registrant Mark as will attend Add as an event speaker ther information $pprox$ Go to constituent	668 N 55th St Omaha, NE 68132-2116 402-345-4488     Registrant ID: evreg-11254902     Total registration fees:     \$0.00       Ype:     Invitation     Total paid:     \$0.00       Status:     Will not attend     Balance:     \$0.00       No. of guests:     0     Total receipt amount:     \$0.00
Iortcuts & Add this page to shortcuts Manage my shortcuts	Registrations     Benefits     Lodging and Travel     Restrictions     Attributes       Registrations          ✓ Edit
scent searches Smart query search Event revenue Fevent search scently accessed Mr. Timothy P. Abariotes	

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

#### NOTES

Edit registration Registrant: Mr. Timothy P. A Packages Single Events 17 UNF UNMC FPBCC	<sup>bariotes</sup> Search Tower Lighting - Sir		Total registration fees: \$0.00 Receipt amount: \$0.00
Registration option Individual		ts Benefits 1 Dinner Options	Waive registration fee
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.

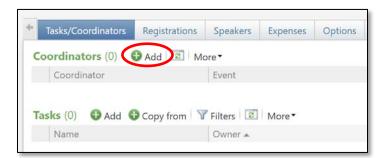
### Add Event Coordinators

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.

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).

Event:	17 UNF UNO CBA Scholarship Dinn
Coordinator:	ع
	Is primary

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.

Jump to Table of Contents

#### NOTES

Last/Org/Group	p name:		Address:			Search
First name:			City:			Clear
Lookup ID:			State:		~	
Sites:	All sites	~	ZIP:			
Primary busine	ss:					
	Matc	h all criteria exactly				
0						
Show advar	nced search option	15				
	Name	Constituent type	Address	City	State	ZIP
	Name	Constituent type	Address	City	State	ZIP
	Name	Constituent type	Address	City	State	ZIP
	Name	Constituent type	Address	City	State	ZIP
	Name	Constituent type	Address	City	State	ZIP
	Name	Constituent type	Address	City	State	ZIP
	Name	Constituent type	Address	City	State	ZIP
	Name	Constituent type	Address	City	State	ZIP
	Name	Constituent type	Address	City	State	ZIP
Results Lookup ID	Name	Constituent type	Address	City	State	ZIP

- 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**.

tart date:	4/24/2018 - 5:30 PM	Status:	100%	Event ex		
nd date:	4/24/2018 - 7:30 PM	Active	1			
ite:	University of Nebraska Foundation	Lookup ID: 8-10002792	50%	Experies b Agree	d a task	
ocation:	UNK Fine Arts Building 2506 12th Ave Kearney, NE 68849		05	Amo 5% of		/IN Kearney Symphony Co
loom/Unit:			1		Name: Contact v	enue to confirm sound systen
ontact:					Comment:	
oordinato	r.					
ategory:	UNF	/				
					Owner:	~ ۶
	Tacks /Coordinators		itations - Eva		Owner: Date due:/dd/y	lane l
Registrat	Clerken.	Options Inv	itations Exp	enses /		lane l
		Cotions Inv	itations Exp	enses /	Date due: <u>mm/dd/y</u>	<i>ууу</i>
Registrat	tors (0) 🚯 Add 🖾		itations Exp	enses / Pr	Date due: mm/dd/y	lane l
Registrat	tors (0) 🚯 Add 🖾	Nore •	itations Exp		Date due: <u>mm/dd/y</u>	<i>ууу</i>
Registrat	tors (0) C Add C A	Nore •	T		Date due: <u>mm/dd/y</u>	<i>ууу</i>

- 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.

Owner:	1	~	9
Date due:			
	Mrs. Jessica L. Rader		

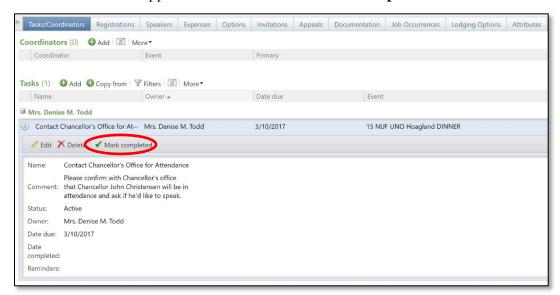
e. Click Save.

#### To Mark a Task Complete:

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

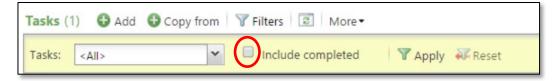
#### NOTES

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



5. 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:

1. Click the Lodging Options tab of the event record.

Event date: 4/15/2015 Site: Location: Room/Unit: Contact: Coordinator: Category:	i	Status: SInactive Lookup ID: 15NUFUNC	509	กระเทิดการ	Event expen Expense budg Agreed expen Amount paid: 0% of budget	et: \$0.00 ses: \$0.00 \$0.00	50%	Event capacity 0 Event capacity 0 Will attend: 6 Will not attend: 0 0% of capacity	
Tasks/Coordinators	Registrations	Speakers	Expenses	Options	Invitations	Appeals	Documentation	Job Occurrences	Lodging Options
Lodging options (0) Lodging location	G Add	<ul><li>В м</li></ul>	ore • Allocated	ł		Assigned		Remaining	Over-ass

- 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.

Event:	15 NUF UNO Hoagland DINNER		
Lodging location:	٩		
Room types:	Туре	Sleeps	Allocated

NOTES

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

Name:	*hilton		Country:			~	Search
Address:			State:			~	Clear
City:			] ZIP/Posta	l code:			
Results (0	records found)						🔂 Add
Name	Address	City		State	ZIP/Postal code	Country	$\smile$

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

General	Address information	
Name:	Country:	~
Phone number:	Address:	
Contact:	Q	
Discount code:	City:	
Comment:	State:	~
	ZIP:	
Room types		
Туре		
*		

- d. In the Add a lodging location window:
  - 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.

🥡 15 NUF UN	NO Hoagla	and DIN	INER			
Event date: 4/15/2019 Site: Location: Room/Unit: Contact: Coordinator: Category:	5	Status: S Inactive Lookup ID: 15NUFUNC	505	National New York, Ne	Event expen Expense budg Agreed expense Amount paid: 0% of budget	et: \$0.00 ses: \$0.00 \$0.00
Tasks/Coordinators	Registrations	Speakers	Expenses	Options	Invitations	Appeals
Speaker	ld a speaker	NUF UNO Hos	igland DINNE		3	
	Date : mr Time: Comment: Help		m AM	Cancel		

a. Speaker: Search for and select the constituent who will speak at the event.
 Note: The speaker must have a constituent record.

NOTES

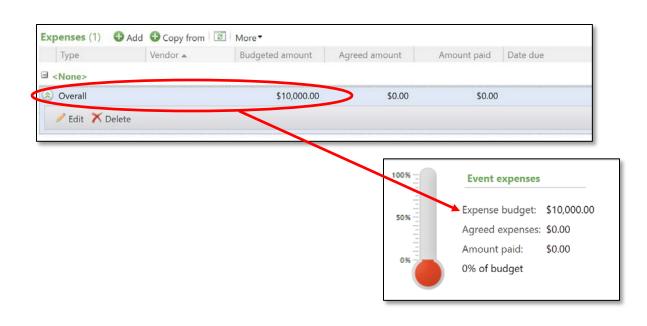
- b. **Topic**: Enter information about the topic on which the speaker will speak.
- c. **Date and time:** Details on when the speaker will speak.
- d. Comment: Add any additional comments about the speaker.
- 3. Click Save.

### 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.



#### To Add/Track Event Expenses:

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

Event date: Site: Location: Room/Unit: Contact: Coordinator Category:	7/10/2018 University of Nebraska Foundation : Mrs. Denise M. Todd UNF	Status: Active Lookup ID: 8-10003018	100%	Event expe Expense bud Agreed expe Amount pai 0% of budg	dget: \$0.00 enses: \$0.00 d: \$0.00	50%		Event capacity vent capacity: 0 Vill attend: 7 Vill not attend: 4 % of capacity
Registratio	ons Tasks/Coordinators	Documentation	Invitations	Expenses	Options	Speakers	Appeals	Job Occurrenc
Expenses (	0) 🕀 Add 🕀 Copy from	m 📰 More▼						
	Vendor 🔺	Budgeted am		d amount	Amount	11 0	te due	Date paid

#### NOTES

Jump to Table of Contents

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

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

Event:	18 UNF UNL Health Ce	enter UNMC Nu	rsing CEREMON	*
Type:				*
Vendor:				9
Budgeted amount:	\$0.00			
Agreed amount:	\$0.00	Date due:	mm/dd/yyyy	9
Amount paid:	\$0.00	Date paid:	mm/dd/yyyy	9
Comment:				1

- a. Type: Select the type of expense.
- b. **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.**
- c. Budgeted: Leave blank (see To Add/Track Event Expenses and Budget below).
- d. **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.

t expense				⊠			
Type: Vendor:	Catering			× 2			
Budgeted amount: Agreed amount:	\$0.00	Date due:	3/30/2017		100% -	Event expenses	
Amount paid: Comment:	\$0.00	Date paid	mm/dd/yyyy			Expense budget: Agreed expenses: Amount paid:	
Help			Save	Cancel	os	25% of budget	\$0.00

- e. **Amount Paid:** The total amount paid and the payment date. This amount would include gratuity.
- f. 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.

Туре:	Catering			~
Vendor:				P
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.		

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**.



#### NOTES

# 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.

Events	
Enter the name of an event	O Add new ▼
☆ Event calendar III	Multi-level event

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

A	dd a multi-level event		×
	Event management template:	Basic Event Template	
	🛧 🔸 🜩 🖨 🔂 Add 🔂 Copy	from 😯 Add existing 🥖 Edit 🗡 Delete	

- 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 <u>Add an Event</u>.

General		Details	
Name: Description:		Start date: mm/dd/yyyy Start time: hh:mr	
Description:		End date: mm/dd/yyyy  End time: hh:mr Team fundraising	n AM
Category: Sites:	Site	Appeal: Location information	P
		Location:	P
	Event is an auction	Room/Unit: Capacity:	0
	<ul> <li>Do not show on event calendar</li> <li>Event allows designations on fees</li> </ul>	Contact:	Q

- 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.

Jump to Table of Contents

#### NOTES

Event management template:	Basic Event Template
1 + + + • • Add • Cd	opy from 🖸 Add existing 🥒 Edit 🏋 Delete

General			Details			
Name:			Start date:	mm/dd/yyyyy	Start time:	hh:mm AM
Description:			End date:	mm/dd/yyyy	End time:	hh:mm AM
			Team fun	draising		
Category:		*	Appeal:			Q
Sites:	Site			information		
			Location:			Q
	Event is an auction		Room/Unit:		v 🖗	Capacity: 0
	Do not show on event cale	ndar	Contact:			٩
	Event allows designations of	on fees				
Сору						
Copy from:	1	Q				
	Copy tasks	Copy expenses	✓ C	opy registration options	🗹 Сору р	references
	Copy invitations	Copy invitees	✓ C	opy lodging options		
	Copy job occurrences	Copy designation		opy team structure	Convet	eam members

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

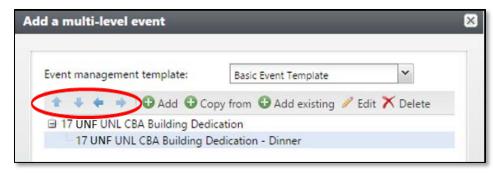
A	dd a multi-le	verevent		_			
	Event manage	em <mark>ent templ</mark> ate	Basic	: Event Template		~	
	* * *	Add	Copy from	C Add existin	g 🚩 Edit 🗡	Delete	
				$\smile$			
	🕜 Help				Save	Cancel	
					100	8	
_							
_							
nt Search	_	-	-	-	-	-	٥
		-	Site			v	
<b>nt Search</b> Name: Location:			Site:	m/Unit:		~	Search Clear
Name:						~	Search
Name: Location:	Include inact	tive				~	Search
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:			Clear
Name: Location: Lookup ID:	Include inact Name	tive Start date			Contact	<b>∨</b> Site	Search
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear
Name: Location: Lookup ID: <b>Results</b>			Roo	m/Unit:	Contact		Clear

- 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.

Jump to Table of Contents

#### NOTES

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.



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.

Tasks a Street Calendar	17 UNF UNL CBA Building Dedication	on - Level Summa	ry		
Other Information *	Events Tasks Registrants Expenses				
17 UNF UNL CBA Building Dedication - Level	Events (2) 🛞 🛞 🕄 More *				
Dedication Cores	Name	Start date	Start time	End date	End time
Shortcuts 👘	IT UNFUNL CBA Building Dedication - Level	4/28/2017		4/28/2017	
	ITUNE UNL CBA Building Dedication - Dinner	4/28/2017		4/28/2017	
Recent searches	4				
Recently accessed					

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

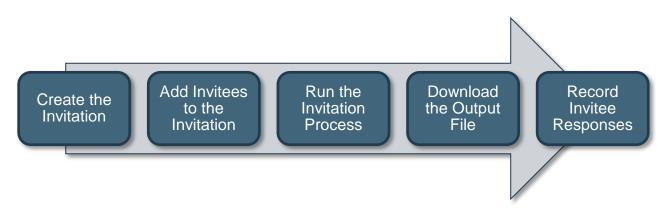
Tab	Information
Events	Displays information about the main event and each event that supports the main event.
Tasks	Displays tasks for all events associated with the main event.
Registrants	Displays registrants for all events associated with the main event.
Expenses	Displays expenses for all events associated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

# **Event Invitations**

Using the event invitation functionality in Ali, you can:

- 0 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.
- o 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.**

NOTES

Start date: End date:	3/10/2017 - 7:30 AM 3/10/2017 - 9:00 AM	Status:	100%		Event expenses		100%	Event capacity	У
Site: Location: Room/Unit: Contact: Coordinator Category:	University of Nebraska Foundation	Lookup ID: 17NUFUNLASHSB	50%	A	xpense budget: greed expenses mount paid: % of budget		50% 111111	Event capacity: Will attend: Will not attend: 0% of capacity	0
legistrations			witations	Expenses	Options 9	Speakers	Appeals	Job Occurrences	Lod
		Mail date		De	scription				
Name		Iviali date		De	scription				

Name:	17 UNF UNL AS Humanities Sy	mposiun		
Description:	Invite list			
/ail date:	mm/dd/yyyy			
Results				
	ection from results			
Selectio	n name:	j selection		

- 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.



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.

eneral Processing	Options	
How do you want to	o send your invitation?	
Send through bot	th mail and email, according to each constituent's preferences.	
If the constituen	it does not have a preference, attempt to send: Email	
Send through em	ail only	
Send through mail	il only	
Select the package(	(s) for your invitation	
-		
Email package:	Cost: \$0.00 Content:	
Mail package:	Cost: \$0.00 Content:	
Select the address p	processing and name format options for your invitation	
Address processing:	*NU - Standard Address Processing 👻 🖻 🥒	
Name format:	Primary Name Format	
Select household op	ptions for your invitation	
Include:		
Include:	Qualifying individuals and organizations Send to one person per household	
	<ul> <li>Send to one person per nousehold</li> <li>Also include qualifying households which do not have any members</li> </ul>	
	<ul> <li>Also include qualifying industrious which do not have any members</li> <li>Also include qualifying industrious who are not members of any household</li> </ul>	

- 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. <u>IT IS RECOMMENDED</u> 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.

NOTES

- 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. <u>DO NOT</u> click send until you are ready for the email to be pushed out.
- 5. Mail package. Select the packages(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).

Name:	1			Cost:			Search
Description:				Category:		~	Clear
Code:				Site:		~ ,0	
					Match all criteria e	exactly	$\sim$
Results							🔂 Add
Name	Description	Code	Cost	Site	Channel	Category	Channel sou

- 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.

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

Package details				
Name:				_
Description:				
Site:				v 0
Category:				~
Package code:			~	
Channel code:			~	
Costs				
Base cost:	\$0.0000	Distribution:	Per piece	~
Additional content cost:	\$0.0000			
Total per piece cost:	\$0.0000			
Primary content				
Letter:				ρ 🥖
Export definition:				PI

- 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.

ort Definition Search Form	n			C
Name: event	Site:		9 م	Search Clear
Results (1 record found)				G Add
Results (1 record found) Name	Туре	Site	Descrip	

- 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.

#### NOTES

### 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.)

<i>i</i> 18 U	INF UNO COE Bi	omechanic	s Additic	on Grou	ndbrea	aking
Start date:	5/21/2018 - 5:30 PM	Statu	ıs:	100%		event expenses
End date:	5/21/2018 - 9:00 PM	😣 II	nactive			
Site:	University of Nebraska Foundation		up ID: NFUNOCOEBAG	50%	E> A	pense budget: greed expenses:
Location:	UNO Biomechanics Resear 6160 University Dr South Omaha, NE 68182	ch Building		0%	A1	mount paid: 9% of budget
Room/Unit:						
Contact:						
Coordinator	Admiral Annie E. Bougger					
Category:	UNF					
* Registratio	ons Tasks/Coordinators	Documentation	Invitations	Expenses	Options	Speakers A
Invitations	(1) 🚯 Add 📧 More	•				
Name		Mail date		Descrip	tion	
18 UNF	UNO COE Biomechanics A	/29/2018		Invite lis	st 1	

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

	Add • 😌 Copy from	More▼		
<ul> <li>Constituent</li> <li>Multiple constituer</li> <li>Status:</li> </ul>	ρ	Include in next send:		~
Invitee	Invitatio	on 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:

Selected constituents:		P /
	Exclusions	

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.
  - University staff should contact Jessie Rader, Director for Advancement Records & Research, at jessie.rader@nufoundation.org or (402) 458-1206.

Jump to Table of Contents

#### NOTES

- 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.
- 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

	*Board						Search
Record type:	Constituent	~					Clear
Format:		*					
Site:			* <i>P</i>				
	Include ina	ctive					
Results (2 red	cords found)						Add
Name		Description	Record type	Format	Site	Date	User
'Board memb	er' Constitue	All Constitue	Constituent	Dynamic	All sites	1/13/2015	BLAC
Current Board	d Members	All Constitue	Constituent	Dynamic	All sites	1/12/2015	BLAC

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.** 

elected constituents: NU Board of Regents (Ad-hoc Qr P /	Consider exclusions as of: Today
Help Cance	Exclude constituents with the following solicit codes: Solicit code No Contact
	Exclude deceased constituents
	Exclude inactive constituents     Required Exclusions
	Exclude constituents with the following solicit codes: Solicit code

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

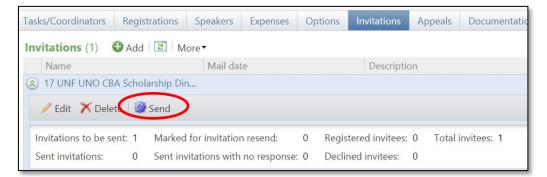
The invitation process can be run through the Event invitation window or from the Invitations tab.

NOTES

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.

Task Send 17 UNF UNO CBA Scholarship Dinner to 17 UNF UNO CBA	Event: 17 UNF UNO CE 17 UNF UNO Invitees Invitation History	CBA Scholarship Dinne	er			2
Scholarship Dinner invitees Gold Control CBA Scholarship Dinner	Invitees (1) O Add - Constituent:	Copy from Copy from More		Apply 🏹 Reset		
Shortcuts	Status:	~				
Recent searches	Invitee Jones, Josie N.	Invitation sent on	Registered	Declined	Include in next send	Excluded from last send
Recently accessed						

- 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.



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*.

General Processing Op		
	1/1901	
Results		
Create selection from	results	
State of the state		
	Overwrite existing selection	

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

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

Event:	17 UNF UNO CBA Scholarship Dinner		
Name:	17 UNF UNO CBA Scholarship Dinner		
Description:			
Recent Status	History Job Schedules		
Status:	🛞 Running		
Status messa	ge: 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 pro	cessed: 0
Export out	puts (1) 💿 More -		
Export de	efinition	Count	Packages

6. Once completed, the Status will show Completed.

Invitee Li	UNO CBA Schola	rship Dinner	
	17 UNF UNO CBA Scholarship Dinn 17 UNF UNO CBA Scholarship Dinne		
Recent Status Status:	History Job Schedules		
Status messag Started by: Started: Ended: Duration:	pe: Completed NUFOUNDATION\jrader 4/20/2017 10:50:48 AM 4/20/2017 10:51:08 AM 20 seconds	Server name: Total records processed: Number of exceptions: Records successfully pro	0
Export de	outs (1) 🗵 More • finition tation Mailing List	Count	Packages nvitation 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 <u>not</u> pull into the mailing list. You must send them an email separate from the process.** 

#### NOTES

Jump to Table of Contents

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

# 48

Event: 17 UNF UNO CBA	Scholarship Dinner BA Scholarship Dinner					
Invitees Invitation History						
Invitees (2) OAdd+ O	Copy from 1 🖾   More -					
Constituent:	P Include in next send:		¥ Apply ¥Z Reset			
Invitee (a) Jones, Josie N. (a) Rader, Jessica L.	Invitation sent on 4/19/2017 4/20/2017	Registered Ø	Declined	Include in next send	Excluded from last send	

### **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.

Invitee Lis	، IF UNO CBA Schola	rship Dinner			
	7 UNF UNO CBA Scholarship Dinn 7 UNF UNO CBA Scholarship Dinne				
Recent Status	History Job Schedules				
Status:					
Status message	e: 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 pro	cessed: 1		
Export output	uts (1) 🗉 More 🗸				
Export defi	inition	Count	Packages		Quantity St
Event Invita	ation Mailing List	1 1	nvitation Mailing - 17UNF UNO	C	1
\Re Start Bla	ckbaud Internet Solutions email jo	ob 🖉 View Blackbaud Internet	Solutions email job status detai	C 🕞 Dow	ownload output •
					tiple files
					uped files

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

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

**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* <u>*not*</u> 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 <u>not</u> 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**.

2 · · · · · · · · · · · · · · · · · · ·		20. 24	Prospect	Fundraiser					History		
Communication	is Appeals I	Preferences	Newslett	ers							
ommunicat	(1) <b>A</b>		and a particular								
ommunicat	ions (1) O Add g	general corre	spondence	Add appea	I mailing 🔲 Mo	ore •					_
Communicatio	Event Invitations	*	ate range:	All	~						
	Evenenivitations		and hange			Y Apply 🐺 R	eset				
Channel:	All	Y	Sites:	All sites	× 25						
Date sent		Comm	unication		Details		Has responses	Site		Channe	e
This month											
3/22/2017			and the second second								-
	<b>C</b>	Event	nvitation		17 NAA VAA Ba	aseball Event - 17	7 N., No 🥏	N/A		Mail	

#### NOTES

#### Jump to Table of Contents

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

# **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.
- 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.

4. Click Register.

Registrations	(2) 🔂 Add 🗵	More •				
Туре:	1	Registrant:				
Status:	~	Attended:		~	Apply 🏹 F	Keset
Registra	nt 🔺	Туре		Status		1
🔲 🛞 Jones, Jo	sie N.	Invitation	n	Registered		
🔲 🛞 Rader, Je	ssica L.	Invitation	ı	No reply		

- 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**.

d a registrant				
Registrant: Mrs. Jessica L. Ra	der M.D.			Total registration fees:
				Receipt amount:
Packages Single Events				
7 UNF UNO CBA Sch	olarship Dinner - Single	e Events		
	ip Dinner(Monday, April 17,			
Registration option	Registration fee Regi	trants Benefits		
Adult	\$0.00	1		
	Registrant	Menu	Parking	Waive registration fee
Registration option				
Registration option Adult	Mrs. Jessica L. Rader M.I	). Chicken	×	

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

Jump to Table of Contents

#### NOTES

- 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.

essica L. Rader M.D. ssica L. Rader M 💌 🔎
essica L. Rader M 👻 🔎
ned guest)
mie L. Johnson
/ler A. Rader
ssica L. Rader M.D.
loris Springer

- 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.

	NF UNO CBA Scholarship Dinner essica L. Rader - Even 1010 Lincoln Mall Ste 300 Lincoln, NE 68508-2886 402-458-1206 jessie.rader@nufoundation.or www.linkedin.com/in/jessierad	Registrant ID: Type: Status:	evreg-11370802 Invitation Registered 1	Total registration fees: Total paid: Balance: Total receipt amount:	\$0.00 \$0.00	Payment history:
Registrations Mr. Skyler A. R 17 UNF UNO Adult Chia Mrs. Jessica L. 17 UNF UNO	✓ Edit 2 ader CBA Scholarship Dinner (Monday, cken		25			

#### 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 <u>Invitation Process</u>.

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

Start date: End date:	10/19/2018 - 5:30 PM 10/19/2018 - 8:30 PM	Status:	100%	Event ex	kpense:
Site: Location:	University of Nebraska Foundation	Lookup ID: 8-10003019	50%	Expense l Agreed ex Amount p	xpense
			0%		
Room/Unit: Contact:	Advised Association Development		•	1033% of	budge
Contact: Coordinator	: Admiral Annie E. Bougger UNF		•	1033% of	budge
Contact: Coordinator Category: Registrati	UNF ons Tasks/Coordinators	Documentation	Invitations	1033% of Expenses	
Contact: Coordinator Category: Registrati	UNF		Invitations		Optic

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

Jump to Table of Contents

#### NOTES

gistrant:	Q	۲	Preregistration	Total registration fees:	\$0.00
			Walk-in registration	Receipt amount:	\$0.00
ickages Single Events					
UNF Annual Meeti			8:30 PM)		
UNF Annual Meeting of			8:30 PM)		
UNF Annual Meeti UNF Annual Meeting o Registration option	f Trustees (Friday, Octo	ber 19, 2018 5:30 PM -	8:30 PM)		
CUNF Annual Meeting o Registration option Registration option	f Trustees (Friday, Octo Registration fee	ber 19, 2018 5:30 PM - Registrants Benefits	8:30 PM)	Waive registration fee	

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 <u>To Add a Registrant Without a Constituent Record</u>.

Registrant: Ms. Angela B. Tay	rlor P	Preregistration	Total registration fees:	\$0.00
		Walk-in registration	Receipt amount:	\$0.00
Packages Single Events				
Registration option	Registration fee	ber 19, 2018 5:30 PM - 8:30 PM) Registrants Benefits		
	222320			
Individual	\$0.00	0		
	\$0.00	0 Registrant	Waive registration fee	

- 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.

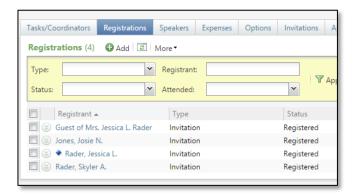
*	Registrant 🔺	-
ar -	🔲 🎯 Jones, Josie N.	h
	🔲 🛞 🔷 Rader, Jessica L.	I
*	🖉 Edit 👻 🗙 Delete 🖌 Mark	as▼
🥖 Edit	registrations r, Skyler A.	l.
🥖 Edit	registrant	

- 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.

Jump to Table of Contents

#### NOTES

gistrant: Mrs. Jessica L. Rad	ler			Total registration fees: \$0.00
				Receipt amount: \$0.00
ackages Single Events				
		- ·		
UNF UNO CBA Scho	olarship Dinner - Single	e Events		
UNF UNO CBA Scholarshi	ip Dinner(Monday, April 17,	2017)		
Registration option	Registration fee Regis	trants Benefits		
Registration option		trants Benefits		
Registration option Adult	Registration fee Regis	trants Benefits 3		
			Parking	Waive registration fee
Adult	\$0.00	3	Parking	Waive registration fee
Adult Registration option	\$0.00 Registrant	3 Menu	Parking	
Adult Registration option Adult	\$0.00 Registrant Mrs. Jessica L. Rader	3 Menu Chicken	Parking	



#### 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.

a. Click Add.

	CBA Scholarship Dinner > Host: Mrs rs. Jessica L. Rader -				
	Registrant ID: evreg-11370804 Type: Invitation Status: Registered No. of guests: 0	Total registration fees: Total paid: Balance: Total receipt amount:	\$0.00 \$0.00	story:	
Registrations     Benefits       Attributes     (0)       Category	Restrictions Attributes	Valua	Add registra	nt attribute	×
_	s <b>trant Attribute</b> wind zent Guest <u>First</u> Nam		Category: Value: Start date:	Event Guest First Name Leiia mm/dd/jyjyy	~
	med Guest's First Na <sup>7</sup> irstname Lastname	me	End date: Comment:	mm/dd/yyyy Leila Rader	
b. Click <b>Add</b> . i. The <b>Add Regi</b> s	s <b>trant Attribute</b> wind	ow will open.	Add registra	Save Save	Cancel
•	<b>rent Guest <u>Last</u> Nam</b> med Guest's Last Na		Category: Value: Start date:	Event Guest Last Name Rader mm/dd/yyyy	~
Event: 17 UNF UNO CBA Scholarship Dinner > Host: Mr			End date: Comment:	mm/dd/yyyy	
Registrant ID: evreg-11370804 Type: Invitation Status: Registered No. of guests: 0	Total registration fees:     \$0.00     Payn       Total paid:     \$0.00       Balance:     \$0.00       Total receipt amount:     \$0.00	nent history:	🕢 Help	Save	Cancel
Registrations     Benefits     Restrictions     Attributes       Attributes (2)     Add     Image: Category     More +       Category     Attribute group       Sevent Guest First Name	Value Leila	Start date			
<ul> <li>Event Guest First Name</li> <li>Event Guest Last Name</li> </ul>	Leila Rader				

#### NOTES

### 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.

Id a registrant Registrant: Mrs. Jessica L. Rader	Q	<ul> <li>Preregistration</li> <li>Walk-in registration</li> </ul>	Total registration fees: \$35.00 Receipt amount: \$0.00
Packages Single Events			
17 UNF Spring Game - Pack Adult - Game and Tailgate (\$35.00			
Event	Benefits		
17 UNF Spring Game			
17 UNF Spring Game Tailgate			
Registrant		Waive	registration fee
Mrs. Jessica L. Rader			
*			
Child Game & Tailgate (\$5.00)	Benefits		
17 UNF Spring Game			
17 UNF Spring Game Tailgate			
Registrant		Waive	registration fee
*			
			•
Help			Save

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

	ader 🖉	<ul> <li>Preregistration</li> <li>Walk-in registration</li> </ul>	Total registration fees:         \$60.00           Receipt amount:         \$0.00
UNF Spring Game	Single Events		
UNF Spring Game(Frida			
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	
*			
7 UNF Spring Game Tailg			
Registration option	Registration fee	Registrants Benefits	
Registration option Adult	Registration fee \$10.00	Registrants Benefits 0	
Registration option	Registration fee	Registrants Benefits	
Registration option Adult	Registration fee \$10.00	Registrants Benefits 0	Waive registration fee

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

Jump to Table of Contents

#### NOTES

### **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.

2	Lincoln, N 402-458- jessie.rade	oln Mall Ste 300 E 68508-2886 1206 er@nufoundation.org edin.com/in/jessierader	Registrant ID Type: Status: No. of guests	: evreg-11370802 Invitation Will not attend :: 2	Total registration fees: Total paid: Balance: Total receipt amount:	\$0.00 \$0.00 \$0.00 \$0.00
Registrations E		ing and Travel Restri	ctions Attribu	tes		
		Туре		Option		
×	<b>T</b>					
Registrant name		Туре				

- 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.

Туре	Option
Dietary Restrictions	▼
*	
	Gluten-Free
	Kosher
	Lactose Intolerance
	Nut Allergy
	Shellfish Allergy
	Vegan
	Vegetarian

#### NOTES

**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.

	Lin 402 jes	10 Lincoln Mall Ste 30 coln, NE 68508-2886 2-458-1206 sie.rader@nufoundati w.linkedin.com/in/jes	on.org	Registrant ID: Type: Status: No. of guests:	evreg-1137080. Invitation Will not attend 2
Registrations Attributes (0 Category	Benefits ) 🔁 Adc	Lodging and Travel	te group		value
		Category: Value: Start date: End date: Comment:	Dietary Restr Mushrooms mm/dd/yyyyy		×

#### 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.

	402-458-1206	Type: Status:	Invitation Will not attend	Total paid: Balance:	\$0.0 \$0.0 \$0.0
	jessie.rader@nufoundation.org www.linkedin.com/in/jessierader	No. of guests:	: 2	Total receipt amount:	\$0.0
Registrations Ben	efits Lodging and Travel Restric	tions Attribut	tes		
Registrant name 👻	Туре		Option		
\delta 🛛 Mrs. Jessica L.	Rader				
🧪 Edit registratio	on restriction 🥜 Edit constituent de	fault restrictions			
🥜 Edit registratio	on restriction 🥒 Edit constituent de	efault restrictions	>		

#### 6. Click Edit constituent default restrictions.

**Note:** Constituent default restrictions will write back to the constituent record and will autopopulate 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**.



#### NOTES

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:

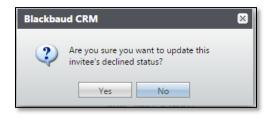
If <b>Status</b> displays:	The response indicates:
Registered	The individual <b>WILL ATTEND.</b>
Declined Canceled Will Not Attend	The individual <b>WILL</b> <u>NOT</u> ATTEND.
No Reply	Individual has <b>NOT</b> <b>RESPONDED.</b>

#### 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.

asks/Coordinators	Registrations	Speakers	Expenses	Options	Invitations	Appeals	Documentation	Job Occu
Registrations (5)	🔂 Add 🗵	More •						
Туре:	~	Registrant						
Status:	~	Attended:			<b>~</b>	Apply 🏹 F	Reset	
Registrant		Туре	Status	Attended	Online regis	strant Bal	a Host	
🔲 🛞 Jones, Josie N	۱.	Invitation	Registered			5	0.00	
🔲 🛞 Krebs, Stepha	inie A.	Invitation	No reply			5	0.00	
🕒 Register 🥒	Edit 🔹 🗡 Delet	e 🗸 Mark	as declined	>				
🔲 🍥 🔷 Rader, Jes	sica L.	Invitation	Registered			\$	0.00 Rader, Jessica	a L.
🔲 🛞 Guest of Mrs.	Jessica L. Rader	Invitation	Registered			5	0.00 Rader, Jessica	a L.
	Α.	Invitation	Registered				0.00 Rader, Jessica	

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



### **Tracking Event Attendance**

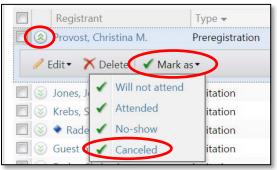
Once registrants are entered into the event, their attendance can be tracked. They can be marked as **Will not attend**, **Attended**, **No-show**, or **Canceled**.

#### 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.

Jump to Table of Contents

Registra Registra Provost, Edit • X

NOTES

Rader, Jessica		Invitation	Registered
Rader, S 🖌 At	e Mark as ill not attend tended p-show anceled	Invitation Invitation	Registered Registered

	31	Provide and a second seco	
∃ 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.

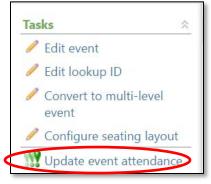
#### **Tracking Attendence Post-Event:**

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**.

🔲 🛞 Guest of Mrs. Jessica L. Rad.		Registered	
Rader, S Will not attended No-show Canceled		Registered	
Tasks/CoordinatorsRegistrationsRegistrations(6)Herein Add	Speakers Expenses	Options Invitations	Appeals Documentation Job O
Type: Status:	Registrant:     Attended:	× Y	Apply 🏹 Reset
Registrant	Type	Status Registered	Attended
Solies, Josle N.	Invitation	Declined	No
🔲 🥹 Provost, Christina M.	Preregistration	Canceled	No
🔲 🛞 🔹 Rader, Jessica L.	Invitation	Will not attend	No
🔲 🛞 Guest of Mrs. Jessica L. Rad	. Invitation	Registered	No-show
🔲 🛞 Rader, Skyler A.	Invitation	Registered	

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



6. Select Attended.

#### NOTES



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

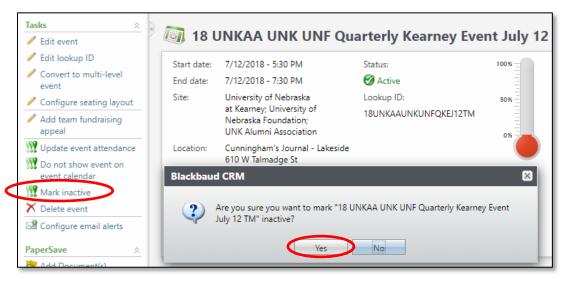
Tasks/Coordinators	Registrations	Speakers	Expenses	Options	Invitations	Appeals	Documentation	Job O
Registrations (6) 🔂 Add 🖾 More -								
Type:       ▼       Registrant:       ▼         Status:       ▼       Attended:       ▼								
Registrant		Туре		Status		A	ttended	
🔲 🛞 Jones, Josie	Ν.	Invitation		Registe	ered	Ye	s	
🔲 🎯 Krebs, Steph	anie A.	Invitation		Decline	ed	No	D	
🔲 🎯 Provost, Chri	stina M.	Preregistrati	ion	Cancel	ed	No	o	
🔲 🛞 🔷 Rader, Jes	sica L.	Invitation		Will no	ot attend	No	o	
🔲 🛞 Guest of Mrs	. Jessica L. Rad	Invitation		Registe	ered	No	o-show	
🔲 🎯 Rader, Skyler	· A.	Invitation		Registe	ered	Ye	S	

# 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.)

☆ Event calendar ☑			
	🔤 Calendar 🔲 List 🔊		
Jump to date: 7/9/2018	July 2018		
Group by: Category	Sunday	Monday	Tuesday
Group by: Category	01	02	03
Events 💌	15 NAA Travel Adventure Southern Cult	ure	
Sites:		11:15 AM 18 UNF UNL IANR Swarts Sch	
All sites 🖍 🛃			
Locations:			
All locations	08	09	10
Categories:	15 NAA Travel Adventure Southern Cult	ure	
Selected categories			18 UNF UNL Health Center UNMC
			18 UNF UNL Health Center UNMC
Include inactive			18 UNF UNL Health Center UNMC
Only show my events			6:30 PM 18 UNL IANR Northeast Ne
Show tasks			
Include completed tasks	15	16	17

- 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.

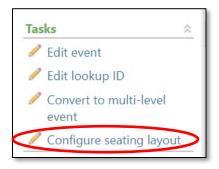
#### NOTES

## **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.

Seating layout:	Sections, Tables, and Seats	~	Copy from a previous event	
No. of sections:	1			
No. of tables per section:	4			
No. of seats per table:	8			
	Total seating capacity: 32	Reset		

- 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.

			ο ι	Jse continuous numbering
Section number	Name	Number of tables	Starting table num	Ending table num
1	Gold	4	1	4

- 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.

NOTES

- 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.

ections:	Gold		~	<b>I</b>	Jse continuous numbering
Table r	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

- 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.

Seating layout Se	ections 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			
0	Cost 0			•

#### 4. Click Save.

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

## **Assign Seats**

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

Registrants 🛛 🔲 A	ssign to section	🚨 Add to grou	D Show: Al	l registrants	*	Seats 🛛 📾 New section 📓 Delete section 🗳 Clear section 🗎 🎓	+
Name	Host	Group	Guest co	Seat	Seating	Ging 17 UNF Annual Meeting of Trustees     Ging 1 - Section 1	*
Allen, Camille R.			0	Section 1\T	-	□ □ 1 - Section 1 □   1 - Table 1	
Anderson, Brian W.			0	Section 1\T		🖡 1 - Seat 1 (Mrs. Amy M. Volk)	
Anderson, Daniel L.	Anderson,		1	Section 1\T		🛼 2 - Seat 2 (Chancellor Jeffrey P. Gold M.D.)	
Anderson, Sue A.	Anderson,		0	Section 1\T	÷.	📙 3 - Seat 3 (Dr. Michael F. Sorrell M.D.)	
Andreesen, Camer			0	Section 1\T		🖣 4 - Seat 4 (Mrs. Shirley Sorrell)	
Antholz, Amber J.			0	Section 1\T		Fig. 5 - Seat 5 (Mr. John Sorrell) Fig. 6 - Seat 6 (Kerri Sorrell)	
Arnold, Jennifer A.				Section 1\T		👫 0 - Seat 0 (Kerri Sorrell)	
1.0010.00100.0010000000000000000000000						- Seat 8 (Dr. John A. Niemann Ed.D.)	
Arth, Mary C.			0	Section 1\T		🖡 9 - Seat 9 (Mrs. Nancy Noddle)	
		Add 🧪 Edit 🍞				<ul> <li>Image: A - Table 4</li> <li>Image: A - Table 5</li> <li>Image: A - Table 5</li> <li>Image: A - Table 6</li> <li>Image: A - Table 7</li> <li>Image: A - Table 7</li> <li>Image: A - Table 8</li> <li>Image: A - Table 8</li> <li>Image: A - Table 9</li> <li>Image: A - Table 10</li> <li>Image: A - Table 11</li> <li>Image: A - Table 12</li> <li>Image: A - Table 13</li> <li>Image: A - Table 15</li> </ul>	

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.

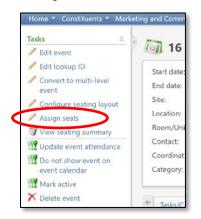
The **Seats** frame displays each section in your seating layout.

NOTES

### 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.

Registrants	💷 Assign	to section 🕯	Add to group	She	ow: All registra	ants	*		
Name	Host	Group	Guest co		Seat	Seating no			
Acker, Kerry				0	Table 32\Se		-		
Acklie, Phyll				0					
Adkins, Rich				0					
Albers, Kath				0			1.05		
Allen, Camil				0	Table 26\Se		-		
Allgood, Sa				0					
Andreesen,				0	Table 7\Sea				
Angle, Cath				0					
							1000		
Groups	Family	<b>O</b> A	.dd 🚩 Edit 🗙		ete group	Assign to sect	tion		
	Family		.dd / Edit 🗙		ete group	Jroup	tion		
Groups	Family		.dd Edit 🗙		ete group	proup	tion	ily	
Groups	Family		.dd 🗡 Edit 🗙		ete group	oup name: Hon Registrant	tion oree Fam		
Groups	Family		.dd 🖊 Edit 🗙		ete group	proup	tion oree Fam		
Groups	Family		.dd Edit 🗙		ete group	oup name: Hon Registrant	tion oree Fam		
Groups	Family		.dd Edit 🗙		ete group	oup name: Hon Registrant Admiral Anni	tion oree Fam		٩
Groups	Family		.dd Edit 🗙		ete group	oup name: Hon Registrant Admiral Anni	tion oree Fam		٩

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

NOTES

jistrant Search				•
Last/Org name: First name: Lookup ID:				Clear
Results				
Registrant	Host	Attended	Number of guests	Lookup ID

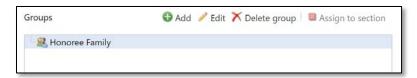
- 7. Search for the registrant to add to the group and click Select.
- 8. Click Save.

### Assign Groups to Seats

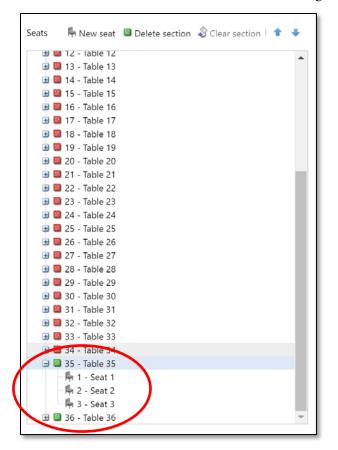
In the **Groups** frame of the seating window, you can quickly assign an entire group to seats at a table or a row in a section.

#### To Assign a Group to Seats:

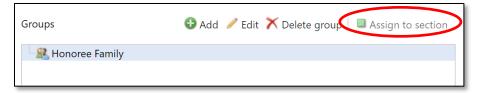
- 1. Open the event record.
- 2. On the explorer bar, click Assign Seats.
- 3. In the Groups frame, select the group to seat.



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

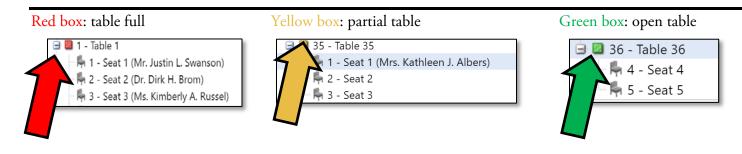


5. In the Groups frame, click Assign to section.



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

#### NOTES



## **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**

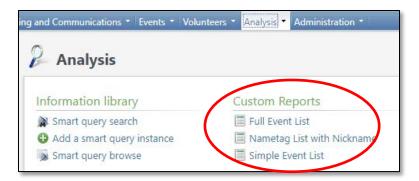
Event reports allow you to view information about your events and seating plans.

### **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.



- 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**.

🧊 Simple Ever	nt List						
Event Search: %UNF		Event Name: 18 UN	NF President's Pre	game - UNO vs. Miami		T	View Report
14 4 1 of 5 ?	Þ ÞI	Find   Next 🛛 🔍 🔹 📀					
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			Date	
18 UNF President's Pregame - UNO vs. Miami	732	John F.	No Reply				
18 UNF President's Pregame - UNO vs. Miami	165	Bruce N	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	

#### NOTES

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.** 

g and Communicatio	ons 🔹 Reve	enue 🔹 E	Events 🝷 🛛 P	rospects 🔹	Volunteers -	Fundraising •	Analysis 🔻	Administration -	PaperSave •	NUFFO -
🇊 Full Eve	ent List	t								
Event Search:	Nebraska				Event Name:				~	

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.

ng and Communications * Revenue * Events * Prospects * Volunteers * Hundraising * Analysis * Administration * PaperSave * NUFFO *	
Full Event List	G
Event Search: Nebraska Event Name: 17 UNF UNMC Nebraska Neuroscience Alliance v	View Report

- 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.)

🇊 Full Event L	ist								
Event Search: Nebras	ka	Event N	ame: 17 UNF UN	IMC Nebraska N	euroscience Alliance	~			
I	Þ Þi	ind Next	<b>4</b> - 📀						
Event Name	Constituent Lookup ID	Full Name		h report data a delimited)	Nickname	Last Name	Constituent Deceased	Spouse Deceased	Event Gue Name
17 UNF UNMC Nebraska Neuroscience Alliance	18558255	Mary Abbou	PDF MHTML (we			Abboud	No	No	
17 UNF UNMC Nebraska Neuroscience Alliance	174989	Michael N.	Excel TIFF file Word			Abramson	No	No	
17 UNF UNMC Nebraska Neuroscience Alliance	113108	Steven E. A	Achelpohl	Steven		Achelpohl	No	No	

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.**

Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

Reports	~
Steent comparison	
🗊 Event profile	
Event revenue	

Svent Profile	
Event: 17 UNF Potiuck	View report

- 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.

			S	how sections
Event: 17 UNF Potluck	P Show sections:	Selected sections	*	Select all Unselect all
				Coordinators     Event Details     Expenses     Financial Summary     Location     Notes     Registration Options     Registratis     Seating     Non-Responders     Speakers     Lodging Options     Lodging and Travel     Job Occurrences     Restriction Summary     Designations

6. Click View report.

Jump to Table of Contents

NOTES

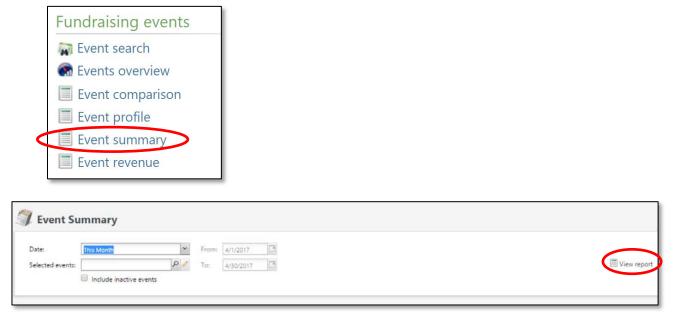
Baseline training materials © 2015 Blackbaud; additional materials © 2018 University of Nebraska Foundation. Confidential and Proprietary. For internal use only; any other use prohibited without the permission of all Copyright owners.

## **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**

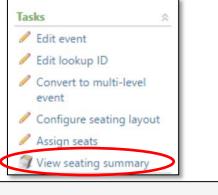
With the Event Seating Summary report, you can view information about how you seated registrants for an event.

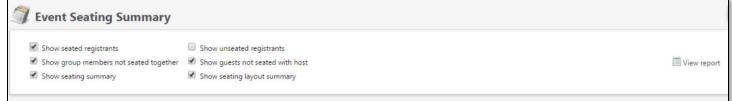
You can run this report to display:

- 0 Seated registrants.
- o Group members not seated together.
- 0 A seating summary.
- 0 Unseated registrants.
- o 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.

#### NOTES

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

Svent Comparison	
Event 1:     P Event 2:     Selection:	Uiew report

- 5. If you want to compare events included in a selection, choose **Selection** and then search for and choose the selection.
- 6. 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:

1. Open the event record.

On the explorer bar in the **Reports** task group, click **Event revenue.** 



- 2. If you want to include sub-events, mark the Include sub-events checkbox.
- 3. 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.
- 0 Event reports allow you to view information about your events and seating plans.



# 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

## Table of Contents

EVENT DOCUMENTATION in Ali CRM	2
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

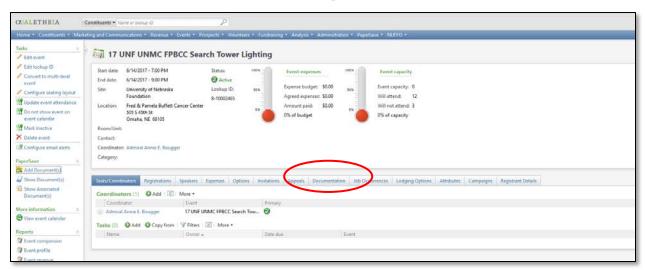
# OL ALI CRM

## 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**.

CALETHEIA C	onstituents * Name or loorup ID
Home * Constituents * Market	ting and Communications * iRevenue * Events * Prospects * Volumteers * iFundraising * Analysis * Administration * iPaperSave * INUFFO *
Tasks Edit event Edit lockup ID Convert to multi-level event Configure seating layout Update event attendance D not show event on	Your UNINC FPBCC Search Tower Lighting         Start date:       6/14/2017 - 7:00 PM       Status       Your       Your       Your       Your         End date:       6/14/2017 - 9:00 PM       Ø Active       Iookup ID:       Status       Your
event calendar Mark inactive Delete event Configure email alerts PaperSave	SIGS 434h St Omaha, NE 68105 Room/Unit: Contact: Coordinator: Admiral Annie E. Bougger Category:
Add Document(s)     Show Document(s)     Show Associated     Document(s)	Tasks/Coordinators       Registrations       Speakers       Expenses       Options       Invitations       Appeals       Documentation       Job Occurrences       Lodging Options       Attributes       Campaigns       Registrant Details         Documentation (0) ( Add ) Y Filters       Image: More +       Image: More +
More Information A	Documentation type Author Notification
Reports         2           Tevent comparison         2           Event profile         2           Event revenue         2	
Shortcuts Add this page to shortcuts O Manage my shortcuts	

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.

# OL ALI CRM

Tasks/Coordinate	ors Registrations	Speakers	Expenses	Options	Invitations	Appeals	Documentation	Job O
Documentati	on (0) 🔂 Add 🕶	<b>Filters</b>	More •	•				
Documen	<ul><li>Note</li><li>Media Link</li></ul>	Date			Туре		Tit	tle
<	Attachment							

- 3. Click on **Attachment**; a new window will open.
- 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.
   <u>Note:</u> Refer to <u>Types of Events-related documentation to be Saved</u> for additional details.

Add an at	tachment			
Event: Type: Title: File:	17 UNF UNMC FPBCC Search Tower  Contract Event Documentation Expenses Printed Materials Cricer me	Date: Author:	6/5/2017	9
🕜 Help			Save	ancel

- 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.

# **C A L I CRM**

Add an att	attachment	×
Event: Type: Title: File:	17 UNF UNMC FPBCC Search Tower       Date:       6/5/2017         Expenses       Author:       Admiral Annie E. Bougger         Hy-Vee Catering Bill <file not="" specified="">         Choose file         Clear file</file>	P
🕜 Help	Save	Cancel

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.

ind date: ite: ocation: loom/Unit: iontact:	6/14/2017 - 7:00 PM 6/14/2017 - 9:00 PM University of Nebraska Frond ation Fros & Remeta Buffett Cancer Cent 005 S 45m :5 Omaha, NE 66105 cr. Admiral Annie E. Boupget	Status: Active Lookup ID: 8-10002465	553 THE REPORT	Event expenses Expense budget \$0.00 Agreed expenses \$0.00 Amount paid: \$0.00 0% of budget	son E	Event capacity vent capacity: 0 Will attend: 30 Will not attend: 5 % of capacity			
arana da									
	inators Registrations Speakers		ns Invitations	App of Documen	tation Job courten	ces Lodging Optio	pres Attributes Camp	aigns. Registrant Details	
sis/Coord	inators Registrations Speakers tation (2) OAdd • V Filters peritation type + Date		ns Invitations	App of Statement	Title		ons Attributes Camp	aigns. Registrant Details	Event .
ocumen Docum	tation (2) ● Add • ♥ Filters sentation type ★ Date	☑ More •				A			Event . 17 UNF UNMC FPBCC Search Tower Light
sks/Coord Occumen Docum Attacher JP Open Type: Exp Title: Hy-	tatation (2)	More •  Date: 6/5/20  Author: Admira	Type Expense	5	Title	A	Author		

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

Start date: End date: Site: Location: Room/Unit: Contact: Coordinator Category:	6(14/2017 - 5:00 PM 6(14/2017 - 5:00 PM University of Netbraska Foundation Fired & Pamela Buffett Cancer Center 505 5 45:05 Omaha, NE 68105	Statuc 100 Active Lookup ID: 90 8-10002465 9	Even expenses	son Ev W	vent capacity: 0 iii attend: 30 iii attend: 5 6 of capacity		
(asks/Coordi	nators Registrations Speakers	Expenses Options	Invitations Appeals Documentation	on Job Occurrenc	es Lodging Options Attributes	Campaigns Registrant Details	
	tation (2) OAdd • Y Filters	E More •		12020		10/2010/00/2010	12.51
	entation type . Date		Type	Title	Author	Notification	Event
Attachm			Expenses	Hy-Vee Catering Bi	II Admiral Annie E. Bo Agenda & Notes Admiral Annie E. Bo		17 UNF UNMC FPBCC Search Tower Lig 17 UNF UNMC FPBCC Search Tower Lig

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

Start date:	6/14/2017 - 7:00 PM	Status:	100%	Event expenses	Event c	apacity		
nd date:	6/14/2017 - 9:00 PM	@ Active						
ite	University of Nebraska Foundation	Lookup ID:	50%	Expense budget: \$0.00 Agreed expenses: \$0.00	son Event cap	sacity: 0 sd: 30		
ocation	Fred & Pamela Buffett Cancer Center 505 S 45th St Omaha, NE 68105	8-10002465	-	Amount paid: \$0.00 0% of budget	0% of ca	attend: 5		
Room/Unit			-					
Contact:								
oordinato	n: Admiral Annie E. Bougger							
ategory:								
negoly.								
asis/Coord Documen	inators Registrations Speakers tation (2) OAdd • Y Filters			Appeals Documenta		odging Options Attributes C		
nds/Coord Ocumen Docum	tation (2) ●Add • ¥ Filters sentation type ▲ Date		ns Invitations Type	Appeals Documenta	ion Job Occurrences 1	odging Options Attributes C Author	ampaigns. Registrant Details	Event
nds/Coord Ocumen Docum	tation (2) ●Add • ¥ Filters sentation type ▲ Date			Appeals Documenta				Event -
asks/Coord Documen Docum B Attachm	tation (2) QAdd • Y Filters Date						Notification	Event . 17 UNF UNIKC FPBCC Search Tower Ligt
asis/Coordi Documen Docum 3 Attachm 8 Attachm	tation (2) OAdd • Y Fitters isentation type + Date		Type		Title	Author	Notification	
ocumen Docum Docum Attachm Attachm	tation (2) ● Add • ♥ Filters □ eventation type ▲ Date neent ment 6/5/2017 n file ♥ Edit ★ Delete	E More •	Type Expense		Title	Author	Notification	
Attachm Type: Exp	tatation (2)	3] More ▼ Date: 6/5/2013	Type Expense	55	Title	Author	Notification	
Attachm Document Document Attachm Attachm Dopen Type: Exp Title: Hy-	tatation (2)	E More •	Type Expense	55	Title	Author	Notification	
adax/Coord Document Docum Attachm Attachm Dopen Type: Exp Title: Hy-	tatation (2)	3] More ▼ Date: 6/5/2013	Type Expense	55	Title	Author	Notification	

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

Type:	Expenses	➤ Date:	6/5/2017	
Title:	Hy-Vee Catering Bill	Author:	Admiral Annie E. Bougger	Q
File:	2017DismalRiver-Golf Club Rate	Sheet.pdf		
	noose file ear file			

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



How to Delete an Event Document

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

Start date: End date:	6/14/2017 - 7:00 PM 6/14/2017 - 9:00 PM	Status:	100%	Event expenses	100%	Event capacity			
Site:	University of Nebraska	Lookup ID:	50%	Expense budget: \$0	50%	Event capacity: 0 Will attend: 30			
Location	Foundation Fred & Pamela Buffett Cancer Center 505 S 45th St Omaha, NE 68105	8-10002465	-	Agreed expenses: \$0 Amount paid: \$0 0% of budget		Will not attend: 50 Will not attend: 5 0% of capacity			
Room/Unit	1		-		-				
Contact:									
Coordinato	n: Admiral Annie E. Bougger								
ategory:									
		l ar					. in all.		
asks/Coord	inators Registrations Speakers I atation (2) OAdd • Y Filters I		s Invitations	Appeals Docum		intences Lodging O	ntions Attributes Car	mpaigns. Registrant Details	
asis/Coord Documen			ns Invitations	Appeals Docum	Inte	unences Lodging O	ntions Attributes Car Author	mpaigns. Registrant Details	Event .
asks/Coord Documen	tation (2) ● Add • ♥ Filters II sentation type + Date			Appeals Docum		urrences Lodging O			Event
asis/Coord Documen Docum	atation (2) OAdd • Y Filters Rentation type + Date							Notification	Event 17 UNF UNFUNMC FPBCC Search Tower Ligh
asks/Coord Documen Docum	tation (2) ●Add ・ ¥ Filters sentation type → Date tent ment 6/5/2017		Type		Title		Author	Notification	
asis/Coord Documen Docum Attachm	tatation (2)		Type. Expense		Title		Author	Notification	
adix/Coord Documen Docum Attachm Attachm Attachm Doper Type: Exp	tatation (2)	More •	Type Expense	5	Title		Author	Notification	
Documen Docum El Attachm El Oper Type: Exp Tible: Hy	tatation (2) Q Add + V Fitters (2) ventation type A Date tent nent n file V Ext Delete penses	More • Date: 6/5/2017	Type Expense	5	Title		Author	Notification	

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

## Table of Contents

Adding an Imported Selection	2
Steps to importing	2
Steps to importing with visuals	3
Deleting an imported selection	5
Steps to deleting	5
Steps to deleting with visuals	6

# OL ALI CRM

## 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.

# OL ALI CRM

### 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.

Information library	Dashboards	Reports
Information library	RPI dashboard	Constituent reports
🐊 Ad-hoc query search	🗑 Web dashboard	Appeal reports
🔉 Smart query search		Revenue reports
Smart query browse		🛃 Membership reports
		Prospect management reports
		Exent reports
		📕 Fundraising reports
		le Volunteer reports
		Marketing reports
$\frown$		📙 Treasury reports
Selections	Reporting services	Sales reports
Import selections	Report explorer	🗐 Sales by membership
View selections	🎲 Report model generator	
OLAP	Advocacy reports	
R OLAP Excel reports	Advocacy action item detail	
OLAP Excel reports OLAP explorer	Advocacy action item detail	

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



# **C A L I CRM**

4. Populate the following fields:

Add selection				×
_				
Name:	17 UNL CBA Dinner Invitees		]	
Description:	Retention: temporary For event upload 17UNLCBADinner			
Record type:	Constituent	~	]	
Category:	Import	¥	]	
Site:	All sites	• P	]	
	Show this selection in the Question	iery D	esigner)	
Import file i	nformation			
Import file: n (3) Choose fi (3) Clear file	-			
ID column:	CnBio_ID	*		
ID type:	Lookup ID	~		
🕜 Help	Save and Impo	rt	Cancel	

- 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.

# **C**ALI CRM

Tasks	P Import Se		Invitees - I	mport selection	
Edit process	Name:	17 UNL CBA Dinner Invitee	s Show in query d	esigner: No	
Collete  Shortcuts	Record type:	Constituent	Description:	Retention: temporar For event upload 17UNLCBADinner	у
Recent searches ×	Category:	Import			
Recently accessed ⇒	Site:	All sites			
	Recent Status Recent statu Status: Status message	History IS Download outpu Completed We: Completed	it• 🖸		
	Started by: Started: Ended: Duration:	NUFOUNDATION\jrade 3/29/2017 2:44:31 PM 3/29/2017 2:44:44 PM 13 seconds	Tot Nu	ver name: tal records processed: mber of exceptions: cords successfully processed:	HEBRON 6340 0 6340

## 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.**

# **C**ALI CRM

### Steps to deleting with visuals

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

Information library	Dashboards	Reports
information library	RPI dashboard	Constituent reports
Ad-hoc query search	🐨 Web dashboard	Appeal reports
Smart query search		Revenue reports
Smart query browse		Membership reports
		Prospect management reports
		Event reports
		Fundraising reports
		Volunteer reports
		Marketing reports
		E Treasury reports
Selections	Reporting services	Sales reports
Import selections	3 Report explorer	Sales by membership
View selections	😭 Report model generator	
OLAP	Advocacy reports	
OLAP Excel reports OLAP explorer	Advocacy action item detail	

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

Import selections (8)				
Search		🗌 🔚 Save list 🚵 Open list 🕷	Clear all filters	
Name	Record type	Category	Show in query designe	r 🍸 Sta
17 NAA Another Test Eve	ent Constituent		No	Imp
7 UNL CBA Dinner Invite	ees Constituent	Import	No	Imp
🎯 Import 🛛 🥒 Edit 🗡 I	Delete 🖄 Assign permi	ssions		
3 17NUFUNLASHAR	Constituent		No	Imp
Schicago ARCH Event Invi	tees Constituent	Import	No	Imp
	Constituent		Yes	Imp
SUR import selection				
KJR import selection UNL EHS previous donors	s i Constituent	Alumni	No	Imp
-		Alumni	No Yes	lmp Imp
UNL EHS previous donor	Constituent	Alumni Alumni		



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

## Table of Contents

Event Registrant Emails	
Running the Smart Query:	

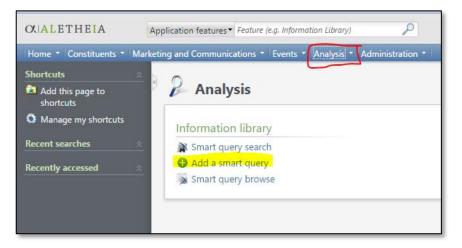


### **Event Registrant Emails**

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**.

Name:	event registrant e	mails	Search
Record type:		<b>v</b>	Clear
Results (1 re	cord found)		
Name		Description	Record type
Event Registr	ant Emails	Event registrants email addresses	Event



- New Smart Query

  Parameters

  Results

  Set save options

  Event Event record:

  P

  Parameters

  Results

  Set save options

  Parameters

  Results

  Set save

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

4. Select the event that you need.

Name:	17 unkaa	Site:			* P	Search
Location:		Room/Unit:				Clear
Lookup ID:						
	Only include main events					
Results (28 re	cords found)					
Lookup ID	Name		Start date 🔺	End date	Location	Contac
17UNKAAB	17 UNKAA Kearney 1967 KSC Baseball	50th Reunion	4/21/2016	4/21/2016		4
17UNKAAK	17 UNKAA Kearney CNSS Loper BB Pres	game Jan 5	1/5/2017	1/5/2017		
17UNKAAO	17 UNKAA Omaha Area Lopers After Ho	ours Jan 25 2	1/25/2017	1/25/2017		
17UNKAAC	17 UNKAA Culver City So Cal Loper Soc	ial Feb 18	2/18/2017	2/18/2017		
17UNKAAS	17 UNKAA Santa Ana So Cal Luncheon	Feb 18 2017	2/18/2017	2/18/2017		
17UNKAAT	17 UNKAA Tucson Lopers After Hours F	eb 23	2/23/2017	2/23/2017		
17UNKAAC	17 UNKAA Chandler Lopers After Hours	s Feb 24	2/24/2017	2/24/2017		
17UNKAAG	17 UNKAA Glendale Loper Luncheon Fe	eb 25	2/25/2017	2/25/2017		
17UNKAAD	17 UNKAA Dallas/Frisco Alumni Social N	March 4 2017	3/4/2017	3/4/2017		
17UNKAAK	17 UNKAA Kearney Theater April 8		4/8/2017	4/8/2017		
17UNKAAK	17 UNKAA Kearney Operation Graduati	on April 19	4/19/2017	4/19/2017		
17UNKAAE	17 UNKAA Emeriti Brunch May 31 2017		5/31/2017	5/31/2017	Holiday Inn	
•						•

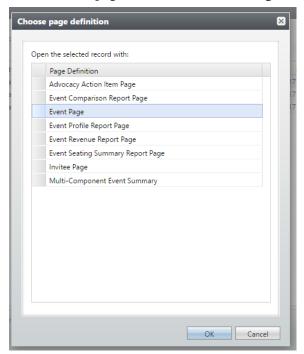
SMART QUERY: EVENT REGISTRANT EMAILS

# **C A L I C R M**

#### 5. Click the **Results** tab.

Vame	Status	Constituent\Email Addresses\Email address type	Constituent\Em	Event\Event lookup ID	Event\Event name	
/Ir. Frank D. Ku	Registered	Personal		17UNKAAHHOFB	17 UNKAA UNK Hom	
/r. Lee H. Gud	Registered	Personal	d_handy@yaho	17UNKAAHHOFB	17 UNKAA UNK Hom	
Ars. Amy L. Kuc	Registered	Personal	amykuchera@g	17UNKAAHHOFB	17 UNKAA UNK Hom	

- a. From the **Results** tab you can view up to 500 records.
- b. 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.

/ Edit event	3 17 UNKAA UNK Homecoming Athletics Hall of Fame Dinner Sept 15	2
Set Sologi D     Convert to multi-level     mont:     Convert to multi-level     mont:     Configure testing legood     Add team functioning     appeal     Update event attendance     Do not shop event on     mont caleboa     Mulk inscrive     Dete event     Configure email alerts     teachase	at Example, University of TUNICALHHOFE Apreté repetieurs 5000 Will estimite 10 Netzusia Evolutione Statution Amount parti 5000 Will not attende 0 UNK Auren Association (%)	
Add Documentin)		
Show Documential	Rada/Caordinations Registrations Speakers Expenses Options Invitations Appendis Documentation Job Occumences Lodging Options Attributes. Campeigns Registrant Datales	
Show Associated	Coordinators (1) Add II More*	
	Constrainty Partiel     Constrainty Partie     Max Treat M Devloy     TUNKLA KHomepointing Adv.     The Max Advance Constrainty Adv.     The Max Advance Constrainty Constrainty	
Document(s) lore information = View event calendar Manage 87%	I Witz Treas M. Darburg IT UNICAL UNIC Homeoorning Adv. O Taskis (II) O Add O Copy Ison (IV Filters III) More •	
lore information a	a Go Min, Trice M Darburg 17 UNIXA UNK Kometoming Adv. Ø	
ore information   Ven event clandar  Manage U20  reports   Cent comparison  Levet profile  Levet profile  Sectors	Arc. Troub M. Darburg 17 UNICAL UNC Homepoining Abu.      Tasta (II) Q.Ad. Q.Copy Ion I V Face: (II) Mou-     Tasta (II) Q.Ad. Q.Copy Ion I V Face: (II) Mou-     Tasta (II) Q.Ad. Q.Copy Ion I V Face: (II) Mou-     Tasta (II) Q.Ad. Q.Copy Ion I V Face: (III) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (III) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (III) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIIII) Q.Copy Ion I V Face: (IIII) Q.Copy Ion I V Face: (IIIII) Q.Copy Ion I V Face: (IIIII) Q.Copy Ion I V Face: (IIII) Q.Copy Ion I V Face: (IIIII) Q.Copy Ion I V Face: (IIII) Q.Copy Ion I V Face: (IIIII) Q.Copy Ion IIII Q.Copy Ion IIIII Q.Copy Ion IIII Q.Copy Ion IIIII Q.Copy Ion IIII Q.Copy Ion IIIII Q.Copy Ion IIII Q.Copy Ion IIIII Q.Copy Ion IIIII Q.Copy I	
ore information  View event calendar View event calendar Manage KPis  Fort some and the second secon	Max Trans M. Duelourg 17 UNICAL UNIX Homesoning Albu,      Tasks (2) O Add O Copy trans " Finiser: 20 Mare +     Itame O Conver - Duelo due  recental formed	38
ore information  Vess event calendar Vess event calendar Vess event calendar Vess event camparison  Coert comparison  (Coert crocke Coert crocke Coe	Arc. Troub M. Darburg 17 UNICAL UNC Homepoining Abu.      Tasta (II) Q.Ad. Q.Copy Ion I V Face: (II) Mou-     Tasta (II) Q.Ad. Q.Copy Ion I V Face: (II) Mou-     Tasta (II) Q.Ad. Q.Copy Ion I V Face: (II) Mou-     Tasta (II) Q.Ad. Q.Copy Ion I V Face: (III) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (III) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (III) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIII) Mou-     Tasta (III) Q.Ad. Q.Copy Ion I V Face: (IIIII) Q.Copy Ion I V Face: (IIII) Q.Copy Ion I V Face: (IIIII) Q.Copy Ion I V Face: (IIIII) Q.Copy Ion I V Face: (IIII) Q.Copy Ion I V Face: (IIIII) Q.Copy Ion I V Face: (IIII) Q.Copy Ion I V Face: (IIIII) Q.Copy Ion IIII Q.Copy Ion IIIII Q.Copy Ion IIII Q.Copy Ion IIIII Q.Copy Ion IIII Q.Copy Ion IIIII Q.Copy Ion IIII Q.Copy Ion IIIII Q.Copy Ion IIIII Q.Copy I	C C Stars gar
re Information View oversit Chiendar Manage K2% boots E Cent camparison Event profile Event tworkse inform a guery results (2) re results (2) results (2) re results (2) results (2) re	Max. Yoou M.D. Dealowy 17 UNICAL UNIX Homescoming Albor.       Tasks (W) Add. Dealowy 17 Tasks (C) Mone-      Insee Dear of the Insee      Toronto Journol      record Journol      Construct Final Addresses[Inse., Event Sealow ID      State      Construct Final Addresses[Inse., Event Sealow ID      Sealow      State      Construct Final Addresses[Inse., Event Sealow ID      Sealow       Sealow	
re Information View oversit Chiendar Manage K2% boots E Cent camparison Event profile Event tworkse inform a guery results (2) re results (2) results (2) re results (2) results (2) re	Mic Troub Duelourg     TO UKKA UKK Homesoning Adv.      Totals     Duelourg     TO UKKA UKK Homesoning Adv.     Duelourg     Totals     Totals     Duelourg     Totals     Tot	
ore information  Vess event calendar Vess event calendar Vess event calendar Vess event camparison  Coert comparison  (Coert crocke Coert crocke Coe	Max. Yoou M.D. Dealowy 17 UNICAL UNIX Homescoming Albor.       Tasks (W) Add. Dealowy 17 Tasks (C) Mone-      Insee Dear of the Insee      Toronto Journol      record Journol      Construct Final Addresses[Inse., Event Sealow ID      State      Construct Final Addresses[Inse., Event Sealow ID      Sealow      State      Construct Final Addresses[Inse., Event Sealow ID      Sealow       Sealow	

- 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.