

WELCOME!

ALIALETHEIA**CRM**
Single Source Of Truth

Fundamentals of Ali CRM

Training for University Partners

January 2019

HOUSEKEEPING

- Introductions – Angie Taylor, UNF Technical Trainer
- Basic Navigation & Constituent Record Overview
- How to Enter an Interaction
- Online Content
- Schedule:
 - Break (5-minute) approx. 10:45 a.m. –OR– 2:30 p.m.
 - Conclusion: Noon –OR– 4:00 p.m.
- Restrooms
- Please sign in

UNITS



Introduction



Navigation



Individual
Records
+
Organization,
Committee,
& Household
Records



How to
Enter an
Interaction



Online
Content
+
Next
Steps



Summary
+
Support

BACK TO BASICS

1. Benefit the Mission of the University of Nebraska
2. Confidentiality
3. Security User Roles
4. “Newspaper Ready”
5. Ask questions: now and later
6. How to use your Essentials Guide



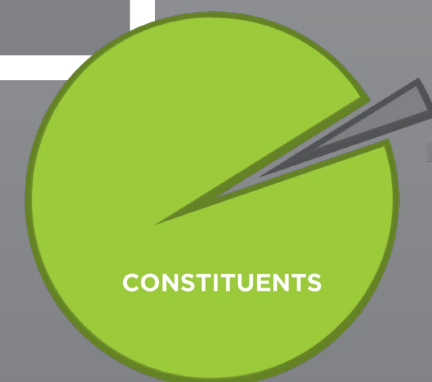
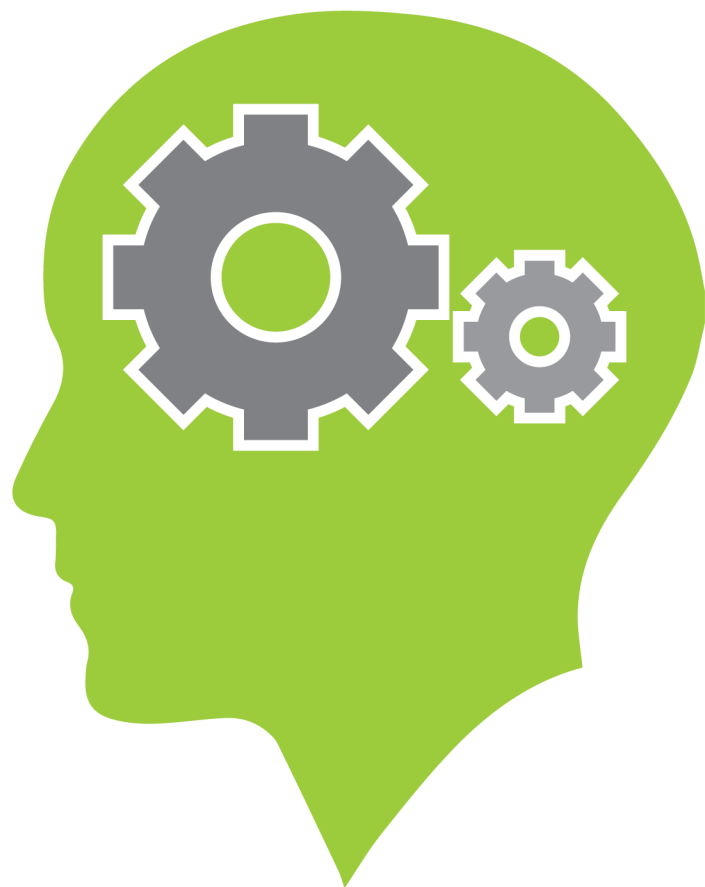
WHAT IS A CRM?

- **C**onstituent **R**elationship **M**anagement system for the central location for all data used for university advancement practices.
- Users include:



UNMC
ALUMNI ASSOCIATION

WHO ARE OUR CONSTITUENTS?



WHAT IS ADVANCEMENT?

Advancement activities live in Ali CRM.

NU Foundation Funds Online (NUFFO), which is the portal used by university partners to access their foundation-held funds and obtain select donor information, is part of Ali CRM.



WHY ALETHEIA?

In the Greek language, **Aletheia** is variously translated as *unclosedness* or *unconcealedness*.

In Greek mythology, Aletheia is considered the **Goddess of Truth**.

Ali CRM is the **single source of constituent contact information and documentation of your outreach activities** with supporters of the university.

360° view of donors, alumni and friends of the university

360° VIEW

One system of record vision: eliminate shadow databases, improve donor, alumni, and supporter experience



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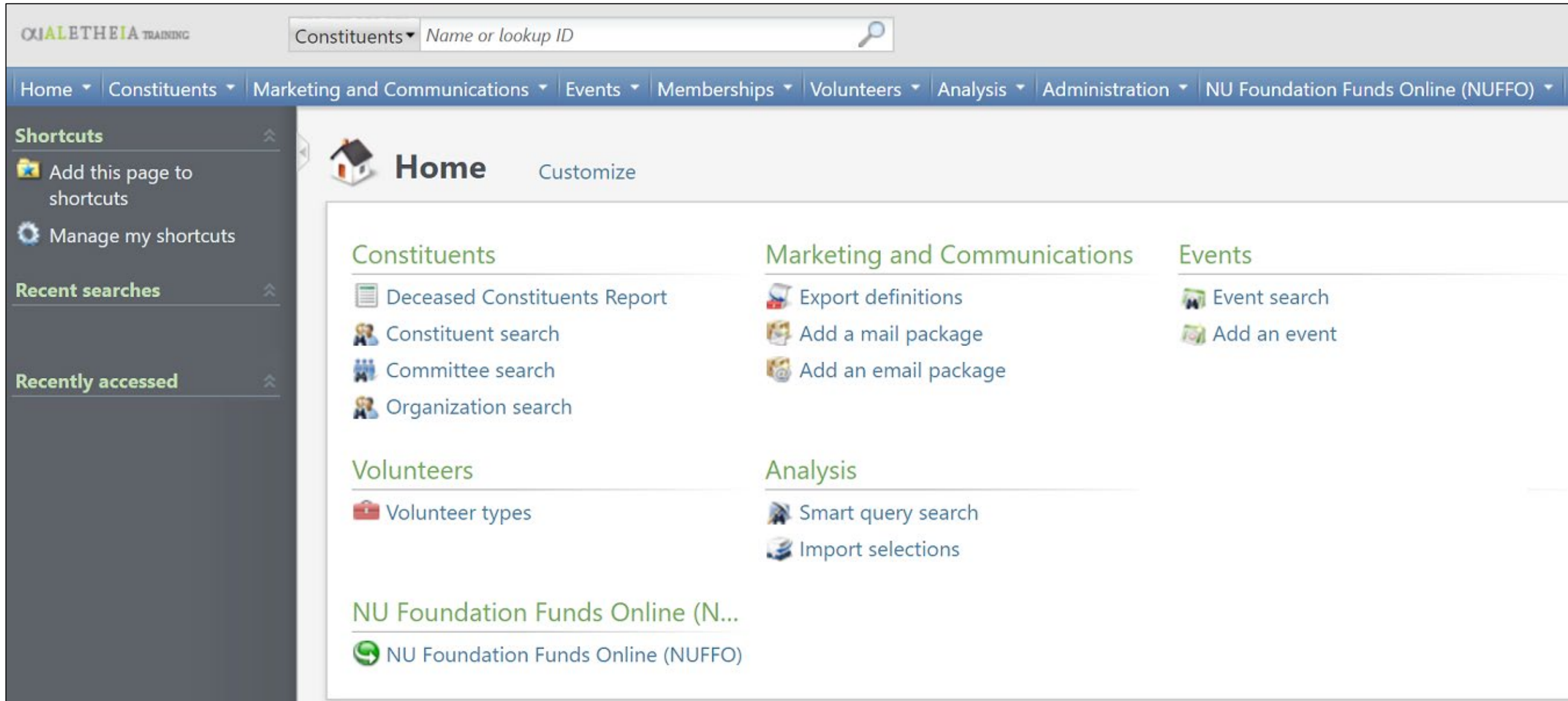


Summary
+
Support

BASIC NAVIGATION

- Identify and access **functional areas** in **Ali CRM**
- **Help** 
- Customize the **Home** page
- Explorer bar
 - **Shortcuts** 
 - **Recently accessed**
 - **Recent searches**
- **Multiple browser windows**

ANATOMY OF A FUNCTIONAL AREA



The screenshot displays the Aletheia CRM interface. At the top, there is a header bar with the Aletheia CRM logo and a search bar labeled "Constituents" with a placeholder "Name or lookup ID". Below the header is a navigation menu with tabs for Home, Constituents, Marketing and Communications, Events, Memberships, Volunteers, Analysis, Administration, and NU Foundation Funds Online (NUFFO). The main content area is titled "Home" and features a "Customize" link. It is organized into several functional area sections, each with a list of links and icons:

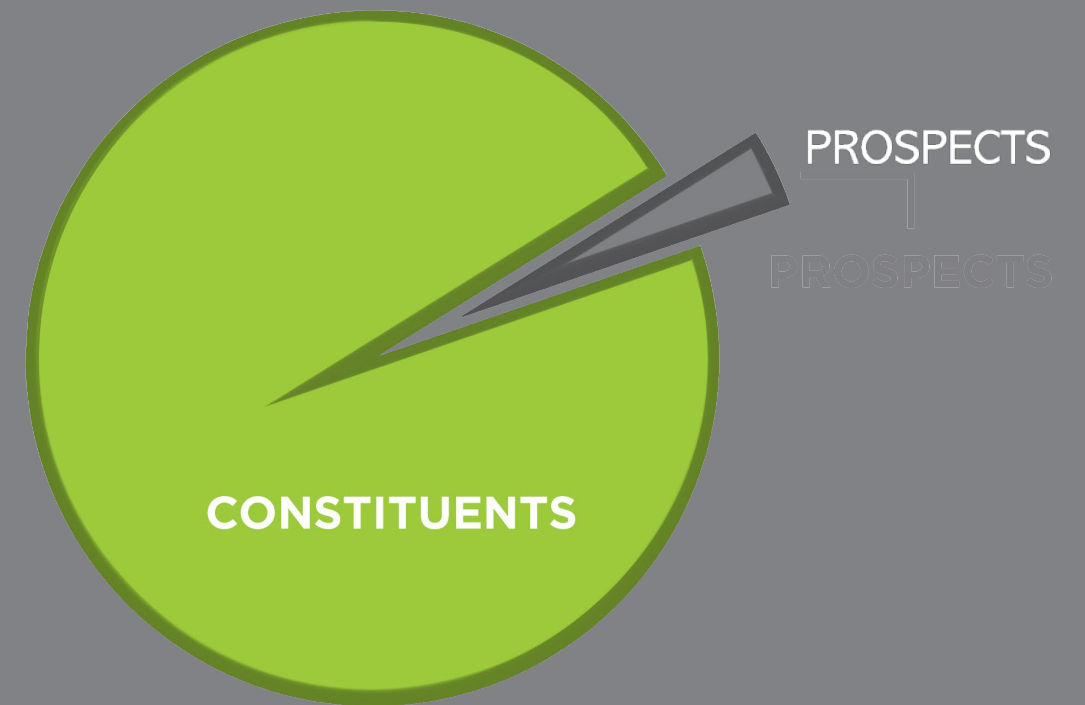
- Constituents**
 - Deceased Constituents Report
 - Constituent search
 - Committee search
 - Organization search
- Marketing and Communications**
 - Export definitions
 - Add a mail package
 - Add an email package
- Events**
 - Event search
 - Add an event
- Volunteers**
 - Volunteer types
- Analysis**
 - Smart query search
 - Import selections
- NU Foundation Funds Online (NUFFO)**
 - NU Foundation Funds Online (NUFFO)

On the left side of the interface, there is a sidebar with sections for "Shortcuts" (Add this page to shortcuts, Manage my shortcuts), "Recent searches", and "Recently accessed".

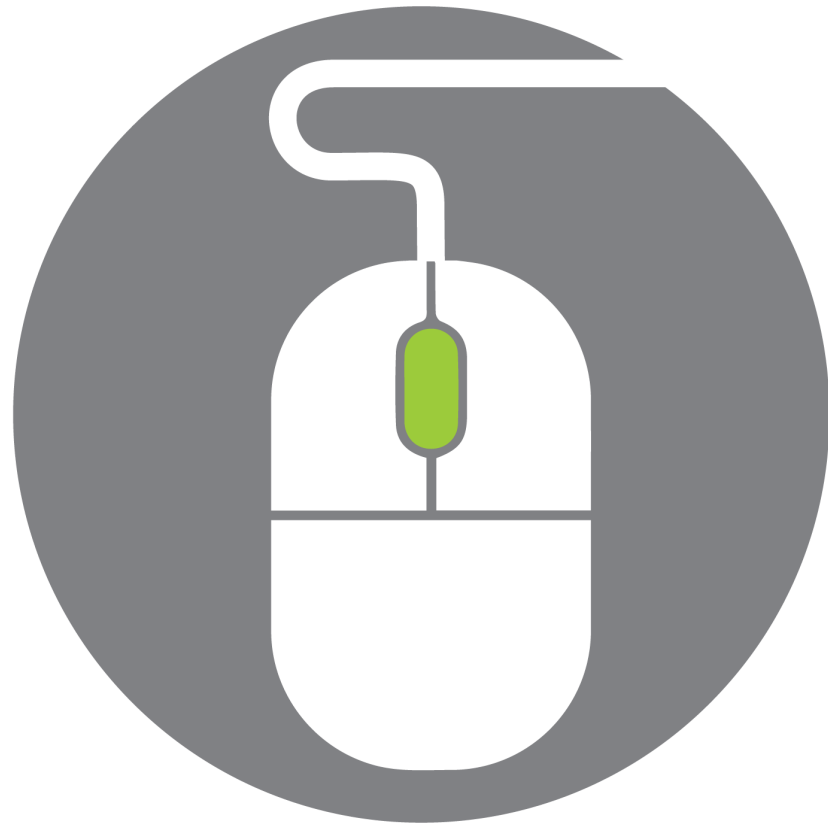


KEY TERMS TO KNOW

- Constituents
- Prospects
- Lookup ID
- Interaction



TRY IT



- Open the **Constituents** functional area
 - Add a shortcut to **Organization search**
 - Add a shortcut to a **report** of your choice

UNITS



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CONSTITUENT RECORD TYPES



THINK ABOUT IT

Who are my constituents?



Constituent information in Ali CRM will help determine if that constituent has an affiliation or affinity for the University of Nebraska advancement area you support.

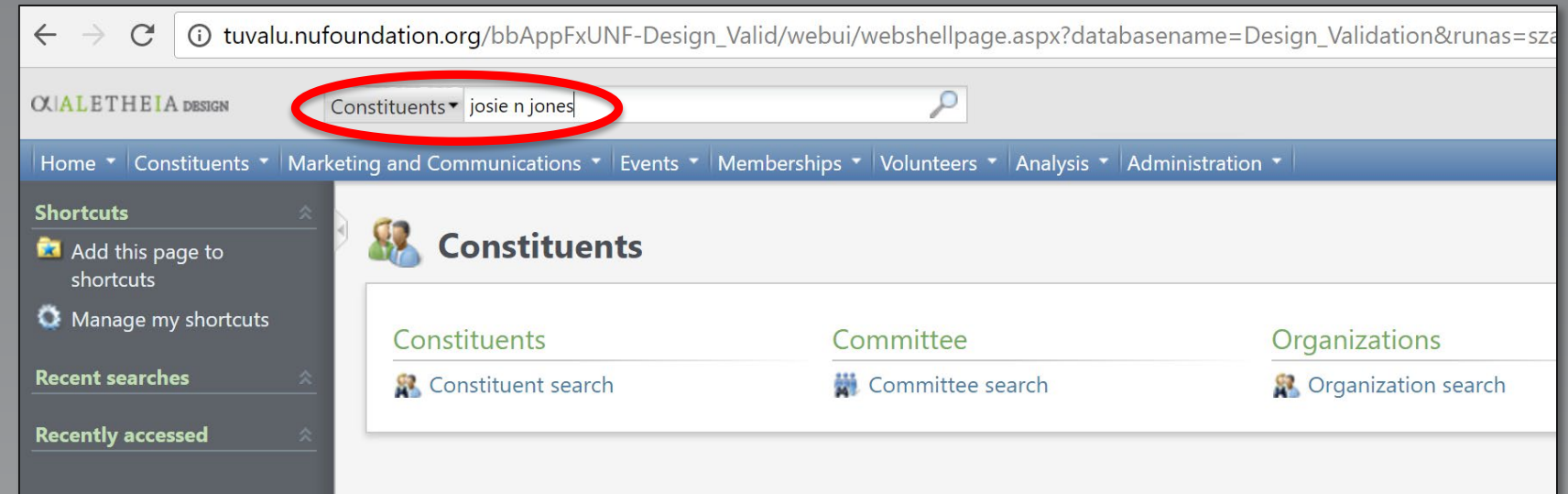
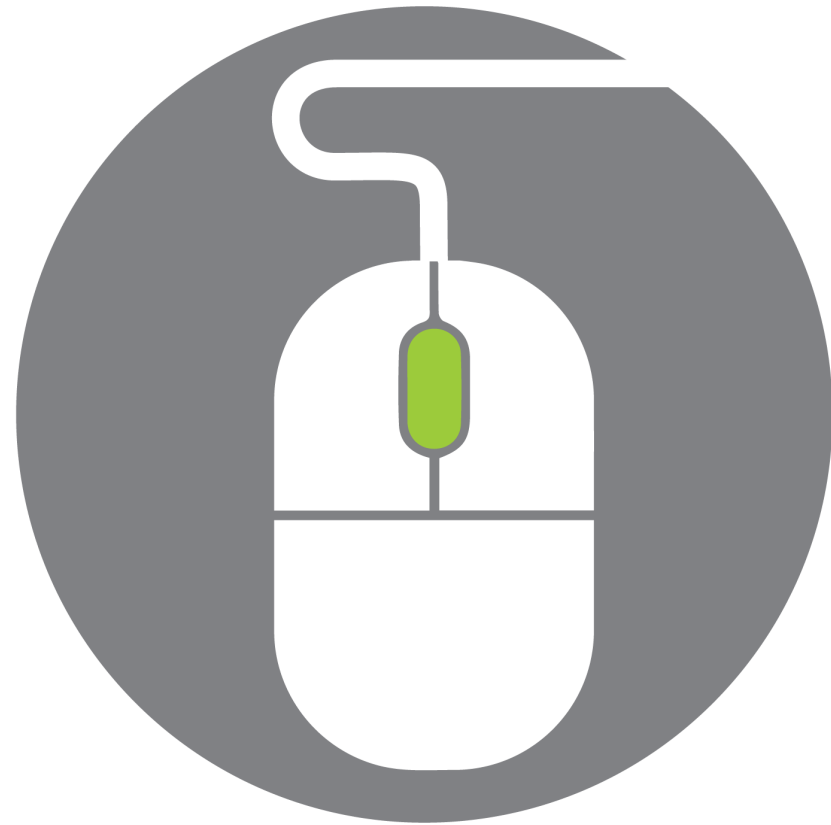
Users are expected to focus their engagement activities within this group of *natural constituents*. It is against policy to use Ali CRM to look up constituents out of curiosity only, including records of prominent community members, neighbors or friends.

WELCOME TO α |ALI CRM

The screenshot displays the ALETHEIA system interface with several annotations highlighting functional areas:

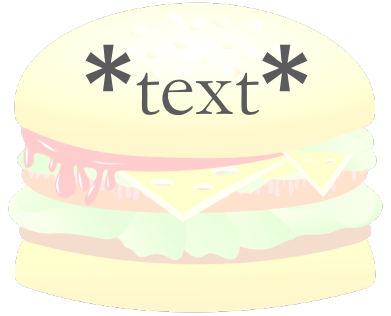
- Menu Bar:** Located at the top, containing navigation links like Home, Constituents, Marketing and Communications, Events, Analysis, and Administration.
- Functional Areas:** Indicated by a blue arrow pointing to the top navigation bar.
- Explorer Bar:** Located on the left side, containing shortcuts, recent searches, and recently accessed items.
- Tiles:** A red box highlights the main content area displaying information about Congressman Josie N. Jones, including personal information, contact details, addresses, and memberships.
- Customize tiles:** A red box highlights the "Customize tiles" button in the bottom right corner of the main content area.
- Tabs & Sub-tabs:** A green box highlights the tabbed interface for the Relationships section, showing various relationship types and a sub-tab for "Relationships".
- Double-down arrow or Chevron:** A blue arrow points to the double-down arrow icon used to expand the "Relationships" section.

TRY IT



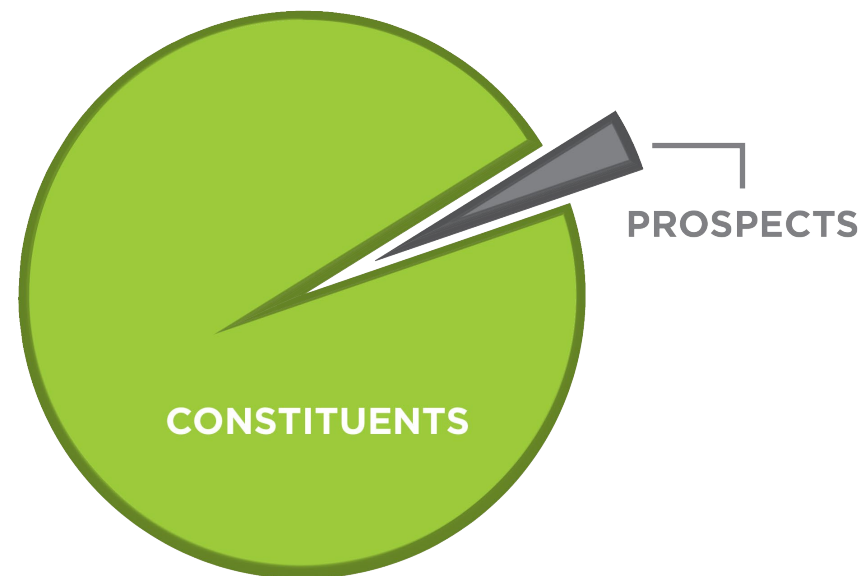
- Use the Quick Find search option to locate Josie Jones, a constituent
 - Open the **Help** panel
 - In the top search bar, search using the keyword **Solicit¹⁹ Code**

ADVANCED SEARCH



CONSTITUENT & HOUSEHOLD NAVIGATION

- Access the **Constituents** page
 - Careful! Difference between **Constituent** and **Prospect**
- Search for a constituent
 - Household Record




WHAT CAN I SEE ON A CONSTITUENT RECORD?

Constituent Record Guide TAB CONTENTS - UNIVERSITY USERS

UNIVERSITY of NEBRASKA FOUNDATION

Summary	Contact	Personal Info	Relationships	Revenue	Memberships	Volunteer	Prospect	Education	Documentation / Interactions	Communications	Attributes	Events
<ul style="list-style-type: none"> Recent & Upcoming Activities & Communications 	<ul style="list-style-type: none"> Addresses Phone Numbers Email Addresses Social Media Accounts 	<ul style="list-style-type: none"> Marital Info Birth Date Name Formats Aliases 	<ul style="list-style-type: none"> Individual Household Organizations Employment History Relationship Tree Relationship Map Group Member Committee 	<ul style="list-style-type: none"> Recognition Programs 	<ul style="list-style-type: none"> Alumni Association Memberships Women Investing in Nebraska Memberships 	<ul style="list-style-type: none"> Volunteer Summary Volunteer Types Traits Campus and UNF Awards 	<ul style="list-style-type: none"> Prospect Summary Prospect Manager History 	<ul style="list-style-type: none"> Involvement Higher Education History 	<ul style="list-style-type: none"> Documentation Interactions 	<ul style="list-style-type: none"> Appeals General Correspondence Preferences Newsletters Event Invitations 	<ul style="list-style-type: none"> Opt-Ins Gift to Donor 	<ul style="list-style-type: none"> Event RSVPs Historical Invitations

 This tab is available on select records that have those active constituencies.

 This tab is only present if the constituent has RSVP'd for an event.

Submit inquiries to: servicedesk@nufoundation.org

CONSTITUENT TABS

continued next slide

- Navigate the tabs on an individual constituent record
 - Summary
 - Contact
 - Personal Info.
 - Relationships
 - Memberships
 - Volunteers

CONSTITUENT TABS

continued next slide

Tab	Second-Tier Tabs	Description
Summary	<ul style="list-style-type: none"> N/A 	Displays an overview of an individual constituent, including revenue summary, recent and upcoming communications, and activities.
Contact	<ul style="list-style-type: none"> N/A 	View the constituent's contact information, including addresses, phone numbers, email addresses, and social media accounts.
Personal Info	<ul style="list-style-type: none"> Personal, Constituencies 	View personal information about a constituent, such as the nickname, maiden name, birth date, website, interests, and constituencies.
Relationships	<ul style="list-style-type: none"> Relationships, Group Members, Relationship Tree, Extended Relationships, Committees 	View the familial, social, or professional associations of constituents, including information about the groups or household of which the constituent is a member.
Revenue	<ul style="list-style-type: none"> Recognition 	View a snapshot of a constituent's revenue information. Note: The tab contains multiple second-tier tabs to help you navigate through the information.
Memberships	<ul style="list-style-type: none"> N/A 	View and manage information related to the constituent membership programs.
Volunteers	<ul style="list-style-type: none"> General, Availability, Timesheets, Awards, Documentation 	View and manage volunteer information for the constituent. The tab contains multiple second-tier tabs to help you navigate through the information.

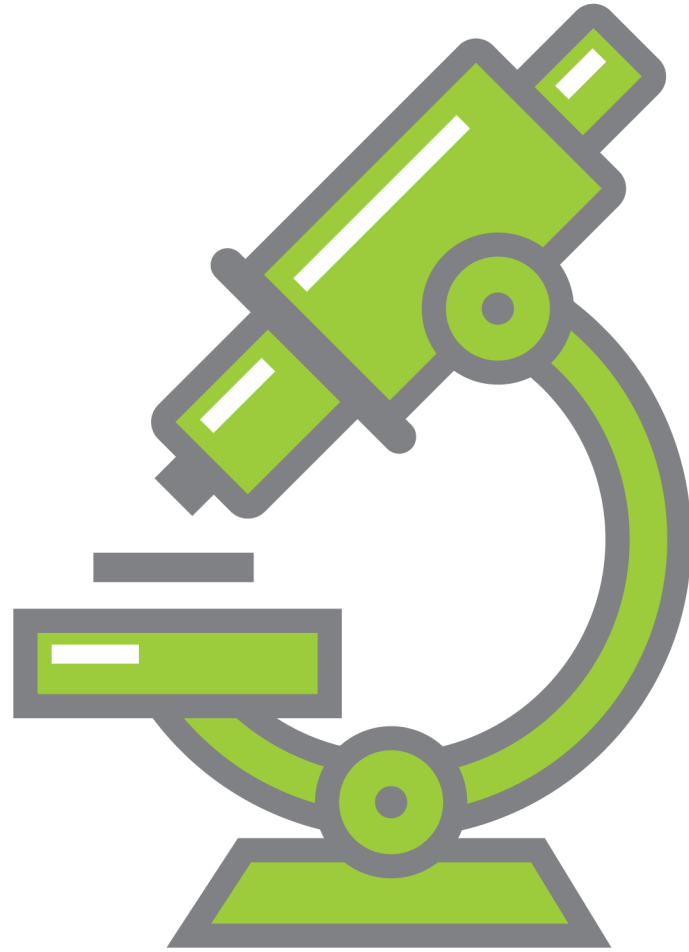
CONSTITUENT TABS *continued next slide*

Tab	Second-Tier Tabs	Description
Prospect	<ul style="list-style-type: none"> Prospect Summary, Prospect Manager History 	View major giving prospect information for the constituent. The tab contains multiple second-tier tabs to help you navigate through the information.
Education	<ul style="list-style-type: none"> N/A 	View information related to any higher learning institutions a constituent attends or attended.
Documentation & Interactions	<ul style="list-style-type: none"> Documentation Summary, Constituent Documentation, Interactions, Surveys 	View documentations, interactions, and surveys for the constituent.
Communications	<ul style="list-style-type: none"> Communications, Appeals, Preferences, Newsletters 	View a snapshot of our organization's communication with the constituent. View constituent communication preferences.
Attributes	<ul style="list-style-type: none"> N/A 	View constituent attributes. Constituent attributes store specialized information about a constituent when a field or tab is not available for that information.
Events	<ul style="list-style-type: none"> N/A 	View the constituent event registration.
Smart Fields	<ul style="list-style-type: none"> N/A 	View smart fields that provide quick access to specific, calculated information.

WHAT ROLE DO ORGANIZATIONS PLAY?



LEARN LAB



- Let's search for an **Organization**, and examine the record
- *Kiewit
- Primary organization



ORGANIZATIONAL CONSTITUENT RECORD

QUICK PEEK at the tabs on an organization record

- Contact
- Organization Info
- Corporate Info
- Relationships
- Revenue
- Documentation & Interactions
- Communications
- Events

Tab	Second-Tier Tabs	Description
Organization information	<ul style="list-style-type: none">• Organization, Constituencies	Manage the organization details, demographics, matching gift conditions, alternate lookup IDs, and interests. Manage aliases, acronyms, alternate names, and constituencies.
Corporate Info	<ul style="list-style-type: none">• N/A	View information about the revenue, employees, or prospects plans of organizations in the Corporate structure hierarchy.
Organization History	<ul style="list-style-type: none">• N/A	View and manage parent and corporate merger history information.

COMMITTEE RECORDS



THINK ABOUT IT

- What role do Committees play in our organization?



QUICK PEEK at the tabs on a committee record:
Committee tab, **Members** tab



SCAVENGER HUNT



- Search for and open a Committee record

Try It: ***Advisory**

Or: **NU Board of Regents**

BREAK



UNITS



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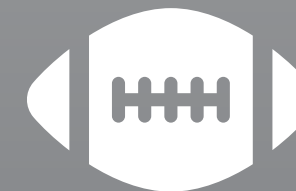


Online
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Steps



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Support

THINK ABOUT IT



INTERACTIONS

Interactions are a permanent record of activity with a constituent. *Ali* users will utilize this system as a primary source of information in their respective responsibilities. Therefore, it is critical to ensure that this system of record contains timely, complete and accurate information. If contact or prospect information is not found in this system, it is presumed that no significant activity has taken place with that constituent. *Ali* users should use discretion in determining what qualifies as pertinent information to include.

CATEGORY	SUBCATEGORY	CONTACT METHOD <i>Selection(s)</i>	Dept Contact
Contact	Personally Scheduled Meeting	Meeting	Prospect Information Management, MarComm (Correspondence)
	Direct Communication	Phone, Mail, Electronic	
	Face-to-Face	Meeting	
	Indirect Communication	Meeting, Phone, Mail, Electronic	
	Invitation	Mail	
	Estate Administration	Meeting, Phone, Mail, Electronic	Legal
	Fund Report	Mail	Donor Relations and Stewardship
	Strategy Session	Meeting	Prospect Information Management
	Scholarship Recipient Information	Mail	Donor Relations and Stewardship
	Scholarship Recipient Thank You Letter	Mail	
Records Maintenance	Biographical Update	Administrative	Systems Information
	Opt-In/Opt-Out Request		
	Solicit Code/Opt-Out Expiration		
	Add Assignment		Prospect Information Management
	Change Assignment		
	Remove Assignment		
	Prospect Lead		
Acknowledgements	Campus	Mail	Donor Relations and Stewardship
	Presidential		
	Tribute		
NAA	Attended	Meeting	NAA
	Direct Communication	Phone, Mail, Electronic	
	Face to Face	Meeting	
	Indirect Communication	Meeting, Phone, Mail, Electronic	
UNOAA	Attempted Contact	Phone	UNOAA
	Direct Communication	Phone, Mail, Electronic	
	Indirect Communication	Meeting, Phone, Mail, Electronic	
	Thank You	Meeting, Phone, Mail, Electronic	
UNMCAA	Direct Communication	Phone, Mail, Electronic	UNMCAA
	Face to Face	Meeting	
	Indirect Communication	Meeting, Phone, Mail, Electronic	

INTERACTIONS

Best Practices

At minimum, all interactions should:

- enter the interaction within 10 business days
- include all pertinent information that helps to advance the relationship with the prospect.
- use preferred names and titles, and refrain from the use of acronyms and nicknames (even if they may be well-known at the time of entry).
- not include negative commentary especially regarding sensitive personal information (e.g. messy divorce situations, opinions of personal appearance, etc.). See the Foundation's **Information Disclosure Policy** available [online](#) for guidance. If it is not relevant to the prospect's relationship with the university and foundation and/or would embarrass the constituent, do NOT put it in the contact report. If information perceived as embarrassing is nevertheless important, relay it to the appropriate staff verbally.
- if you met with representatives of an organization, include the name and title of the person(s) with whom you met.

INTERACTIONS

Broad Framework for Interactions

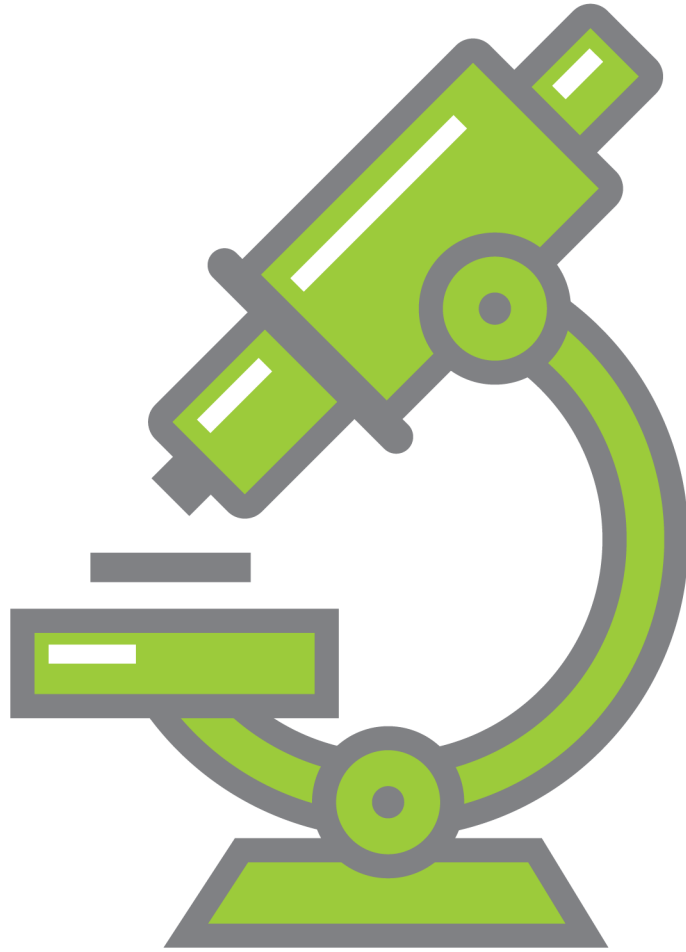
University/NAA/UMCAA Users

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



LEARN LAB

LET'S ENTER AN INTERACTION



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ALI CRM

Single Source Of Truth

NU Foundation • Ali

Web Content Display

LOGIN

CURRENT USER: [LOGIN](#)

PASSWORD: [RESET](#)

FORMS, REFERENCES AND TRAINING MATERIALS

Ali CRM

▶ [INTRODUCTION VIDEO](#)

∞ [TRAINING MATERIALS](#)

NUFFO

∞ [TRAINING MATERIALS](#)

[NUFFO ESSENTIALS](#)

[REQUEST OR MODIFY ACCESS - FUND AUTHORITY FORM](#)

[PAYMENT REQUEST FORM](#)

[TRANSFER REQUEST FORM](#)

[REINVESTMENT REQUEST FORM](#)

[FAQS](#)

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ONLINE RESOURCES

Constituencies Guide

Guide for:

CONSTITUENCIES IN ALI CRM

Primary Constituencies and Definitions
There should only be one primary constituent code assigned to each constituent record.

Display	Definition
Alumnus	A constituent who has completed at least one degree (associate, undergraduate or graduate) from a campus in the University of Nebraska system – Lincoln, Medical Center, Omaha, Kearney or Curtis. This code is applied automatically based on a “Completed” education status with a Nebraska system school.
Committee	Committee records are a specialized group in Ali. Committee groups have all of the group functionality, but can optionally also be event coordinators and solicitors.
Corporation	A business, partnership or cooperative that has been organized for profit-making purposes, including those owned by individuals and families and other closely held companies.
Foundation-Corporate	A foundation that is directly associated with a corporation. This foundation may make gifts and grants independently or match philanthropic giving by their employees.
Foundation-Family	A family foundation is one in which the donor or the donor's relatives play a significant role in governing and/or managing the foundation. It is feasible that a foundation would begin as a family foundation but evolve into a private foundation after the death of the donor and/or donor's relatives.
Foundation-Private	A nonprofit organization which is usually created via a single primary donation from an individual or a business and whose funds and programs are managed by its own trustees or directors.
Fundraising Consortia	Entities that have been formed by a group of cooperating institutions or organizations to facilitate their fundraising activities.
Government	Government entities such as police departments, city or state agencies, etc.

ONLINE RESOURCES

Naming Conventions

Organizations

Organization	Abbreviation
University of Nebraska Foundation	UNF
Nebraska Alumni Association	NAA
University of Nebraska Foundation Charitable Gift Fund	UNFCGF
University of Nebraska Medical Center Alumni Association	UNMCAA
University of Nebraska at Omaha Alumni Association	UNOAA
University of Nebraska at Kearney Alumni Association	UNKAA
University of Nebraska Investments	UNFI
The Nebraska Medical Center	TNMC



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8.5x14 Legal


Glossary for University Partners

	Term	Definition	Manual, Guide, or other Source
A	Acknowledgement	An acknowledgement is a "thank you" for revenue that was given by a donor. There may be multiple acknowledgements for an individual transaction. See also Campus Based Acknowledgement Letters .	CRM Online Glossary
	Acquisition Lists	Acquisition lists are files with names and addresses of potential donors that you rent or purchase from vendors. These files may also contain other information that is not essential for sending a marketing effort but may be useful when reporting on the success or failure of a particular list. For this reason, nonessential fields (fields other than name and address) are considered part of each list and are not discarded.	
	Additional Fundraiser	Person(s) acting on behalf of the University or Foundation with the interaction's Owner who are involved in the interaction. Additional fundraiser(s) are recorded on the Attributes tab of a general interaction .	
	Advancement	Advancement practices include fundraising, alumni relations, interactions and communications with alumni, donors and friends of the University of Nebraska.	
	Ad-hoc Query	An ad-hoc query is a tool that enables you to select, group, and list records that meet a set of conditions you define. It provides access to all of your data and helps you answer specific organizational questions. Compared to/see also Query; Smart Query .	CRM Online Glossary
	Ali CRM	Constituent Relationship Management (CRM) database system developed by Blackbaud. Aletheia is a constituent records management system that will be used to store and track information related to advancement of the University of Nebraska through engagement with alumni, donors and friends of the University. The system (and all data stored therein) is owned by the University of Nebraska Foundation. The Advancement CRM has been nicknamed "Ali," short for Aletheia (pronounced "al-uh-thee-uh".) In the Greek language, Aletheia is variously translated as unclosedness or unconcealedness. In Greek mythology, Aletheia is considered the Goddess of Truth. Ali CRM is to become the once source of truth for University of Nebraska advancement information.	Core Principles Guide - revision by JR 10.5
	Ali Access Web Site	The one-stop shop for all information related to Ali. This site contains information for current and prospective Ali CRM and NUFFO users; a link to log into Ali CRM; forms; training & resources; help; and much more. www.nufoundation.org/ali	

Glossary

ONLINE RESOURCES

Version 1.0 04/12/2018


ALETHEIA_{CRM}
Single Source Of Truth
Event Essentials

Where to Look:

Stages of Event Attendance:

Invited


↓

Registered
= RSVP received

↓

Attended

ON A *CONSTITUENT* RECORD




Was constituent invited?
 Communications tab
 Filter by Communication:
 Event Invitations

Did constituent RSVP or attend a specific event?
 Must refer to *event record's*
 Registrations tab


So what's on the Events tab of a constituent record?
 Only shows events for which an RSVP was received

What is the best place to look for a constituent's most recent event-related activity?
 Summary tab of the constituent record

ON AN *EVENT* RECORD



Access via the **Events** functional area at top;
 double-click on colored event bar on calendar to open event record or enter keyword and click magnifying glass to search (do not use *).

Enter the name of an event BECI 

Where can I find the invitation?
 Documentation tab
 Invitation is attached in this location so as to be visible to *both* UNF and university partners

I want to check RSVP for a certain constituent.
 Registrations tab
 Type [LastName] or [*FirstName] into **Registrant** field, then click **Apply** to filter

Who is on the invitee list?
 Registrations tab

Who has RSVPd, and what is their response?
 Registrations tab
 Click **Status** column heading to sort by response type

How many people are coming?
 Refer to **Will Attend** quantity listed in **Event capacity** section (upper right corner)

Who is planning or championing this event?
 Tasks/Coordinators tab

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

Supplemental Reference Guide for:

CONSTITUENT GROUPS: WHEN AND HOW TO TRACK CONSTITUENT GROUPS

Summary

As you continue to expand your work in Ali CRM, you may determine the need to collectively view or contact groups of individual constituents. If these constituent groups are not in Ali CRM and you would like them to be added, please contact Jessie Rader, Director of Advancement Records and Research. Jessie will help guide you through the information needed to process your request. This document will give you a general overview of items to consider when requesting a constituent group and the best methods for tracking and maintaining them.

When to track constituent groups

As you consider constituent groups, please keep in mind that Ali CRM is an Advancement CRM. It is not a student or staff (human resources) CRM database. Ali is designed to warehouse information about alumni, donors and friends of the university. Students who are scholarship recipients are included in Ali CRM, and some staff and faculty are included based upon their advancement roles. However, Ali CRM is not intended to be used for student or staff affairs and management. When students graduate, they are added to Ali CRM as part of a routine process with all four campuses.







Please consider the following questions when thinking through your constituent groups. When answering these questions, please elaborate further than Yes/No when able.

1. How do you plan to use this group?
2. Do you currently track this group? What data do you have?
3. Is this an organized group (i.e. advisory board, chapter)?
 - a. If yes, is this a subset of another organization or group?
 - i. Does this group make donations?
 - ii. Do the members of the group serve terms? If yes, how long?
 - iii. What roles can the members serve? (i.e. member, chair, president)
 - iv. Do they host events?
 - b. If no, is it a special list or grouping used for communication purposes?
 - c. If no, is this a list of volunteers (i.e. calls senator, writes postcards)?
 - i. (University of Nebraska, Foundation, Alumni Association) or external provided?

Constituent Groups:
When and How to
Track Constituent
Groups

APPENDIX FLY-OVER:

ONLINE FUNDAMENTALS MANUAL

- **Communications: Write A Letter** 
- Event Search 
- Membership Programs 
- Prospect Management: Interactions 
- Recognition Programs: Giving Societies 
- Smart Queries - Reporting 



NEXT STEPS

1. Find your constituents.

2. Find and work with your groups.

- Committees, volunteers, advisory boards, alumni groups, etc.
- Identify any groups or members that are missing.
- Send updates/edits to: biographicalrecords@nufoundation.org
- Work with your alumni association to create lists and get communications on the shared calendar and uploaded to constituent records.

3. Review online resources.

NEXT STEPS

4. Support future Ali improvements.

Join the Ali user feedback group or send ideas to servicedesk@nufoundation.org.

5. Passwords expire every 90 days.

6. Online anonymous survey.

7. Questions? servicedesk@nufoundation.org

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KEY POINTS



- **Ali CRM** is easily navigated
- You can set shortcuts to easily access tasks and records relevant to your daily work
- There are four record types in the system, which are connected through relationships

FOUNDATION CONTACTS



- UNF Service Desk



- Please submit all *Ali* inquiries and issues via email ticket



servicedesk@nufoundation.org

- Constituent Record Updates



- Data continues to be owned and managed by the foundation




biographicalrecords@nufoundation.org



QUESTIONS?

Before You Walk Away – Remember to **ALWAYS** Lock your Machine



- Log out
- Change Password functionality
- Lock Screen at your desk:
 -  *Windows key* + **L**
 - **Chromebook: CTRL+SHIFT+L**



CONGRATULATIONS!!!

Welcome to  ALI CRM

THANK YOU



Angie Taylor, Technical Trainer

angie.taylor@nufoundation.org

402.458.1243