At-A-Glance: Events Maintenance & Event Loader

Step 1: Request Event Code

Email uris-data@case.edu with the name and date (month/day/year) of the event in the request; multiple event codes may be requested at one time. The Activity/Event code information will be e-mailed to the requestor within 24 hours after Advancement Services receives the request. The requesting department should keep a list of their requested event names & codes for future reference.

Step 2: Create Clipboard Of Invited Guests

Create and save a clipboard of all the entities you plan on inviting to your event. If you are inviting people that are not currently entities in the Advance database, you may have them added by emailing uris-data@case.edu with their information. Please reference the Clipboard manual for instructions on creating and saving a clipboard.

Step 3: Run Event Loader Report

Once your clipboard of invitees has been created and saved, you may run the Event Loader. Click on the Reports Icon on the main menu. Select the "Event Loader" report. In the prompt window of the report, you must enter your clipboard name (exactly as you saved it), the event code you received from Advancement Services, the start and stop date of the event, and the attendance (Invited).

Step 4: Updating Attendance After Event Ends

Create and save a clipboard of all those who actually attended the event. Create a brand new clipboard with the attendees only. Run the Event Loader report again, but this time use your attendees clipboard. Use the same event code and start/stop dates. Select "Update" and click on Run Report. The Event Loader will update the entities who attended as "Attended" and those who were no shows will simply stay "Invited".

Step 5: Reporting On Events

Event Attendees Canned Report will pull a list of those who were invited or attended an event. Using the information directly from the database helps to minimize the risk of error when printing nametags and putting together RSVP lists. Coding the attendees also assists in stewardship efforts following an event should a department wish to send follow-up correspondence to those people that attended.

The Activities module in Advance supports Development and University Relations by assisting users in creating events and tracking event participation. Event attendance is one of the variables that correlates with gift size, major gift donors, consistent annual donors, and can be predictive of future prospects and donors. The President's Office often relies heavily on the event information available in the Advance database when planning presidential trips and trying to arrange appointments with prospects. Any event sponsored by Case Western Reserve University needs to be entered into Advance.

Event RSVP's provide valuable biographical updates such as home or business addresses, phone numbers, email addresses, spousal information, etc. Advancement Services relies on the individual departments and/or schools to note any biographical changes when receiving RSVP's for an event, and requests that those changes be sent to uris-data@case.edu so the database can be updated accordingly.

It is up to the designated staff member in each department to keep track of and update in the system those entities that actually attended the event. If there are any walk-ins, they should be added to the database if they do not have their own unique entity ID. This can be done by emailing uris-data@case.edu with their name, address, affiliation and any other pertinent information. Once the entity has been created the requestor will be notified so that they may add the event code to the record.