

WELCOME!

ORACLE|ALETHEIA CRM
Single Source Of Truth

Events Management 210

Training for new university events
planning professions

January 2019

UNIVERSITY of NEBRASKA FOUNDATION

HOUSEKEEPING

- Trainer Introductions: Annie Bougger, Angie Taylor
- Events Management Manual
- Schedule:
 - Break (5- *or* 10-minute) approx. 10:45 a.m. –OR– 2:30 p.m.
 - Conclusion: Noon –OR– 4:00 p.m.
- Restrooms
- Please sign in
- Place phones face down and refrain from use during training.



EXPECTATIONS

- **Flexibility** and **Patience** are key
 - New mansion, new roles: who does what?
- Brisk pace
- Ask questions 😊
- Manuals



Tips/Notes

UNITS



Introduction



Events
Functional
Area
+
Search



Creating a new
Event



Process
Event
Invitations



Manage
Event
Registrations
and Seating



Event
Documentation
+
Reporting
+
Summary

EVENTS MANAGEMENT

Ali CRM Events Management helps organize event planning and plays a key role in management and implementation of events as directed by the foundation, university, campus, college or individual levels.

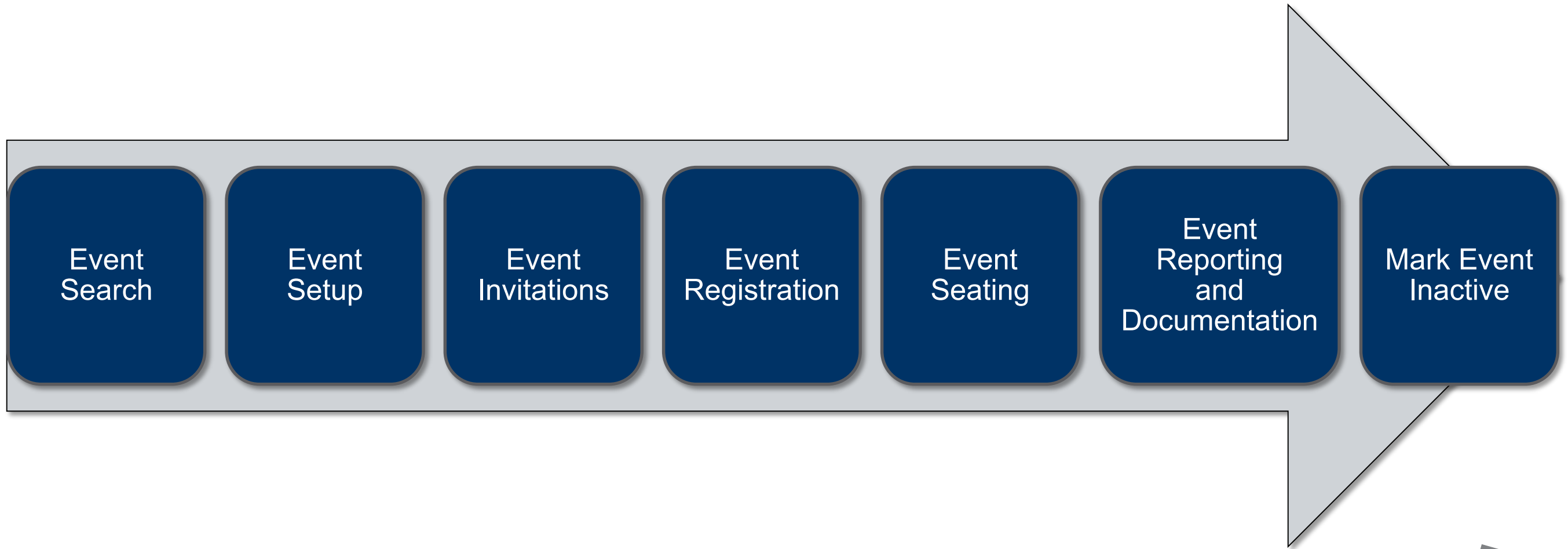
All events recorded in *Ali CRM* should serve the role of advancing the mission of the University of Nebraska system through strategic planning of celebrating a gift, cultivating alumni for future giving, honoring a special guest, or stewarding past donors.



EVENTS MANAGEMENT TOOLS

- Online Event Registration Tools
 - Attend.com
 - Blackbaud Internet Services (BBIS)
- Constituent Relationship Management (CRM)

EVENT PROCESS



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EVENTS FUNCTIONAL AREA

Events

+ Add new

Event calendar

Jump to date:

Group by:

Calendar List Export

May 2017
Day Week Month Year

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	01	02	03	04	05	06
16 NAA Travel Adventure Glacier Splendors, Alaska						
17 NAA Olympic Sports Vouchers						
16 NAA Travel Adventure European Empires, Artistry						
17 NAA Travel Adventure Southern Grandeur						
6:00 PM 17 NUF UNMC			17 UNOAA Awards 4:30 PM 17 NUF BECI	17 UNKAA Awards 17 NAA Awards		
07	08	09	10	11	12	13
16 NAA Travel Adventure Glacier Splendors, Alaska						
17 NAA Olympic Sports Vouchers						
16 NAA Travel Adventure European Empires, Artistry						
17 NAA Travel Adventure Southern Grandeur						
			17 NAA YAA Baseball		4:00 PM 17 NUF UNO 4:00 PM 17 NUF UNO	
14	15	16	17	18	19	20
16 NAA Travel Adventure Glacier Splendors, Alaska						
17 NAA Olympic Sports Vouchers						
16 NAA Travel Adventure European Empires, Artistry						
17 NAA Travel Adventure Salute to Spain						
17 NAA Travel Adventure Essential Europe						

Events

Sites:

Locations:

Categories:

Include inactive

Only show my events

Show tasks

Include completed tasks

Apply filters
 Reset filters



EVENT SEARCH

Events

Enter the name of an event + Add new

Event calendar

Jump to date: 5/2/2017

Group by: Category

Sites: All sites

Locations: All locations

Categories: All categories

Include inactive
 Only show my events
 Show tasks
 Include completed tasks

Find an event

Name: 17 unf Location: Category: Search Clear

Date: All dates From: mm/dd/yyyy To: mm/dd/yyyy

Sites: All sites

Results (7 records found)

Name	Lookup ID	Start date	End date	Contact	Site	Location	Category
17 UNF Potluck	8-10002384	4/7/2017	4/7/2017		University of Nebraska Foundation	UNL East Campus Un...	UNF
17 UNF Spring Game	8-10002388	4/14/2017	4/14/2017		University of Nebraska Foundation		UNF
17 UNF Spring Game Tailgate	8-10002391	4/14/2017	4/14/2017		University of Nebraska Foundation		UNF
17 UNF UNO CBA Scholarship Dinner	17UNFCBASD	4/17/2017	4/17/2017		University of Nebraska Foundation; University of Ne...	UNO Mammel Hall	UNF
17 UNF WIN CA Linder	17UNFWINCALinder	2/15/2017	2/15/2017				UNF
17 UNF WIN Scottsbluff BECI	17UNFWINScottsbluf...	3/24/2017	3/24/2017				UNF
17 UNF Winter Events Campus Invite List	17UNFWECIL	1/1/1901	1/1/1901				UNF

Help Select Cancel



EVENT RECORD: ANATOMY

Application features

Home | Constituents | Marketing and Communications | Revenue | Events | Prospects | Volunteers | Fundraising | Analysis | Administration | PaperSave | NUFFO

Tasks

- Edit event
- Edit lookup ID
- Convert to multi-level event
- Configure seating layout
- Assign seats
- View seating summary
- Update event attendance
- Do not show event on event calendar
- Mark active
- Delete event
- Configure email alerts

15 NUF UNMC Healing Arts Soiree

Start date: 8/3/2015 - 5:00 PM Status: Inactive
 End date: 8/3/2015 - 8:00 PM Lookup ID: 15NUFUNMCHealingArts
 Site: Location: Room/Unit: Contact: Coordinator: Category: UNF

Event expenses

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

Event capacity

Event capacity: 0
 Will attend: 33
 Will not attend: 0
 Attended: 30
 0% of capacity

[Registrations](#) |
 [Invitations](#) |
 [Documentation](#) |
 [Attributes](#) |
 [Tasks/Coordinators](#) |
 [Speakers](#) |
 [Expenses](#) |
 [Options](#) |
 [Appeals](#) |
 [Job Occurrences](#) |
 [Lodging Options](#) |
 [Campaigns](#) |
 [Registrant Details](#)

Registrations (33) + Add 📄 More

Type: Registrant:
 Status: Attended: 🔍 Apply 🔄 Reset

<input type="checkbox"/>	Registrant	Type	Status	Attended	Online registrant
<input type="checkbox"/>	Barry, Tim	Preregistration	Registered	Yes	
<input type="checkbox"/>	Boyer, Michael C.	Preregistration	Registered	Yes	
<input type="checkbox"/>	Boyer, Holly H.	Preregistration	Registered	Yes	
<input type="checkbox"/>	Carlson, Mark A.	Preregistration	Registered	Yes	
<input type="checkbox"/>	Gloden Carlson, Sarah A.	Preregistration	Registered	Yes	
<input type="checkbox"/>	Cowan, Kenneth H.	Preregistration	Registered	Yes	
<input type="checkbox"/>	Freifeld, Alison G.	Preregistration	Registered	Yes	

More information

- View event calendar

Reports

- Event comparison
- Event profile
- Event revenue

EVENTS OVERVIEW

Events

Enter the name of an event

Event calendar

Fundraising events

- Event search
- Events overview
- Locations

Events Overview

Tasks | **Events**

(110)

Events: Site: Only show my events

Location: Category: Include inactive

Name	Start date	Start time	End date	End time	No. of registra...	Budgeted amo...	Actual amo...	Main event
16 NAA Travel Adventure European Empires, Artistry	10/14/2016		10/22/2106		4			
16 NAA Travel Adventure Glacier Splendors, Alaska	6/19/2016		6/26/2106		0			
18 NAA Travel Adventure Western Europe Escapade	5/27/2018		6/8/2018		2			
17 NAA TIX FB 1874 & Hail Varsity & Staff Season	9/2/2017		12/31/2017		0			
17 NAA Travel Adventure: Holiday Markets	12/11/2017		12/22/2017		0			
17 NAA Travel Adventure South African Explorer	12/5/2017		12/21/2017		0			
17 NAA Nebraska Champions Club Pedestrian Passes	9/2/2017		12/1/2017		2			
17 NAA Travel Adventure Medieval Masterpiece	11/5/2017		11/14/2017		0			
17 NAA Travel Athletic Minnesota Trip	11/10/2017		11/12/2017		4			
17 NUF UNL CEHS Scholarship Donor Luncheon	10/13/2017	12:00 PM	10/13/2017	1:30 PM	0			
17 NAA Travel Adventure Captials & Coastlines	9/30/2017		10/10/2017		3			
17 NUF UNL CBA Building Opening	10/6/2017		10/6/2017		0	\$60,000.00	\$0.00	
17 NAA TIX FB HOME NORTHERN ILLINOIS FMO	9/16/2017		9/16/2017		0			
17 NAA TIX FB HOME ARKANSAS ST FMO	9/2/2017		9/2/2017		0			
17 NAA Travel Adventure Northern Europe	8/12/2017		8/23/2017		3			

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CREATE A NEW EVENT

- Add an event 
- Event registration setup 
 - Event registration package 
 - Registration preferences 
- Event coordinators 
- Event details
 - Tasks, Lodging locations, Event speakers 



CREATE A NEW EVENT *continued*

- Add/Track event budget and expenses 
- Set up multi-level events 
 - Event Summary record 

Create Your Own Event



- Test it out – set up your own event!
 - See the handout for more details about your test event



EVENTS IN ALI

- Who can create events in Ali?
 - University and Foundation users
- T/F: University and Foundation users can store electronic versions of invitations, contracts, receipts, and expenses in Ali CRM.
 - True.



TAKE A **BREAK**



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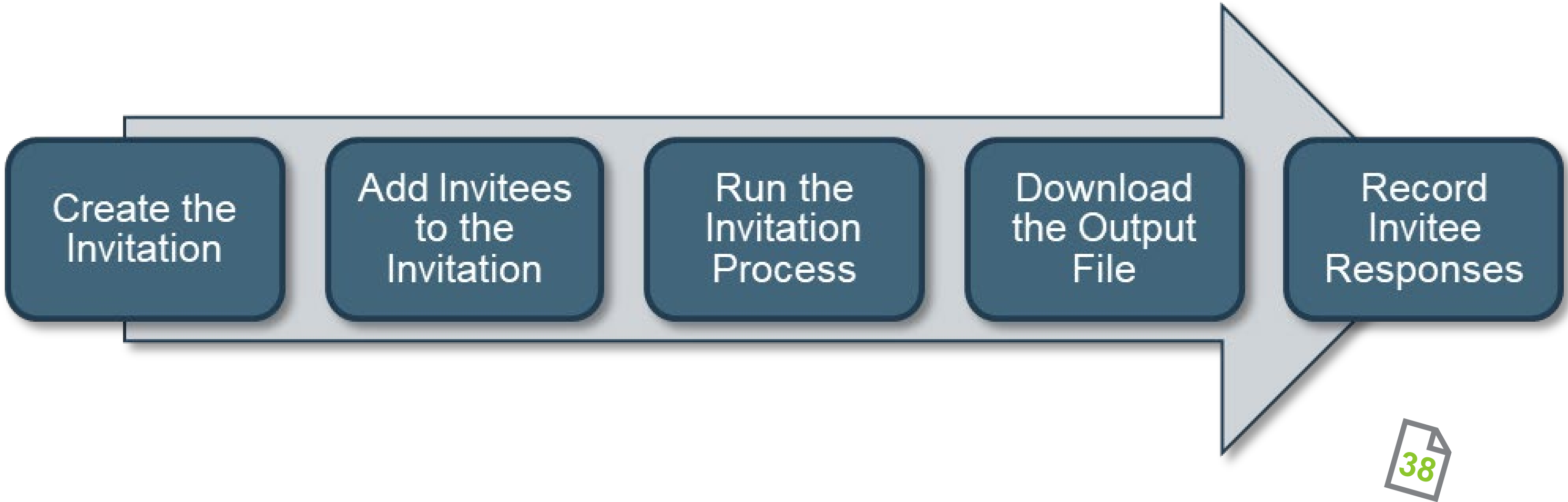


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EVENT INVITATION PROCESS



EVENT INVITATION PROCESS

- Create the invitation  38
- Add/access invitee list  43
- Run the invitation process  46
 - Writes the **Event** record to each invitee's constituent record
- Download output files  49


EVENT ESSENTIALS GUIDE

- Determine whether a constituent was invited and/or responded to an event invitation



Version 1.0 04/12/2018

Event Essentials



 Single Source Of Truth

Stages of Event Attendance:

Invited

↓

Registered = RSVP received

↓

Attended

Where to Look:

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:

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


Who attended?
Registrations tab, Attended column (input after the event)

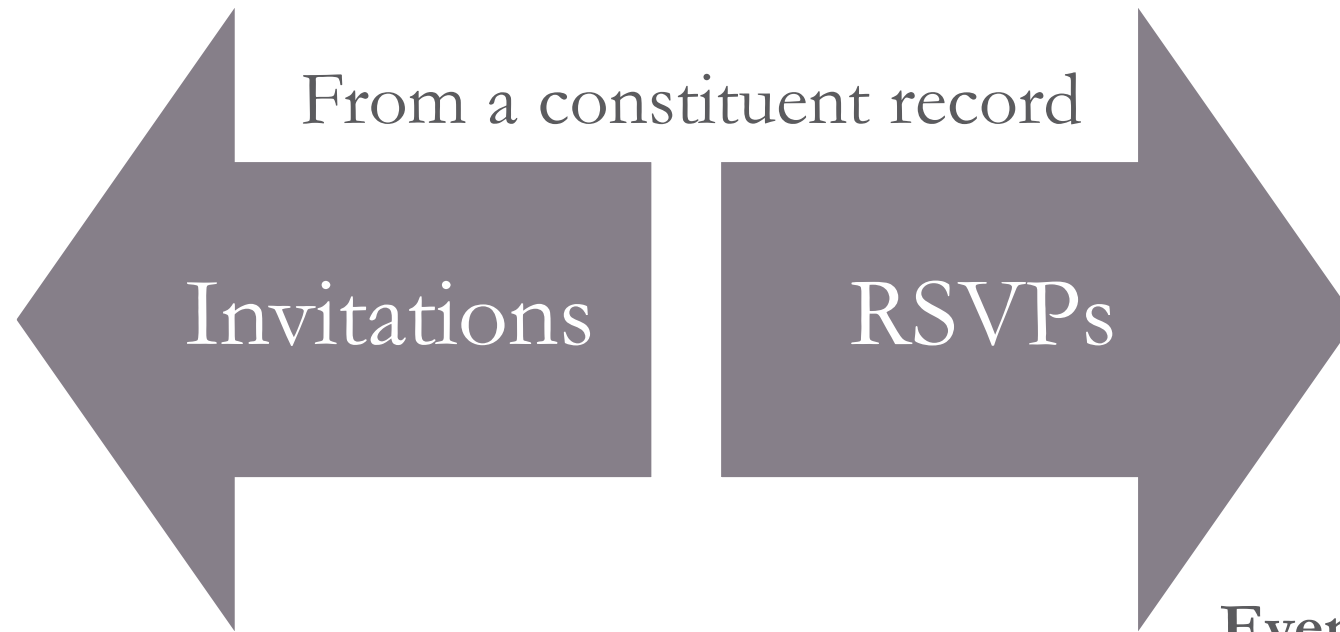
If Status displays:	The response indicates:
Registered	The individual WILL ATTEND.
Declined Canceled Will Not Attend	The individual WILL NOT ATTEND.
No Reply	Individual has NOT RESPONDED.

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Confidential and Proprietary. v1.0 02/26/2018

EVENT INVITATION PROCESS *continued*

- Determine whether a constituent was invited and/or responded to an event invitation 



Communications tab
Communication type: **Event Invitations**
Apply Filter

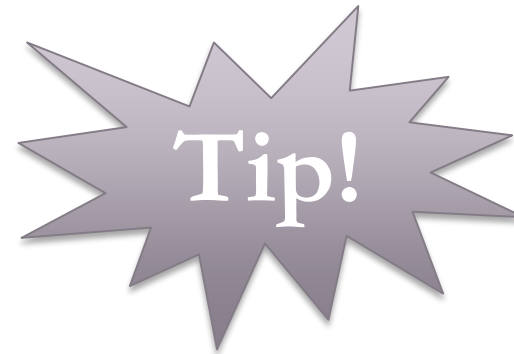
Events tab
RSVPs *and*
Historical invitations (converted)

EVENT INVITATION PROCESS *continued*

- Try it out –
Search for the constituent **Ruth Scott**
 - She lives in Omaha, Nebraska and is married to J. William Scott

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

Summary	Contact	Personal Info	Relationships	Revenue	Me
Revenue summary		View all revenue			
Total revenue:				\$188.00	
Total household revenue:				\$228.00	
Membership revenue:				\$750.00	
Event revenue:				\$0.00	
Recent and upcoming activities					
6/14/2017	Event registration	17 UNF UNMC FPBCC Search Tower Lighting			
5/22/2017	Event registration	17 NUF UNMC FPBCC Aresty Celebration			
5/12/2017	Event registration	17 NUF UNO CBA C. Glenn Lewis Statue & Dinner			
5/12/2017	Event registration	17 NUF UNO CBA Lewis Statue Unveiling & Dinner			
4/30/2017	Event registration	17 NUF UNMC Anne-Sophie Mutter Dinner & Concert			
4/27/2017	Event registration	17 NUF UNO CFAM Marion Marsh Brown Lecture Series			
4/26/2017	Event registration	17 NUF UNO NE Environmental Stewardship Kickoff			
4/14/2017	Event registration	17 NUF UNO CBA Investment Science Lab Dedication			



Summary tab on a constituent record displays:
Most recent 10 events
– *includes* invitations and RSVPs!

To determine response, must open **Event** record and refer to the **Registrations** tab.

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EVENT REGISTRATIONS

- RSVP Management 
- Navigating the **Registrations** tab 
- Add registrants and guests for a single event 
 - Add an invited registrant 
 - Add a new registrant manually 
 - Add a registrant without a constituent record 
 - Add unnamed guest attributes 

EVENT REGISTRATIONS *continued*





- The **Registrant** record 
- Add registration restrictions 
 - Event restrictions vs default restrictions for the constituent 
- Mark constituents as declined 
- Tracking event attendance 
 - Tracking student attendance 

Enter Sample Registrations



- Try it out!
 - Register two individuals in your event as attending alone
 - Register two individuals and their spouse as attending
 - Pick two people to decline
 - Register one individual as attending and bringing an “unnamed guest”

EVENT SEATING

- Configure seating layouts 
- Assign seats
 - Assign a registrant to a seat 
 - Add a seating group 
 - Assign groups to seats 

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EVENT DOCUMENTATION



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

EVENT REPORTING & SMART QUERIES

1. Event Registration & Nametag List 
2. Event Profile Report 
3. Event Summary Report 
4. Event Seating Summary Report 
5. Event Comparison Report 
6. Event Revenue Report 
7. Smart Queries

FINAL STEP

- Mark the event inactive



QUESTIONS?

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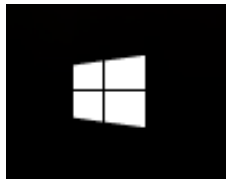
Angie Taylor

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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!!!

THANK YOU

 | **ALI** CRM
Single Source Of Truth