Ellucian Documentation

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Notices and Privacy

Ellucian
2003 Edmund Halley Drive
Reston, VA 20191
United States of America

Contents

Ellucian CRM Advise

Ellucian CRM Advise is a higher education advising solution that is built on Microsoft Dynamics CRM. CRM Advise helps you proactively engage students with the right support, at the right time.

When you access the Ellucian Documentation Site, you can use the drop-down list in the Contents pane to select the type of content that you want to view. If you do not log in to the Ellucian Documentation Site, you can view information in the Use and Configure sections.

If you use your Customer Account credentials to log in to the Ellucian Documentation Site, in addition to the Use and Configure sections, you can view the Release Notes and Install sections.

See the Documentation Site Help under the site's main menu for information about additional site features.

Advisor functions

The Advisors area allows you to view current student success scores and details, identify students who are at risk, and take specific actions for students as needed. You can access this area of Advise if you are assigned either the "Advisor" or "Advisor All Students Access" security role.

Within the Advising area, you can view the Advising Dashboard, information about the student, and any related records, alerts, and tasks.

The Advising Dashboard

The Advising Dashboard contains a high-level look at the information that you need when advising students, such as a list of your assigned students, a chart that shows student risk levels, and alerts that are categorized by severity.

From the dashboard, you can do the following:

- View your assigned students.
- Search for specific students.
- View the success scores for your students.
- View the risk levels for your students, as determined by the success scores in relation to the defined scoring bands.
- Manage active alerts for your students, along with any associated activities.
- View your activities.
- Change the view for specific sets of students. For example, you can see your assigned at-risk students by selecting the "My At-Risk Students" view, or you can see students with alerts by selecting the "My Students With Open Alerts" view.
- View whether a student uploaded a file with an assistance request from the student experience site.

  Note: If the alert came from the student experience site and the student uploaded a file, an attachment icon appears. If someone removes the attachment, the icon remains.
- Drill into other records, such as a student or alert, to access additional details.

Note: Activities are a native CRM feature. For more information, see the Microsoft Dynamics 365 Help.

Advising appointments

From Advise, you can manage advising appointments that students create from the CRM Advise student experience site.

Change your profile picture

After an administrator uploads a profile picture, you can change it. This picture will appear to students on the CRM Advise student experience site.

Procedure

1. From the navigation bar on the right, click the profile picture box.
2. Browse for and select a picture located on your computer.
3. Click OK.

Change your time zone

If your time zone is different from the institution's, you can change it so that you are viewing the correct time in your calendar.

Procedure

1. From the navigation bar on the right, click the Settings icon.
2. Select Options.
3. In the Set the time zone you are in, select the applicable time zone.
4. Click OK.

Set your office location

You can set the physical or virtual location of your office.

About this task

Keep the following in mind when setting your office location:

- You should set up your locations before you set your office hours, because you must select a location when you are setting up an office schedule.
- If your institution does not use Advising Appointment Scheduling on the student experience site, you can still set your location, but students will not be able to see it, because locations are visible only when scheduling an appointment.

Procedure

1. Go to Advisors > My Locations.
2. Click New.
3. In the General section, enter the applicable information in all required fields and additional fields as needed.

Field	Description
Location Type	If you can meet at an actual office, select Physical Location. If you want to offer electronic meetings online, select Virtual Location.
Owner	If you are setting up a location for someone else, you can change the owner.

4. In the Location Details section, enter helpful directions, as needed. The student will see any details you enter.

   Note: You can include instructions for what the student should bring to an appointment. Or, if you create a physical location, but want to give the student the option to call you or meet in some other way, you can include instructions.

5. Click Save & Close.

Set your office hours

You can set your office hours so that students can see when you are available.

About this task

Keep the following in mind when setting up office hours.

- You should set up your locations before you set up your office hours, because you must select a location when you're setting up an office schedule.
- As long as your administrator has set up business closures, those days will not show as available.
- Students will be able to see your office hours on the student experience site even if your institution does not use Advising Appointment Scheduling.

Procedure

1. Go to Advisors > My Office Hours.
2. Click New.
3. In the General section, enter the application information in all required fields and additional fields as needed.

Field	Description
Availability	You can change your availability when necessary.
Notes	Any notes you enter will not appear to students.

4. Click Save & Close.

View your advising appointments

As an advisor, you can view your advising appointments that students have scheduled from the My Calendar feature.

About this task

Keep the following in mind.

- You will get an email for each booked appointment with an .ics attachment so you can import it into your primary calendar.
- Completed and canceled appointments are different colors.
- In the calendar, "Canceled" appears in the text of your canceled appointments. If a student schedules another appointment in the same time slot, the canceled appointment does not disappear. The new appointment appears above or below, and a conflict icon appears. As long as one appointment states "Reserved" and one appointment states "Canceled," there is not a conflict.
- The calendar shows other appointments in addition to advising appointments.

Procedure

1. Go to Advisors > My Calendar.
2. In the Calendar Views section on the right, select how you want the system to show you your calendar.
3. Review the appointments as needed.

Close an appointment

To show the outcome of an advising appointment, you must close it.

Procedure

1. Go to Advisors > My Calendar.
2. Select the appointment you want to close.
3. In the Appointment Notes field, enter information about the outcome of the appointment.
4. Click Close Advising Appointment.
5. In the Status field, click the applicable reason for closing the appointment. For tracking purposes, it is important that you distinguish between "Completed" and "No Show."
6. Click Close.

Cancel one or more appointments

You can cancel one or more appointments at the same time so that your availability is accurate in the CRM Advise student experience site.

About this task

Keep the following in mind.

- In the calendar, "Canceled" appears in the text of your canceled appointments. If a student schedules another appointment in the same time slot, the canceled appointment does not disappear. The new appointment appears above or below, and a conflict icon appears. As long as one appointment states "Reserved" and one appointment states "Canceled," there is not a conflict.
- You will receive an email for each canceled appointment with an .ics attachment so that you can remove it from you primary calendar.

Procedure

1. Go to Advisors > My Calendar.
2. Click Cancel Appointment.
3. Select the appointment(s) you want to cancel.
4. Click More Commands ..., and then click Cancel.
5. Select the applicable state and status.
6. Click Close.

Student scores and risk levels

A score indicates how a student is performing in relation to a Advise scoring plan.

Student scores consist of both success scores, which indicate a student's overall success at your institution, and course scores, which indicate a student's success in a specific course section. Scoring plans are configured in the Success Engine area.

Related concepts

- Set up and use scoring plans

View student scores

You can view current scores and score details for a student on the student profile.

Procedure

1. Go to Advisors > My Students.
2. Open the student whose scores you want to view.
3. On the student profile, you can do the following:
    - View the success score. Under the Summary tab, in the Current Success Score field, you can view the success score for the student.

- View the course scores. Under the Summary tab, in the Current and Future Enrolled Student Sections section, you can view the course scores for each of the student's course sections.

Related tasks

- View student score components

View student score components

You can view the components that make up a student's success or course score from the student profile.

Procedure

1. Go to Advisors > My Students.
2. Open the student whose scores you want to view.
3. On the student profile, you can do the following:
   - View the success score details. On the Summary tab, in the Current Success Score Record field, click the name of the current success score record to view the associated success score details.
   - View the course score details. Under the Summary tab, in the Current and Future Enrolled Student Sections section, click the name of the course score record to view the associated course score details.

   The following information is displayed for the score.

Section	Description
Score Details	The success or course score is calculated by taking the weighted average of the scoring rules values in the scoring plan.
Score Components	Lists the scoring rules that were used to generate the score. The student's score for the scoring rule is also displayed. You can click the scoring rule to access the risk conditions that were used to calculate the student's scoring rule score. Note: Performance scoring rules do not contain conditions. Instead, if a performance component is used in a course scoring plan, the gradebook value that is sent from the LMS application is used as the performance score. If a performance component is used in a success scoring plan,

Section	Description
	the gradebook value is weighted by section credits, and the average is used as the performance score.

4. Click the scoring rule to view the associated conditions.
   The following information is displayed for the score components.

Section	Description
Component Details	Contains important score component information, such as the numeric scoring rule score, scoring band color, parent score record, and associated scoring rule. The score is calculated by taking the weighted average of the risk conditions values in the scoring rule. The scoring band color indicates where the student's score falls in the scoring band ranges that are defined for the scoring plan.
Risk Conditions	Lists the conditions that were used in the scoring rule. Each condition that was not met is highlighted, and the associated scoring points are deducted from 100. The points that remain after deductions determine the value for the scoring rule.

Related tasks

- View student scores

View student risk levels

You can view risk levels for all of your assigned students.

Procedure

1. Go to Advisors > Dashboards.
2. In the Student Risk Level section, you can view how many students are in each risk level range based on the student's success score. The scoring band that is defined for the student's scoring plan determines which risk level range a student's success score falls into. The scoring band ranges are configured by your institution.
   In this chart, you can do the following:
   - View risk level by scoring plan. In the Scoring Plan field, select the scoring plan that you want to view. Only the risk levels for students with that scoring plan will be displayed.

- View students in each risk level range. Click View to view a list of students who are in that risk level range.

Student details

The student profile contains details about the student, such as academic standing, GPA, indicators, success score, scoring plan, alerts, engagement plans, and course sections.

From the student profile, you can view activities that are associated with the student, including communications such as emails or phone calls. You can also access additional details for certain types of records, such as a student's success score or alerts, and view any indicators that apply to the student. From the navigation bar, you can view records that are related to the student record but that are not displayed directly on the student profile, such as course sections or test scores. On the navigation bar, at any time, you can refresh the data on the student profile page.

View a student profile

You can view details about a student on the student profile.

About this task

The student profile includes data from integrated ERP systems and LMS applications.

Note: Users who are granted the applicable security role, can resynchronize student data from their dashboards.

Procedure

1. Go to Advisors > My Students.
2. In the list, open the student's record you want to view.
   The following information appears on the student profile.

Tab	Section	Description
Summary	Student Details	Contains important student information, such as the student's academic standing, primary academic level, class level, overall GPA, success score, scoring plan, and first term enrolled. You can also access related records to review additional details, for example, the student's success score record or scoring plan record.
	Indicators	Lists the indicators that apply to the student.

Tab	Section	Description
	Current and Future Enrolled Student Sections	Lists the course sections that the student is enrolled in for current and future terms. You can also change the view to see all enrolled course sections for the student.
	Majors	Lists the student's majors.
	Active Student Programs	Lists the student's active student programs. You can also change the view to see student programs that have ended for the student.
	Alerts	Lists the alerts for the student. You can access alert records or eligible alert rules as needed. Note: If the alert came from the student experience site and the student uploaded a file, an attachment icon appears. If someone removes the attachment, the icon remains.
	Success Score Performance	Displays a chart that shows the student's success score performance over a period of time.
	Posts/Activities/Notes	Enables you to view and enter posts, activities, and notes, which are native CRM features. These items can be viewed by anyone who has access to this student record. For more information, see the Microsoft Dynamics 365 Help.
	Private Notes	Displays private notes. These notes can be viewed only by users with privileges to view them. You can share private notes with other users or teams as needed.

Tab	Section	Description
Communications	Not applicable	Displays engagement plans and communications plans that the student is part of. For engagement plans, Advise displays any plan with activities associated with an engagement list that the student is part of, even if the activities have not yet been distributed. For communication plans, Advise displays any plans with distributed activities where the student is part of the communication member list.
Recruiter Communication	Not applicable	Appears only if your CRM Advise organization integrates with CRM Recruit. Displays all recruiters who have had the most contact with this student and their most recent activity.
Cases	Not applicable	Displays the cases opened for the student that are owned or shared by you or your team. You can access case records as needed.
Details	Personal	Contains additional student information, such as name, contact information, demographic information, and other indicators for students like restriction, first generation, or student athlete.
	Status Information	Contains current status details about the student, such as student type.
	Prior Academic History	Contains academic history about the student, such as total credits earned; international or transfer indicators; and additional GPAs.
	Financial Aid	Contains financial aid details. You will see these details only if you have been

Tab	Section	Description
		assigned access permissions to view financial aid fields.
	Full Address	Contains the student's complete address.
	Current Success Score Details	Contains the student's success score record.
	Academic Standing History	Contains the student's academic standing history.
	Student Advisors	Lists the student's assigned advisors.

Related concepts

- Private notes

Related tasks

- View alerts for a student
- View the eligible alert rules for a student
- View success score performance for a student
- View student scores
- View student score components
- Resynchronize individual student data

Resynchronize individual student data

With the applicable security role, you can resynchronize individual student data, including ERP data, success scores, alerts, indicators, or all of those, to make sure the record you are viewing is current.

Procedure

1. Access the applicable student profile.
2. Click Sync Data, and select the type of data you would like to resynchronize. The options are:
    - All
    - ERP Data
    - Success Scores
    - Alerts
    - Indicators

    You can also click the Refresh button in any of the corresponding sections.

View success score performance for a student

You can view the success score performance for a student on the student profile.

Procedure

1. Go to Advisors > My Students.
2. In the list, open the student for whom you want to view success score performance.
3. In the Success Score Performance section, two charts are displayed:
   a) In the first chart, you can view how the student's current success score fits into the scoring band for the student's scoring plan. The scoring band that is defined for the student's scoring plan determines which risk level range a student's success score falls into. The scoring band ranges are configured by your institution.
   b) In the second chart, you can view the student's success score over a period of time. In this chart, you can do the following:
      - View score performance by component. In the Score field, select the component that you want to view. You can view score performance by the success score or by the individual components that make up the success score. A point is displayed on the chart for each time the success score was generated, up to 24 points.
      - View score performance by term. In the Term field, select the term that you want to view. Only the success scores that were generated during the selected term are displayed.
      - View score for specific dates. Hover over the points on the chart to display the success score that was generated on that date. If more than 25 scores have been generated for that student during the selected term, the chart will be displayed in "line only" mode to show the scoring trend. All scores are used to generate the chart even though only a subset of scores are displayed on the chart.

View a student's academic level information

You can view details about a student's primary and secondary academic levels.

Procedure

1. Go to Advisors > My Students.
2. In the list, open the student whose record you want to view.
3. On the navigation bar, click the down arrow to the right of the user, and click Student Academic Levels.

Add or remove private notes in student profiles

You can add private notes to or remove private notes from the student profile.

About this task

Note: Private notes are only displayed to the owner of the private note and to other users with whom the private note has been shared.

Procedure

1. Go to Advisors > My Students.
2. In the list, open the student for whom you want to add or remove private notes.
3. In the Private Notes section, do the following:
   - To add a private note to the student profile, click Add Private Note record . In the provided fields, enter a title and description for the private note, and then click Save. Repeat this step as needed to add additional private notes for the student.
   - To remove a private note from the student profile, select the name of the private note, and click Delete .
4. Click Save.

Related tasks

- Share a private note with other users or teams

Alerts

An alert is a notification that a student needs attention.

An alert source can be automated, which means they are triggered when a student meets a condition. A condition is a known risk factor or positive change indicator that you can use individually or in combination as part of an alert rule.

Alerts with a faculty experience or student experience source are triggered when a faculty member or a student open them to indicate the student needs attention.

All alerts can contain associated activities that are generated when the alert is first opened. An activity is an action that you take on an alert or that you perform manually for a student, such as performing a task, making a phone call, or sending an email. Activities are usually pre-associated with the alert by the administrator, although you can also add additional activities to an alert as needed.

View your alerts

You can view alerts that are assigned to you on your alerts list.

Procedure

1. Go to Advisors > Alerts.
2. From the "My Open Alerts" view, you can view the alerts that are assigned to you, including the severity, date created, and the student it is regarding.
   You can also create new alerts and tasks by clicking Alert or Task from the command bar.

View my tasks

You can view tasks that are assigned to you on your tasks list.

Procedure

1. Go to Advisors > Tasks.
2. From the "My Tasks" view, you can view the tasks that are assigned to you, including the priority, the due date, the student it is regarding, and the status.
   You can also create new alerts and tasks by clicking Alert or Task from the command bar.

View alerts on the Advising Dashboard

You can view the open alerts that you own on the Advising Dashboard.

Procedure

1. Go to Advisors > Dashboards.
2. In the Alerts section, you can do the following:
   - View alerts by severity. Above the list of alerts, select the severity that you want to view. You can view alerts by High, Medium, Low, or All categories.
   - View the associated activities. If activities are associated with the alert, click Tasks, Emails, Phone Calls, Letters, Mobile Notifications, or Messages in the alert to expand the associated list of activities. Click the activity name to view the associated activity record.
   - Close the alert. In the alert, click Close. You can close an alert if the alert and any activities that are associated with the alert have been resolved. If you close an alert, it will no longer be displayed in the list.
   - Cancel the alert. In the alert, click Cancel. You can cancel an alert if the alert no longer applies.

Related tasks

- Close an activity for an alert
- Close an alert manually

View alerts for a student

You can view active alerts for a student on the student profile.

About this task

You can also view the active alerts from faculty experience and student experience for a student in the same section.

In the same section of the student profile, you can view the eligible alert rules that are currently in effect for a student.

Procedure

1. Go to Advisors > My Students.
2. Open the student for whom you want to view alerts.
3. In the Alerts section, you can do the following:
    - View alerts by severity. Above the list of alerts, select the severity that you want to view. You can view alerts by High, Medium, Low, or All categories.
    - View the associated activities. If activities are associated with the alert, click Tasks, Emails, Phone Calls, Letters, Mobile Notifications, or Messages in the alert to expand the associated list of activities. Click the activity name to view the associated activity record.
    - Close the alert. In the alert, click Close. You can close an alert if the alert and any activities that are associated with the alert have been resolved. If you close an alert, it will no longer be displayed in the list.
    - Cancel the alert. In the alert, click Cancel. You can cancel an alert if the alert no longer applies.

Related tasks

- Close an activity for an alert
- Close an alert manually
- View the eligible alert rules for a student

View the eligible alert rules for a student

You can view the alert rules that are currently in effect for a student on the student profile.

About this task

Eligible alert rules are those for which the student meets the engagement list criteria or has been added directly to the alert rule. If the student meets the conditions in an eligible alert rule, an alert is generated for that student.

Procedure

1. Go to Advisors > My Students.
2. Open the student for whom you want to view eligible alert rules.
3. In the Alerts section, click Eligible Rules.
4. In the Eligible Rules section, you can do the following:
    - View alert rules by severity. Above the list of alert rules, select the severity that you want to view. You can view alert rules by High, Medium, Low, or All categories.
    - View the alert rule record. Click the alert rule to view the associated alert rule record.

Related tasks

- View alerts for a student

View conditions associated with an alert

You can view conditions that are associated with an alert on the alert record.

Procedure

1. Go to Advisors > Alerts.
2. Open the alert for which you want to view conditions.
3. Under the Conditions tab, view the conditions that are associated with the alert.
   These conditions are defined when the alert rule is created.

Related tasks

- Add or remove conditions in automated alert rules

Close an activity for an alert

When you have completed an activity for an alert, you can close it by marking it complete.

About this task

Ellucian recommends that you mark your activities complete so that the system can automatically close alerts.

Note: If a student no longer meets the alert rule criteria and there are no open activities on the alert, the system automatically closes the alert.

Procedure

1. You can access activities in alerts from the following locations.

Location	Go to
Advising Dashboard	Advisors > Dashboards.
Student Profile	Advisors > My Students. Open the student whose record you want to view.

2. In the Alerts section, expand and open the activity that you want to close.
3. Click Mark Complete.
   If the activity should be canceled instead, you can click the appropriate Close button, and then select "Canceled" as the status.

Close an alert manually

You can close an alert manually by marking it complete.

About this task

You must manually close student experience and faculty experience alerts by marking them complete.

Note: Ellucian recommends that you allow the system to close automated alerts. Automated alerts are closed if the student no longer meets the alert conditions and all associated activities have been closed.

Note: If a student no longer meets the alert rule criteria and there are no open tasks on the alert, the system automatically closes the alert.

Procedure

1. Go to Advisors > Alerts.
2. Open the alert that you want to close.
3. Click Mark Complete.
   If the alert should be canceled instead, you can click Close Alert and then select "Canceled" as the status.

Related tasks

- Close an activity for an alert
- Evaluate automated alert rules using the delivered workflows

Add or remove tasks in alerts

You can add tasks to or remove tasks from an alert.

Procedure

1. Go to Advisors > Alerts.
2. Open the alert for which you want to add or remove tasks.

3. Under the Tasks tab, do the following:
    - To add a task to the alert, click Add Task record, enter the task details, and click Save. For more information about creating tasks, see the Microsoft Dynamics 365 Help.
    - To remove a task from the alert, select the name of the task, and then click Delete.
4. Click Save.

Add or remove activities in alerts

You can add activities to or remove activities from an alert.

Procedure

1. Go to Advisors > Alerts.
2. Open the alert for which you want to add or remove activities.
3. On the navigation bar, click the down arrow to the right of the alert, and click Email Messages, Letters, or Phone Calls.
   The corresponding Associated View is displayed.
4. Do the following:
    - To add an activity to the alert, click the appropriate Add New button, enter the activity details, and click Save. Repeat this step to add additional activities to the alert. For more information about creating activities, see the Microsoft Dynamics 365 Help.
    - To remove an activity from the alert, select the name of the activity, and then click the appropriate Delete button.

Add or remove private notes in alerts

You can add private notes to or remove private notes from an alert.

Procedure

1. Go to Advisors > Alerts.
2. Open the alert for which you want to add or remove private notes.
3. In the Private Notes section, do the following:
    - To add a private note to the alert, click Add Private Note record. In the provided fields, enter a title and description for the private note, click Lookup to select the student to associate with the private note, and then click Save. Repeat this step as needed to add additional private notes to the alert.
    - To remove a private note from the alert, select the name of the private note, and click Delete.

4. Click Save.

Allow Advise to send emails to students on your behalf

Some alerts and engagement plans can send an email to your students on your behalf.

About this task

Your institution creates emails on your behalf to personalize outreach to students who need additional assistance and give them a point of contact. You must allow Advise to send these automated emails.

Note: The following setting displays only if your administrator turned on email integration with Advise.

Procedure

1. From the navigation bar on the right, click Settings .
2. Click Options.
3. Select the Email tab.
4. Verify that Allow other Microsoft Dynamics CRM users to send email on your behalf is selected.
5. Click OK.

Private notes

A private note is a note that only you can view about a student or an alert. You can share private notes with other users or teams as needed.

You can create a private note for information that should not be made accessible to all users, such as personal details about a student or information that is restricted by law. Information that is not private can be added to a post or note, which are native CRM features. These items can be viewed by anyone who has access to the student or alert record. For more information, see the Microsoft Dynamics 365 Help.

View private notes for a student

You can view private notes that are posted for a student on the student's profile.

About this task

Note: Private notes are only displayed to the owner of the private note and to other users with whom the private note has been shared.

Procedure

1. Go to Advisors > My Students.
2. Open the student for whom you want to view private notes.
3. In the Private Notes section, view the private notes that are associated with the student.

Related tasks

- Share a private note with other users or teams

Create a private note for a student

You can create a private note for a student on the student profile.

Procedure

1. Go to Advisors > My Students.
2. Open the student for whom you want to create a private note.
   Private notes that are created on the student profile are also displayed on the student section record.

   Note: Private notes are only displayed to the owner of the private note and to other users with whom the private note has been shared.

3. In the Private Notes section, click Add Private Note record ➕. In the provided fields, enter a title and description for the private note, and then click Save. Repeat this step as needed to add additional private notes.

Related tasks

- Share a private note with other users or teams

Create a private note for an alert

You can create a private note for an alert on the alert record.

Procedure

1. Go to Advisors > Alerts.
2. Open the alert for which you want to create a private note.

   Note: Private notes are only displayed to the owner of the private note and to other users with whom the private note has been shared.

3. In the Private Notes section, click Add Private Note record ➕. In the provided fields, enter a title and description for the private note, click Lookup 🔍 to select the student to associate

with the private note, and then click Save. Repeat this step as needed to add additional private notes.

Related tasks

- Share a private note with other users or teams

Share a private note with other users or teams

You can share a private note for a student or an alert with other users or teams.

Procedure

1. You can access private notes from the following locations.

Location	Go to
Alert	Advisors > Alerts. Open the alert for which you want to change privileges for a private note.
Student Profile	Advisors > My Students. Open the student for which you want to change privileges for a private note.

2. In the Private Notes section, open the note that you want to share with other users or teams.

   Note: You can share only the private notes that you have created.

3. Click More Commands , and then click Share.
4. In the Share private note window, click Add User/Team to select a user or team.
5. In the Look Up Records window, Look for field, select User if you want to share the private note with a single user or Team if you want to share the private note with a team.
6. Select the name of the user or team, and click Select.
   You can also create a new user or team if needed by clicking New. For more information, see the Microsoft Dynamics 365 Help.
7. Click Add.
   The users or teams are added to the Share private note window with the "Read" privilege selected by default.
8. To set additional privileges for the private note that you are sharing, select the appropriate privileges next to the name of the user or team that you added.
   To select all privileges, select the user or team name, and then click Toggle All Permissions of the Selected Items.
9. Click Share.

Change user or team privileges for a private note

You can change user or team privileges for a private note for a student or an alert.

Procedure

1. You can access private notes from the following locations.

Location	Go to
Alert	Advisors > Alerts. Open the alert for which you want to change privileges for a private note.
Student Profile	Advisors > My Students. Open the student for which you want to change privileges for a private note.

2. In the Private Notes section, open the note for which you want to change privileges.

   Note: You can change privileges for only the private notes that you have created.

3. Click More Commands, and then click Share.
4. To change privileges for the private note that you are sharing, in the Share private note window, select the appropriate privileges next to the name of the user or team in the list.

   Note: To remove a user or team from the list, select the user or team name, and then click Remove Selected Items.

5. Click Share.

Send mobile notifications

A mobile notification is a message that is sent to a student's mobile device.

The system generates mobile notifications automatically based on the mobile notification templates that are assigned to alert rules or engagement activities. You can also manually send mobile notifications to a student for immediate delivery or schedule them to be sent on a specific date.

Send a mobile notification to a student for immediate delivery

You can create a mobile notification and immediately send it to a student.

About this task

Note: To receive mobile notifications, students must download the Ellucian GO app and register their mobile device.

Procedure

1. Go to Advisors > My Students.
2. Open the student for whom you want to create a mobile notification.
3. Click More Commands, and then click Start Dialog.

4. In the Look Up Record window, select Send Mobile Notification, and then click Add.
5. In the Send Mobile Notification dialog, select Yes to create the mobile notification from an existing mobile notification template, and then click Next.
6. If you selected Yes in step 5, enter information in the following fields as needed.
    - Mobile Notification Template. Enter the name of the mobile notification template. You can use Lookup to select the template name.
    - Expiration. Select the date on which the notification will expire on the Ellucian GO server. If you do not specify a value, the default expiration on the Ellucian GO server is used.
7. If you selected No in step 5, enter information in all required fields and additional fields as needed.
    - Mobile Headline. Enter the headline that will be displayed on the mobile device when the notification is received.
    - Headline. Enter the headline that will be displayed in the Ellucian GO application.
    - Description. Enter a detailed description that will be displayed on the mobile device when the notification is received.
    - Destination URL. Enter the URL that should be displayed in the mobile notification. You can provide a destination label and URL in the notification to point students to additional information or a website to complete an action.
    - Destination Label. Enter the label that will be displayed beside the destination URL in the mobile notification. You can provide a destination label and URL in the notification to point students to additional information or a website to complete an action.
    - Push Notification. If you want the notification to be pushed to the student's mobile device, select Yes. If you want the notification to be retrieved when the student connects to Ellucian GO, select No. If you select "Yes" and a student is not registered for push notifications, the notification will be retrieved when the student connects to Ellucian GO.
    - Expiration. Select the date on which the notification will expire on the Ellucian GO server. If you do not specify a value, the default expiration on the Ellucian GO server is used.
8. Click Next.
9. Click Finish.

Result

The system immediately sends the mobile notification to the student and marks it complete. If you did not create a push notification or if the student is not registered for push notifications, the notification will be retrieved when the student connects to Ellucian GO.

Send a mobile notification to a student on a scheduled date

You can create a mobile notification and send it to a student on a specific date.

About this task

Note: To receive mobile notifications, students must download the Ellucian GO app and register their mobile device.

Procedure

1. Go to Advisors > My Students.
2. Open the student for whom you want to create a mobile notification.
3. In the Posts, Activities, and Notes area, click the Activities tab.
4. Click Add more activities ..., and then click Mobile Notification.
5. Enter information in all required fields and additional fields as needed.
   - Mobile Headline. Enter the headline that will be displayed on the mobile device when the notification is received.
   - Headline. Enter the headline that will be displayed in the Ellucian GO application.
   - Description. Enter a detailed description that will be displayed on the mobile device when the notification is received.
   - Activity Code. Enter the associated activity code for the mobile notification. The activity code allows you to categorize the type of activity that the notification is regarding. For example, you could create different activity codes for registration and financial aid activities and apply them to the notification. An activity is created for each student when the notification is created.
   - Regarding. By default, the system enters the name of the student you selected. You can use Lookup to select a different student.
   - Destination Label. Enter the label that will be displayed beside the destination URL in the mobile notification. You can provide a destination label and URL in the notification to point students to additional information or a website to complete an action.
   - Destination URL. Enter the URL that should be displayed in the mobile notification. You can provide a destination label and URL in the notification to point students to additional information or a website to complete an action.
   - Expiration. Select the date on which the notification will expire on the Ellucian GO server. If you do not specify a value, the default expiration on the Ellucian GO server is used.
   - Scheduled Send On. Select the date on which you want the notification to be sent to the student.
   - Push Notification. If you want the notification to be pushed to the student's mobile device, select Yes. If you want the notification to be retrieved when the student connects to Ellucian GO, select No. If you select "Yes" and a student is not registered for push notifications, the notification will be retrieved when the student connects to Ellucian GO.
6. Click Save.

What to do next

When the Send Mobile Notifications workflow is run, Advise will send mobile notifications to all students and mark them complete.

Related concepts

- Advise workflows schedule guidelines

View scheduled mobile notifications for a student

You can view mobile notifications that are scheduled to be sent to a student on the student's profile.

Procedure

1. Go to Advisors > My Students.
2. Open the student for whom you want to view mobile notifications.
3. In the Posts, Activities, and Notes area, click the Activities tab.
4. You can view all open activities, including mobile notifications, that are associated with the student.

View Degree Works audits

If your institution has enabled Degree Works integration and you have the applicable permissions, you can view academic, financial aid, and athletic eligibility audits from the student profile.

About this task

Keep the following in mind:

- Audits are by academic program.
- The audits open in a separate window on top of your Advise session. You must enable pop-up windows in your browser.
- Financial aid and athletic eligibility audits appear only if they apply to the student.
- Unless your institution has turned off the ability to see financial aid and athletic eligibility audits in Advise, you can see all audits that apply to the student, regardless of your user access in Degree Works.

Procedure

1. Access the applicable student record.
2. Access the audits.

Method	Instruction
Access the audits for the student's primary academic level.	a. On the student profile page, click Degree Works Audit. b. Click the available audit tabs as necessary.
Access the audits by academic program.	a. On the student profile page, under Active Student Programs, open the applicable program. b. Click Degree Works Audit. c. Click the available audit tabs as necessary.

View Degree Works student education planners

If your institution has enabled Degree Works integration and you have the applicable permissions, you can view student educational planners (SEPs) from the student profile.

About this task

- If a SEP is inactive or unlocked in Advise, the sync process removes the SEP from Advise. It also removes active but unlocked SEPs.
- The SEP in Advise is a real-time view of the SEP in Degree Works. Data in the SEP entities from the sync process may be different from what you see due to execution timing of the SEP. To get the most recent SEP data, you can run the Degree Works SEP Sync workflow.
- All active SEPs display in Advise. You can toggle through the active SEPs to view all detail about the student.

Procedure

1. Access the applicable student record.
2. Click Degree Works SEP.
3. If desired, click any of the Notes icons that are blue.
   You can see who entered the note and when. "Internal" appears for internal notes. If you do not see "Internal," it is an external note, which students can see if Degree Works.

Download the mobile app to use Advise on a mobile device

To use Advise on a device other than your computer, you need to first download the mobile app to the mobile device.

About this task

Keep the following in mind:

- Advise supports the mobile app for iPad.

- Ellucian has enabled the Advising dashboards and Student Profile within the mobile app.
- The Student Profile Success Score Chart is not available.
- Private notes are read-only.
- All custom icons display using the default gear icon.

Procedure

1. Access the following link to find the mobile app download.
   https://docs.microsoft.com/en-us/dynamics365/customer-engagement/mobile-app/v8/go-mobile/get-started/install
2. Follow the instructions provided.

Related concepts

- Mobile app setup

Case Manager functions

Case management allows you to keep track of any student issues.

The Case Management dashboard

The Case Management Dashboard contains a high-level look at the information that you need when managing student cases, such as a list of your active cases and your activities.

If you have the Case Manager all Student Access role, you have access to both the Case Management All Student Access and the Case Management dashboards. The Case Management All Student Access dashboard defaults to the "All Active Students" view, which shows you all students. The Case Management dashboard defaults to the "My Active Students" view, which shows you all students directly assigned to you through your ERP system or extended student access.

From the dashboard, you can do the following:

- View your assigned students.
- Search for specific students.
- View your active cases.
- View your activities.
- Change the view for specific sets of students. For example, you can switch to your "My Inactive Students" or "My Students with Open Cases Owned by Me or My Team" view.
- Drill into other records, such as an open case.

Note: Activities are a native CRM feature. For more information, see the Microsoft Dynamics 365 Help.

Create a case

You can create a case to keep track of any student issues.

About this task

Note: For help with reassigning a case, resolving a case, or managing parent-child cases, see the Microsoft Dynamics 365 Help.

Procedure

1. Go to Case Managers > Manage Cases.
2. Click New Case.

3. In the Case Details section, enter or select the applicable information in all required fields and additional fields as needed.
4. In the Description area, enter a brief summary.
5. Click Save.
6. Keep or route the case as necessary.

Option	Instruction
Send the case to a team.	Click Save & Route.
Keep the case yourself.	On the stage bar, click Next Stage. You can save an exit the case or continue working on it.

Note: Moving a case through the stages is a manual process. You must click Next Stage at each stage.

Related tasks

- Create a subject
- Create a team
- Set up routing rules for case management
- Share a case
- Remove a user from a case

Share a case

After the originator routes a case, you can share the case.

About this task

Warning! When you create a case and then save and route, the case goes to a person or, as Ellucian recommends, a team. Only that team and the person who created the case can see it, though each team member must also individually have access to the student. If you want anyone else to see the case, you must share it. As with team members, those you share a case with must individually have access to the student. For example, if you want advisors who are not on the team to which a case was routed initially to see it, but only in an Advisor role, you have two options. You can share it with the advisor(s) directly, or you can create an Owner team with an Advisor role and add the advisor(s) to it. The advisors with access to the student will see the case on the student profile.

Procedure

1. Access the applicable case.
2. On the stage bar, click Next Stage.
3. On the command bar, click ••• > Share.
4. Click Add User/Team.

5. In the Look for field, select Team.
6. Select the applicable team, click Select, and then click Add.
7. Select the applicable permissions.
8. Click Share.

Related tasks

- Create a subject
- Create a team
- Set up routing rules for case management
- Create a case
- Remove a user from a case

Remove a user from a case

You can remove a user from a case.

About this task

The originator of a case will retain access even after routing the case to the applicable team. Similarly, if you reroute a case, the previous owner will also retain access. You may want to remove those users from the case.

Procedure

1. Access the applicable case.
2. On the command bar, click  > Share.
3. Select the name of the user, and click Remove Selected Items.
4. Click Share.
5. Click Save & Close.

Related tasks

- Create a subject
- Create a team
- Set up routing rules for case management
- Create a case
- Share a case

Success Manager functions

The Managers area allows you to view overall risk levels for your institution, identify details by advisor and student, and view reports that track key indicators of student success and retention over a period of time.

You can access this area of Advise if you are assigned the "Success Manager" security role.

Within the Managers area, you can view the Student Success Dashboard, information about each high-risk student, any related records, and reports. You can also view and manage certain student details that are available to advisors, such as scores, score components, alerts, activities, private notes, mobile notifications, and messages.

Related concepts

- Advisor functions

View the Student Success Dashboard

The Student Success Dashboard contains a high-level look at the information that you need as a manager of student success and retention, such as activities for you or your team and charts that show overall risk levels, at-risk students by advisor, or alerts by advisor.

You can access the Student Success Dashboard by clicking Managers > Dashboards.

From the dashboard, you can do the following:

- View a risk-level snapshot of all students, as determined by the success scores in relation to the defined scoring bands. You can change the scoring plan and score component to show more specific data.
- View the number of at-risk students who are assigned to each advisor.
- View the number of open alerts by severity, advisor, and status.
- View your activities.
- Change the view for specific activities. For example, you can see activities for your team by selecting the "My Team Members' Activities" view.
- Drill into other records, such as the activity or "Regarding" record, to access additional details.
- Drill into chart components to display the records that are used to generate the chart or to display related fields in the chart.

Note: Activities are a native CRM feature. For more information, see the Microsoft Dynamics 365 Help.

View all advising appointments

As a manager, you can view all advising appointments for your institution.

About this task

For more information about the advising calendar, see the Microsoft Dynamics 365 Help.

Procedure

1. Go to Managers > Advising Calendar.
2. Filter and view advising appointments as needed. To see a particular advisor's appointments, enter the name in the Search for records field. Selecting a name from the full calendar view only highlights the row.

View student risk levels

You can view overall risk levels for all students in your institution.

Procedure

1. Go to Managers > Dashboards.
2. In the Risk Level Snapshot section, you can view how many students are in each risk level range based on the student's success score. The scoring band that is defined for the student's scoring plan determines which risk level range a student's success score falls into. The scoring band ranges are configured initially by your institution.
   In this chart, you can do the following:
   - View risk level by scoring plan. In the Scoring Plan field, select the scoring plan that you want to view. Only the risk levels for students with that scoring plan will be displayed.
   - View students in each risk level range. Click View to view a list of students who are in that risk level range, sorted in ascending order by score.

View at-risk students and open alerts by advisor

You can view at-risk students and open alerts by advisor.

Procedure

1. Go to Managers > Dashboards.
2. In the At-Risk Students By Advisor chart, you can view all high-risk students by advisor. The scoring band that is defined for the student's scoring plan determines which risk level range a student's success score falls into. The scoring band ranges are configured initially by your institution.
   In this chart, you can do the following:

- Display student records. Click View the records that are used to generate the chart to display the student records that are used in this chart. A new window is displayed that lists all of the high-risk students. From this list, you can search for students and open specific student records.
- Display related field as a chart. Click a bar on the chart, select the related field of the Person entity that you want to view, select the chart format that you want to be displayed, and click OK. The chart is regenerated with the related field data in the chart format that you selected.

Note: This chart will display up to 20 advisors by number of at-risk students.

3. In the Open Alerts By Severity, Per Advisor chart, you can view open alerts for all severity levels by advisor.
   In this chart, you can do the following:

   - Display alert records. Click View the records that are used to generate the chart to display the alert records that are used in this chart. A new window is displayed that lists all of the open alerts. From this list, you can search for alerts, filter alerts by due date, and open specific alert records.
   - Display related field as a chart. Click a bar on the chart, select the related field of the Alert entity that you want to view, select the chart format that you want to be displayed, and click OK. The chart is regenerated with the related field data in the chart format that you selected.

   Note: This chart will display up to 20 advisors by number of open alerts.

View alerts by status

You can view a count of how many alerts are open, or were completed or canceled on today's date.

Procedure

1. Go to Managers > Dashboards.
2. In the Alert By Status chart, you can view a count of all currently open alerts, regardless of date, with a count of all alerts that were completed and canceled during the day.

View overdue tasks and phone calls by due date and alert rule

You can view overdue tasks by due date and alert rule to compare overdue tasks between different staff members or teams.

Procedure

1. Go to Managers > Dashboards.
2. On the navigation bar, click the down arrow to the right of Dashboards, and click Alert Task and Activity Management.

Result

The Overdue Task by Due Date and the Overdue Tasks by Alert Rule charts are displayed.

View high-risk students

You can view high-risk students and access student profiles as needed.

Procedure

1. Go to Managers > High-Risk Students.
2. In the list, open the student's record you want to view.
The following information appears on the student profile.

Tab	Section	Description
Summary	Student Details	Contains important student information, such as the student's academic standing, primary academic level, class level, overall GPA, success score, scoring plan, and first term enrolled. You can also access related records to review additional details, for example, the student's success score record or scoring plan record.
	Indicators	Lists the indicators that apply to the student.
	Current and Future Enrolled Student Sections	Lists the course sections that the student is enrolled in for current and future terms. You can also change the view to see all enrolled course sections for the student.
	Majors	Lists the student's majors.
	Active Student Programs	Lists the student's active student programs. You can also change the view to see

Tab	Section	Description
		student programs that have ended for the student.
	Alerts	Lists the alerts for the student. You can access alert records or eligible alert rules as needed. Note: If the alert came from the student experience site and the student uploaded a file, an attachment icon appears. If someone removes the attachment, the icon remains.
	Success Score Performance	Displays a chart that shows the student's success score performance over a period of time.
	Posts/Activities/Notes	Enables you to view and enter posts, activities, and notes, which are native CRM features. These items can be viewed by anyone who has access to this student record. For more information, see the Microsoft Dynamics 365 Help.
	Private Notes	Displays private notes. These notes can be viewed only by users with privileges to view them. You can share private notes with other users or teams as needed.
Communications	Not applicable	Displays engagement plans and communications plans that the student is part of. For engagement plans, Advise displays any plan with activities associated with an engagement list that the student is part of, even if the activities have not yet been distributed. For

Tab	Section	Description
		communication plans, Advise displays any plans with distributed activities where the student is part of the communication member list.
Recruiter Communication	Not applicable	Appears only if your CRM Advise organization integrates with CRM Recruit. Displays all recruiters who have had the most contact with this student and their most recent activity.
Cases	Not applicable	Displays the cases opened for the student that are owned or shared by you or your team. You can access case records as needed.
Details	Personal	Contains additional student information, such as name, contact information, demographic information, and other indicators for students like restriction, first generation, or student athlete.
	Status Information	Contains current status details about the student, such as student type.
	Prior Academic History	Contains academic history about the student, such as total credits earned; international or transfer indicators; and additional GPAs.
	Financial Aid	Contains financial aid details. You will see these details only if you have been assigned access permissions to view financial aid fields.
	Full Address	Contains the student's complete address.
	Current Success Score Details	Contains the student's success score record.
	Academic Standing History	Contains the student's academic standing history.

Tab	Section	Description
	Student Advisors	Lists the student's assigned advisors.

View reports

You can view reports that track key indicators of student success and retention.

Procedure

1. Go to Managers > Reports.
2. Open the report that you want to view.
   The following table shows the delivered reports and descriptions.

Report	Description	Additional Information
Alert Activity Processing Over Time	Displays a breakdown of alert activities based on the dates created and closed, to look for any trends in processing.	You can run this report to show a maximum duration of 366 days.
Alert Processing Over Time	Displays a breakdown of alerts based on the dates created and closed, to look for any trends in processing.	You can run this report to show a maximum duration of 366 days.
Alerts By Variable	Displays a severity breakdown of current alerts by variable such as academic program, class level, major, risk condition, owner, and source.	You can replicate the results of this report in Advise by counting the number of open alerts for a selected student population. Adivse then filters by the following: • Academic Program - only the current program participation displays • Class Level • Condition - the risk conditions used to trigger the alerts • Major - only the current major participation displays • Owner - the assigned Advise user displays • Source

Report	Description	Additional Information
		The filters display the top eight results for each category, sorted by the total number of alerts generated.
Course Scores By Variable	Displays a breakdown of current course socres by variables such as course, section, and instructor.	You can replicate the results of this report in Advise by looking for students currently enrolled in classes with Course Scores generated that fall into any scoring band (red, yellow, or green). Advise then filters by the following: • Academic Program - only the current program participation displays • Course • Instructor • Scoring Plan - the plan currently used to assess a student's risk and calculate a course score • Section The filters display the top eight results for each category, sorted by the total number of high risk (red) scores generated.
Course Scores Over Time By Variable	Displays an average of course score values over a defined period of time by variables such as course, section, and instructor.	You can replicate the results of this report in Advise by averaging the Success Scores for the selected student population, over the period of time you specify. Advise then filters by the following: • Course • Section • Instructor The filters display the top eight results for each category, sorted by the total number of scores generated.
Student Intervention Over Time	Shows the average success score over time alongside the number of open activities.	You can replicate the results of this report in Advise by averaging the Success

Report	Description	Additional Information
	You can see potential Success Score gains that may be due to activity-based engagement efforts.	Scores for the selected student population, over a period of time you specify. The report then counts the number of open activities for the population and plots this data over the same period of time.
Student Risk By Variable	Displays a breakdown of at-risk students by variables such as class level, program, and scoring plan. Students who have a red or yellow success score are at risk.	You can replicate the results of this report in Advise by looking for students with a current Success Score that does not fall into the green scoring band. The report then filters by the following: • Academic Program - only the current program participation displays • Class Level • Major - only the current major participation displays • Scoring Plan - the plan that currently assesses a student's risk and calculates a course score • Academic Load Status The filters display the top eight results for each category, sorted by the group with the highest number of at-risk students (yellow or red success score).
Success Scores By Variable	Displays a breakdown of current success scores for students by variables, such as class level, program, and scoring plan.	You can replicate the results of this report in Advise by looking for students with a current Success Score gnerated and falls into any scoring band (red, yellow, or green). The report then filters by the following: • Academic Program - only the current program participation displays • Class Level

Report	Description	Additional Information
		• Major - only the current major participation displays • Scoring Plan - the plan that currently assesses a student's risk and calculates a course score • Academic Load Status The filters display the top eight results for each category, sorted by the total number of students.
Success Scores Over Time By Variable	Displays a risk breakdown of Success Scores over time by a number of different variables such as class level, program, and scoring plan.	You can replicate the results of this report in Advise by averaging the Success Scores for the selected student population, over a period of time you specify. The report then filters by the following: • Academic Program • Class Level • Major • Scoring Plan - the plan that currently assesses a student's risk and calculates a course score • Academic Load Status

3. In the Advanced Find window, you can optionally define criteria to limit the data represented in the report, and then click Run Report.
4. Make selections in the data fields on the report, and then click View Report.

   Note: At any time, to change the default filter for the report, click Edit Filter. The Advanced Find window is displayed again so that you can select the data that you want to display in the report. When you are finished, click Return to Report.

Resynchronize student ERP data

You can resynchronize student ERP data for a specific set of students to ensure that Advise records are current.

About this task

Keep the following in mind:

- Ellucian recommends resynchronizing student data for a maximum of 30 students to allow the sync to complete in a timely manner. This feature is not meant to replace initial provisioning workflows for large numbers of missing student data.

  Warning! It is possible to set the maximum to 250 students (Settings Options), but it is a general setting that will impact all list views. Ellucian recommends using a workflow instead.

- If you are synchronizing newly admitted students, you might want to create a new view to support the import.
- Advisors with the Student Sync Access role can resynchronize student data from the student profile.
- This process does not resynchronize financial aid data, and for some data, including student sections, Advise resynchronizes only for the current term.

Procedure

1. Go to Settings > Settings Home.
2. Click Resync Student ERP Data.
3. Optional: If you want to recalculate all alerts and success scores for the students after the ERP data is resynchronized, select the Recalculate alerts and success scores when finished check box.
4. On the Sync Student ERP Data window, click the synchronization option.

Option	Description
Sync All Students on Page	Synchronize the ERP data for all students on the page.
Sync Selected Students	Synchronize the ERP data for the selected students.
Sync Missing Students	Synchronize the ERP data for students who have active registrations in the ERP, but are not provisioned into Advise. Note: System administrator access is required to sync missing students.

5. Click OK to confirm that you want to sync at this time.

Related tasks

- Import newly admitted students into Advise
- Import data using the Import Data Wizard
- Import data using an Automated File Import
- Include newly admitted students in scoring
- Create a workflow
- Create a workflow schedule

Specify the date range for faculty member access to student records

The faculty student access date range allows you to specify the duration in days after a term ends until faculty members will lose access to the records of their students.

Procedure

1. Go to Settings > Settings Home.
2. Click Faculty Student Access Date Range.
3. Enter the number of days after a term ends until faculty members will lose access to the records of students that they are teaching.
4. Click OK.

Text messaging

View incoming and outgoing text messages

View the text messages that have been sent and received in Advise.

About this task

Advise delivers multiple views for text messages to help you manage the text messages being sent and received by your institution such as all incoming and outgoing text messages, text messages pending review, and text messages that have been reviewed.

Procedure

1. Go to one of the following locations:
   - Advisors > Messages
   - Case Managers > Messages
2. Go to Communications > Messages.
3. Go to Recruitment > Messages.
4. Select the appropriate view for the text messages you want to view.

View text message history

You can view the incoming and outgoing text messages to a constituentstudent in date order to see the conversation history with the constituentstudent.

Procedure

1. Go to Constituents > People.
2. Go to Recruitment > People.
3. Open a person record.
4. Access the student record.
5. Click More Commands ..., and then click Messages.

Result

You can view the text message conversation history with the constituentstudent.

Send a text message to a student from Advise

You can send text messages to an individual personstudent using ad-hoc text or a text message template.

Before you begin

To send an ad-hoc text message to a personstudent, the personstudent must have Allow Contact set to Yes, SMS set to Allow, and have an unformatted messaging number.must have their communication preference of SMS Message set to Allow, must not have unsubscribed from text messages through Twilio, and must have a mobile phone number.

Procedure

1. Go to Constituents > People.
2. Go to Recruitment > People.
3. Go to one of the following locations:
   - Advisors > My Students.
   - Managers > High-Risk Students.
   - Case Managers > My Students.
4. Open a personthe applicable student record.
5. In the Details tab, under Personal, confirm that the student's mobile number appears in the Mobile Number field.
6. Click More Commands, and then click Messages.
7. Select the text message type.

Choice	Steps
Ad-Hoc Message	a. In the message field, enter the body of your text message. Note: Advise allows you to enter a maximum of 1,400 characters in the body of a text message. b. If you want to include an image in the message, in the Image URL field, enter the URL where the image resides. Note: • If you include an image in the text message, the recipient will receive a Multimedia Messaging Service (MMS) message, not a Service Messaging Service (SMS) message, and the recipient of the message might be subject to additional charges.

Choice	Steps
	• The file size of the image must be under 5 MB.
Message Template	a. In the Select a template dialog box, select a text message template to use for the text message. In the View field, you can filter the list of text message templates to display templates with a member type whose base entity is contact, or to display templates that do not have a member type specified. In the View field, you can filter the list of text message templates to display templates that match the Person Member Type or to display templates that do not have a member type specified. b. Click OK.

8. Click Send.

Result

Advise validates the student'sperson's contactcommunication preferences and mobile phone number, and then sends the text message to the personstudent. You can refresh the message history above the message send fields, or by you can view the outgoing message in the message history with the person.You can view the outgoing message in the Messages screen by refreshing it, on the student’s activity feed, or in any of your messages view that contain outgoing messages.

Mark an individual incoming text message as reviewed

Incoming text messages are given a Pending state in the Review Status field to indicate that they need to be viewed and responded to by your institution. After viewing the details of the text message, you can mark the text messages as Reviewed to indicate that the message has been viewed.

Procedure

1. Go to one of the following locations:
   - Advisors > Messages
   - Case Managers > Messages
2. Go to Communications > Messages.
3. Go to Recruitment > Messages.
4. From the list of views, select one of the My Pending Messages view or any view contains incoming messages.
5. Open an incoming text message.
   Advise displays the Messages: Information form.

6. Click Review, and then click Reviewed.
7. In the confirmation dialog box, click OK.

Result

Advise marks the incoming message as Reviewed. If necessary, you can change an incoming message back to "Pending" by performing the same steps and clicking Review, and then clicking Pending.

Mark multiple incoming text messages as reviewed

Incoming text messages are given a Pending state in the Review Status field to indicate that they need to be viewed and responded to by your institution. You can mark one or more text messages as Reviewed to indicate that the message has been viewed using one of the Pending Messages views.

Procedure

1. Go to one of the following locations:
   - Advisors > Messages
   - Case Managers > Messages
2. Go to Communications > Messages.
3. Go to Recruitment > Messages.
4. From the list of views, select one of the My Pending Messages views or any view contains incoming messages.
5. From the list of pending text messages, select one or more incoming messages to mark as reviewed.
   The Pending Messages views display both incoming and outgoing messages. Any selected outgoing messages will be ignored.
6. Click More Commands, click Review, and then click Reviewed.
7. In the confirmation dialog box, click OK.

Result

Advise marks the selected incoming messages as Reviewed. If necessary, you can change an incoming message back to Pending by performing the same steps and clicking Review, and then clicking Pending.

Communication plans

Communication plans allow you to create personalized outreach campaigns to students and staff.

You can use communication plans to remind people about upcoming events, such as registration or additional advising support for midterms. You can also use communication plans to help guide students who may need additional support, such as students who are enrolled in a STEM program or non-traditional students.

Communication plans can include one or more supporting activities, such as phone calls or emails. To further personalize activities within a communication plan, you can use conditions to branch the plan. For example, with branching you can have a plan that targets all STEM students, but then sends one email to math majors, another to life science majors, and another to engineering majors as the first communication.

Communication member types and lists

Communication plans contain member types and member lists.

Communication member types

Communication member types allow you to identify the general type of person (student or staff) you will target in a communication plan.

Within a member type, you can specify which field on the Member Type entity you should use to find a person's phone number or email address. You can also specify which entity field should indicate that a person has opted out of a communication channel. Additionally, it controls the communication list view you see for communication member lists on the communication plan. You can also assign a member type to a message template to support personalization.

In communication plans, you can use the Person and Event Participant member types. Person is the primary communication type if you want to reach out to students, but you can also use Event Participant to target students who have attended events.

Warning! You cannot use the Alert Member Type with communication plans.

Communication member lists

Communication member lists contain the student or staff you want to target in a communication plan.

You can categorize member lists as either static or dynamic. You must change records added to static lists manually, while Advise refreshes and repopulates dynamic lists at the frequency you define in a communication plan.

Keep the following in mind:

- After you select a member type and list type, you must save the form before you can add members.
- After you save the member list, you cannot change the type.

Create a dynamic member list

Dynamic member lists evaluate members at communication plan launch and at the interval you specify.

About this task

If the communication plan field Re-evaluate plan participation is set to `Yes`, for Calendar plans, it re-evaluates the list members every time an activity is distributed. For dynamic plans, it re-evaluates members based on the re-evaluation interval you specify in the plan.

Procedure

Create the member list

1. Go to Communications > Communication Member Lists.
2. Click New.
3. Enter information in all required fields and additional fields as needed.

Field	Instruction
List Type	Select or confirm `Dynamic`.
Member Type	Select the applicable member type.

Note: You cannot use the Alert Member Type with Email Service Templates. Doing so will result in an error when attempting to distribute email service emails.

4. Click Save.

Add members

5. From the Command Bar Ribbon, select Manage Members.
6. In the Select field, specify the query criteria that you want to define for the member list. For example, if you want to create a member list that contains all freshman students, you could specify `Class Level Equals Freshman` (or your institution's equivalent value).
7. Click Preview to see the list results.
8. Click Use Query.
9. Click Save & Close.

Create a static member list

Static member lists create a fixed group of staff or students that a communication plan will target. The list members change only if you manually add or remove them.

About this task

You can change the members at any time. If you set Re-evalutate plan participation feld to `Yes` for calendar plans, Advise uses whatever the current member list is each time it distributes an activity. For dynamic plans, Advise identifies the current member list using the re-evaluation interval specified in the plan.

Procedure

Create the list

1. Go to Communications > Communication Member Lists.
2. Click New.
3. Enter information in all required fields and additional fields as needed.

Field	Instruction
List Type	Select or confirm `Static`.
Member Type	Select the applicable member type.

Note: You can not use the Alert Member Type while configuring the Email Service Templates. Using the Alert Member Type results in an error when the communication plan using the email service template.

4. Click Save.

Add or remove members

5. From the command bar, select Manage Members.
6. Select the method you will use to add or remove members to the member list.

Option	Description
Add using Lookup	Allows you to add members using a lookup dialog.
Add using Advanced Find	Allows you to add members using search criteria in Advanced Find.
Remove using Member List	Allows you to remove members using the existing list of all members.
Remove using Advanced Find	Allows you to remove members using search criteria in Advanced Find.
Evaluate using Advanced Find	Allows you to evaluate members using search criteria in advanced find. You can add new members or remove those not found in the search results.

7. Click Continue.
8. Locate the records to add or remove from the Member List:
    - If you select Add Using Advanced Find, Remove Using Advanced Find, or Evaluate Using Advanced Find, specify the query criteria. You can see the results with the Preview button. When you are satisfied, click Use Query.
    - If you select Add Using Lookup, Remove Using Member List, or clicked Use Query in Advanced Find, the Selection Criteria dialog opens. Select the desired students to add or remove, and then click OK.

    A Process Members window appears with the status of the addition or removal.
9. Click Close when processing is complete.
10. Click Save & Close.

Send a text message to a communication member list

You can send a text message to a communication member list.

About this task

Keep the following in mind:

- To send messages from your Twilio phone number, the list size cannot exceed the Twilio Threshold setting value.
- Advise does not send a student a text message if their SMS Messages communication preference field is set to Do Not Allow.

  Note: If the SMS Messages communication preference is set to Allow, Twilio will prevent the message from being sent if the student has unsubscribed through Twilio.

Procedure

1. Go to Communications > Communication Member Lists.
2. Select the applicable list, and then click Send Message.
3. Select a template from the Message Template field, or enter content in the Message Body field and a URL in the Image Url field.
4. Click Continue.
5. Click OK.

Create a communication plan

Communication Plans allow you to define your target members, the start and end dates of the plan, and how often the members should be re-evaluated. You can create a new communication plan or copy an existing plan.

About this task

Keep the following in mind:

- There are three plan types.
  - Calendar plans distribute activities on the dates specified in the plan.
  - Dynamic plans distribute activities based on the date the member joined the plan.
  - Relative wait plans distribute activities before, on, or after a date from a related date field.
- If you use the business process flow ribbon, you must enter dates in the Planned Start Date and End Date fields to move to the next stage. If you only use the main form, you do not need to enter these dates until you are ready to change the Status Reason field to `Ready to Launch`.
- The communication plan and communication member list must have the same Member Type.
- You can view all activities and communication branches in a communication plan with the plan editor.
- All communication plans start in a draft state. The plan will not launch until you change the Status Reason field to `Ready to Launch`.
- After a plan is active, you can make changes only by changing the Status Reason field to `Suspended for Edits`. When you are done making changes, you must set it back to `Ready to Launch` if it has not started, or `Launched` if it has. The communication activities resume the next time you or Advise execute the workflow. For dynamic plans, Advise resumes distributing activities when you unsuspend the plan. For calendar and relative wait plans, Advise does not distribute any activity set to distribute in the past.
- A communication plan starts when you schedule and save associated activities and the plan reaches its start date.
- When the Task Service distributes a communication plan's activities, it creates individual activities for each member of the member lists.

Procedure

1. Go to Communications > Communication Plans.
2. Click New.
3. In the Information section, enter the applicable information in all required fields and additional fields as needed.

Field	Description
Member Type	Select the desired member type for this communication plan. Note: The Communication Member List and Communication Plan have to use the same Communication Member Type.

Field	Description
	Warning! You cannot use the Alert Member Type with communication plans.
Plan Type	Select the type of communication plan: • Dynamic - Dynamic plans distribute activities to members based on the date they joined the plan. They allow you to specify how often plans membership should be evaluated using the Re-evaluation Interval. The lowest interval you can set is 1 for one time a day. • Calendar - Calendar plans distribute activities on specified dates. Members who join the plan after one or more activities have been distributed will not receive those activities. Calendar plans allow you to specify whether plan membership should be re-evaluated using the Re-evaluate Plan field. If you set it to `Yes`, plan membership will be re-evaluated every time activities are distributed. • Relative Wait - Relative wait plans distribute activities before, on, or after a date from a related date field.

4. In the Schedule section, enter the applicable information in all required fields and additional fields as needed.

Field	Description
Re-evaluate Plan Participation	Select whether to re-evaluate plan participation. Select Yes if you want to re-evaluate plan participation. For dynamic plans, re-evaluation plan participation occurs on the interval you specify in the Re-evaluation Interval field. For calendar plans, re-evaluation occurs every time Advise distributes activities.
Re-evaluation Interval	For dynamic and relative wait plans only. Enter the number of days between re-evaluation. It must be a whole number.

Field	Description
	Note: The only thing that would impact the re-evaluation interval is if you manually run the Re-evaluate Communication Plan workflow. That sets the clock back to 0.
Rejoin Action	For dynamic plans only. Select one of the following options: • Start plan over - If members leave, and then rejoin the plan, they will receive all communications from the beginning of the plan, even if they have already received some of them. • Resume - If members leave, and then rejoin the plan, they will start receiving communications from the point at which they left the plan.
Relative Date Relationship	Select the entity that contains the date field that should drive the relative wait plan. The entity must be the Member Type itself or a related entity (N:1, which means many-to-one). If the field is on the Member Type entity, then select Use Member Type.
Relative Date Field	Select the date field that resides on the entity from the Relative Date Relationship field. The date in this field drives when the plan evaluates branches and distributes activities.
Triggered Plan	For information on triggered communication plans, see Triggered communication plans.

5. Click Save.

What to do next

After adding member lists and at least one communication plan activity, you must set the communication plan as `Ready to Launch` before executing the Evaluate Communication Plans workflow. Ellucian recommends that you schedule this workflow to run hourly to ensure that communication plans launch or resume on a timely basis.

Add a member list to a communication plan

You can add one or more communication member lists to a communication plan.

Procedure

1. Go to Communications > Communication Plans.
2. Select the communication plan you want to add a communication member list to.
3. Do one of the following to add a communication member list:
   - Click Add Communication List record and select a list.
   - Click Add Communication List record, click New, and create a new communication list.

     Note: The member type of the list and plan must match.
4. Optional: If you are using the process ribbon, select Complete in the Lists Added field.
5. Click Save.

Triggered communication plans

A triggered communication plan allows you to specify the circumstances under which Advise adds a student to a communication plan in near real-time without the assistance of a communication plan workflow.

A triggered communication plan differs from a traditional communication plan in that it adds student to a plan when you perform a specific action. Conversely, a traditional communication plan adds members to a plan when a workflow updates the plan. When you use a triggered communication plan, you eliminate the need to manually run the applicable workflow or wait for the workflow scheduler to run it to add the student to the communication plan and generate the appropriate activity record.

Warning! You should ensure that you have configured the workflow scheduler to Schedule the communication plan workflow on a specified cadence because triggered communication plans only send the first activity to a student after the triggered action adds the student to the communication plan. Advise uses the workflows (Evaluate Communication Plans and Re-Evaluate Communication Plan) to handle all subsequent activities.

For example, you can create a triggered communication plan that adds a student to a communication plan when a student transfers to your institution. As a result of transferring to your institution, you can send the student a welcome email. Because Advise adds a student to a triggered communication plan and generates the communication activity in near real-time, the student receives the welcome email shortly after you enter the student's information in Advise. With a traditional communication plan, the student would not receive the welcome email until after you add the student's information, the applicable workflow runs and adds the student to the plan, and then generates the email communication activity.

Another example would be to create a triggered communication plan that adds a student to a plan when their academic standing changes and they are now on orclose to academic probation. In this example, you might need to immediately communicate with a student to let them know what steps they need to take to get back in good standing. Because the email communication occurs in near real-time, you will give the student the maximum amount of time to take corrective action, and you can include information in the email that includes specific steps that the student can follow to avoid dismissal.

Triggered communication plan considerations

Before you create a triggered communication plan, keep in mind the following:

- Triggered communication plans apply to:
  - Dynamic and Relative Wait communication plans. If the value in the Plan Type field is Calendar, the triggered plan fields do not appear.
  - Plans that allow re-evaluation of plan participation. If the value in the Re-evaluate Plan Participation field is No, the triggered plan fields do not appear.
  - Communication plans that contain a status of Launched. If the communication plan does not contain a status of Launched, Advise does not add student to the plan in real-time. When you first launch a plan, the students that are part of the communication list receive the triggered communication activity during the initial evaluation.
- After you create a triggered communication plan, when you use the Plan Editor to establish the plan's activities:
  - You can click Add New Triggered Activity to add the new triggered activity. This option only appears on the Start node.
  - If you use the Channel field to select a value of Appointment, Phone Call, Fax, or Letter, a warning appears because you can only trigger a real-time activity, which includes Email, Email Service, Message, or Mobile Notification.
  - The word Triggered appears above the activity in the Plan Editor instead of the process time during which Advise would typically process a traditional communication plan. This occurs because an action of adding or updating a record triggers the recalculation of the plan instead of a workflow on a specified cadence.
  - The Process Time, Expiration, and Failure Processing fields do not appear because they do not apply to triggered communication activities.
  - The Plan Editor contains an inquiry only field named Triggered Activity. When you create a new triggered activity at the top of the branch, Advise automatically sets the value in this field to Yes. If the activity is not a triggered activity, Advise automatically sets the value in this field to No. You cannot modify the default value.

After you create a triggered communication plan and all of its activities:

- When Advise adds a student to a communication plan, it does not immediately update all of the statistics in the communication plan. For example, if the Plan Editor indicates there are two hundred students in the communication plan, and you add or update a record that adds a student to the communication plan in near real-time, the triggered communication activity in the Plan Editor will update to two hundred and one. However, the main branch and all other statistics continue to say two hundred. When the full re-calculation workflow runs manually or on the specified interval, it updates all of the remaining statistics. There will be a discrepancy between when the triggered communication plan added the student to the plan and when the re-calculation workflow updated the communication plan's statistics.
- After the addition or update of a record triggers the communication plan to add the student to the plan, when you view the Communication Plan Logs section of the Communication Plan profile, you can view the individual record that triggered the addition. The name of the Log Type for the record is Triggered Activity Distribution. Advise does not create a new Triggered Activity Distribution log file each time a new student enters the plan. Instead, when a student enters a communication plan, Advise adds that information to the existing log. Advise consolidates all of the triggered entries in the one log file to decrease the number of extraneous log files, to assist

in the location of specific records, and to improve system performance. You can drill down from the Communication Plan Logs section of the Communication Plan profile to view the details of the log, which includes records of the addition to the plan and the branch. Additionally, a communication plan log with a type of Triggered Plan Re-evaluation contains two records (Detail Status - Entered Plan and Detail Status - Entered Branch) for each student who entered the communication plan through the trigger. This log functions the same way as the Triggered Activity Distribution log file in that it uses the same log file instead of creating a new log each time a student enters the plan through a triggered activity.

- Triggered communication plans do not remove students from a communication plan. If a student no longer falls within the plans criteria, you must manually run the re-evaluate workflow or wait for the workflow scheduler process to run.

Triggered communication plan fields

The Communication Plan form includes fields that allow you to indicate whether the communication plan is a triggered plan and which criteria you want to trigger the addition of student to a communication plan when you add or update data.

Field	Description
Triggered Plan	Indicates whether Advise adds students to the communication plan when you add or update data that meets the requirement of one of the plan's communication lists. • No (default) = Advise does not automatically add students to the communication plan when you add or modify data. Advise adds students to the communication plan when the applicable communication plan workflow evaluates or re-evaluates the plan. The Trigger Plan On Create, Trigger Plan On Update, and Trigger Plan On Update Field fields do not appear. • Yes = Advise automatically adds students to the communication plans when you add or update specific data. When you select Yes, the Trigger Plan On Create and Trigger Plan On Update fields appear with default values of No and you can specify whether you want to Advise to add students when you add or update specific data, respectively.
Trigger Plan On Create	Indicates whether Advise automatically adds students to the communication plan when you add a record of the type specified in the Member Type field. For example, if the value in the Member Type field is Person, when you create a new student record, Advise adds the new student to the communication plan and generates the corresponding activity record. • No (default) = Advise does not automatically add students to the communication plan when you add a record specified in the Member Type field.

Field	Description
	• Yes = Advise automatically adds students to the communication plan when you add a record specified in the Member Type field.
Trigger Plan On Update	Indicates whether Advise automatically adds student to the communication plan when you update the value in the Trigger Plan On Update field. For example, if you want to want to trigger the communication plan to add a student when their major changes, you can set this value to Yes and then use the Trigger Plan On Update Field field to specify which major field triggers Advise to add the student to the communication plan and generate the activity record. No (default) = Advise does not automatically add students to the communication plan when you update a record specified in the Trigger Plan On Update Field field. Yes = Advise automatically adds students to the communication plan when you update a record specified in the Trigger Plan On Update Field field.
Trigger Plan On Update Field	Indicates which field triggers Advise to automatically add students to the communication plan and generate the applicable activity record. The field appears only when the value in the Trigger Plan On Update field is Yes. The fields that appear in this list apply to the type of member specified in the Member Type field. For example, if you select a Member Type of Person, this field contains transfer student information. If you want to create a triggered communication plan that updates automatically when a student transfers to your institution, you can select Person in the Member Type field, and then use this field to select the applicable transfer field that you want to trigger the update to the communication plan.

Restrictions for modifying an existing communication plan

The table below describes the plug-in, validation, and relationship logic and restrictions that dictate when you can and cannot make adjustments to communication plans.

Communication List

Entity	Field logic
Name	Must be populated
Member Type	• Must be populated

Entity	Field logic
	• Cannot be changed after creation
List Type	Cannot be changed after creation
Action	
Deletion / Deactivation	Allowed only if the communication list is not included in a plan where the Status Reason field is set to Canceled or Complete

Communication Plan

Entity	Field Logic
Name	Must be populated
Member Type	• Must be populated • Cannot be changed after creation
Plan Type	• Must be populated • Cannot be changed after creation
Planned Start Date	• Must be populated if Status Reason field is not set to Draft or Canceled • Must be on or before the date in the End Date field • If the date is updated, the date must be on or before any existing communication activities • If the date is updated and the plan has a plan type of Calendar, the date must be on or before the process date of any existing communication activities
End Date	• Must be populated if Status Reason field is not set to Draft or Canceled • Must be on or after today's date if the Status Reason field is not set to Canceled, Complete, or Complete With Pending Activities • If the date is updated and the plan has a plan type of Calendar, the date must be on or before the process date of any existing communication activities

Entity	Field Logic
Rejoin Action	Can be changed only when the Status Reason is set to Draft or Ready To Launch
Status Reason	• New plans must have the Status Reason field set to Draft • If updated to Ready to Launch, there cannot be an activity with an expiration date of ‘1/1/9999’ (the value that is populated when the plan is copied) • If plan is updated to Ready to Launch, Launched, or Suspended, there must be at least one communication list and at least one communication activity associated with the plan • If plan is updated to Ready to Launch, Launched and has a plan type of calendar, or Suspended, there cannot be any communication activities with warnings
Action	
Association	Lists can be associated with a plan only if: • The Status Reason field is set to Draft or Suspended for Edits • The member type of the list is the same as the member type of the plan
Disassociation	Lists can be disassociated from the plan only if the Status Reason field is set to Draft, Suspended for Edits, Canceled, or Complete
Deletion	Allowed only if the Status Reason field is set to Draft, Canceled, or Complete
Deactivation	Cannot be deactivated

Communication Branch

Entity	Field Logic
Name	Must be populated
Communication Plan	• Must be populated • Cannot be changed after creation
Type	• Must be populated • Cannot be changed after creation

Entity	Field Logic
	• If type is defined as the Trunk branch, only one trunk branch can exist in a communication plan. The trunk branch is created automatically with the creation of the plan.
Default	• Must be populated if the Type is set to Conditional • Cannot be changed after creation
Conditional Parent Branch	• Must be populated if the activity type is conditional and the default value is True • The communication branch specified must be part of the same communication plan • The communication branch specified cannot also be a parent to a merge branch • If the communication branch specified is a merge branch, you must ensure it has parent branches • Updates are allowed only if the Status Reason field is set to Draft
Conditional Default Branch	• Must be populated if the activity type is conditional and the default value is False • The branch specified must be a default branch
Condition	• Must be populated if the activity type is conditional and the default value is False • The condition must not be an aggregate condition • The condition must have criteria set • The condition member type must match that of the associated communication branch • Updates can occur if the Status Reason field is set to Draft or Suspended for Edits
Merge Child Branch	• Must be part of the same communication plan • Must not have a child conditional set • Must have a branch type of Merge

Entity	Field Logic
	• Updates can occur if the Status Reason field is set to Draft or Suspended for Edits
Action	
Deletion	Allowed only if • The branch type is not Trunk • The communication plan Status Reason field is set to Draft • The branch does not have a child branch • The branch does not have any associated communication activities • The branch does not have any siblings (if a default branch)
Deactivation	Cannot be deactivated

Communication Activity

Entity	Field Logic
All fields	Activity creation and updates can occur only if the plan Status Reason field is set to Draft or Suspended for Edits
Subject	Must be populated
Communication Plan	• Must be populated • Cannot be changed after creation
Communication Branch	Must be populated
Calendar Process Date	• Must be populated if plan type is calendar • Must be on or before the plan's planned / actual start date • Must be on or after the plan's end date
Expiration Date	• Must be populated if Activity Expiration field is set to Use activity expiration date • Must be on or after the plan's planned start date • Must not be a past date
Activity Code	Must be populated if the Suppress Duplicates field is set to Yes

Entity	Field Logic
Distribution Failure Processing	• Must be populated for activities in dynamic plans • There cannot be two communication activities set to Reprocess until complete on the same branch with the same offset and processing time
Channel	Must be populated
Activity Ownership	Must be populated
Email Template	• Must be populated if channel is Email • Email template type must match plan member type
Email Service Template	• Must be populated if channel is Email Service • Email service template type must match plan member type
Action	
Reparent	Communication activity cannot change branches unless the communication plan is in Draft status
Deletion	Allowed only if plan has its Status Reason field set to Draft, Suspended for Edits, Complete, Canceled or if plan is Null
Deactivation	Cannot be deactivated

Condition

Action	Field Logic
Deletion / Deactivation	Allowed only if not used by a communication branch in a plan

Email Service Templates

Action	Field Logic
Deletion	Allowed only if not used by a plan

Email Service Templates

Action	Field Logic
Deletion	Allowed only if not used by a plan

Communication plan activities and the plan editor

After creating a communication plan, you can define communication activities and plan branches using the communication plan editor.

About the plan editor

The communication plan editor functionality allows you to add activities in a format similar to a flow chart. Keep the following in mind:

- You can open the plan editor from a communication plan by clicking the Plan Editor button.
- You can edit the plan details by clicking the Show Plan Details button on the plan editor.
- The editor detail pane contains a Save icon to save changes you make to the activities and branches.
- You can position the plan within the window by dragging and dropping. You can also use your mouse wheel or the plus and minus buttons to zoom in and out.
- A tool tip window appears when you hover over a node.
- You can add or edit activities, conditions, and branches within the Plan Editor window or use the popout icon to make the changes within the form itself.
- You can share a communication plan outside of Advise by clicking the PDF Download button.

Communication plan editor options

The plan editor allows you to add, edit, and remove activities on a communication plan. It also has additional options for branching a plan to allow for different members receiving more targeted communications based on a condition. You can also merge a branched plan so that list members come back together to receive the same communication. The following list is all of the options available in the plan editor. The actual options displayed depend on which node of the plan is selected.

Add New Activity	Creates a new communication activity.
Set Relative Wait Days	For relative wait plans only. Sets a wait value driven by the value of the Relative Date field, which differs amongst plan members. You can set the distribution to before, on, or after the Relative Date field. This also applies to conditional branches.
Set Wait Days	For dynamic plans only. Sets a specified wait period between communication activities or before entering a branch. You can use wait days with activities, default branches, or sibling branches. The Wait Days

	node applies to the next activity, default, or sibling branch under the node.
Insert New Child Conditional Set	Creates a parallel communication branch. This branch is a default branch. Any list members who do not qualify for other sibling conditional branches get the communication from this branch.
Add a New Sibling Child Branch	Creates a new sibling conditional branch nested below the parent branch. After creating the sibling conditional branch, you need to select a condition from the Lookup field or create a new condition to establish the criteria used to identify the list member subset that should be included in this branch.
Add New Sibling Branch to This Condition	Creates a new sibling conditional branch nested next to the existing branch. You need to select a condition from the Lookup field or create a new condition to establish the criteria used to identify the list member subset that should be included in this branch.
Set New Parent Branch	Allows you to select an existing activity or branch to set as the parent communication branch. After selecting this option, the available activities and branches to be assigned parent branches are highlighted. Click on the activity or branch to be set as the parent branch to reorder the nodes.
Start New Merge Branch	Allows you to start a new merge branch that you can then use to merge parent activities and branches together.
Merge With Existing Branch	Allows you to merge an activity or branch with an existing merge branch.
Remove From Merge	Allows you to remove an activity or branch from an existing merge branch.
Delete	Allows you to delete an existing activity or branch.

Add a communication activity

You can add activities to communication plans that are in draft mode, or add activities to existing communication plans that are suspended.

About this task

You must select the communication channel when creating an activity. The required fields depend on which communication channel you select.

When configuring the channel activity ownership, you have the option to select Advisor Type, Record Owner, Current User, Other User (where you can select the user who will receive the communication activity), or Team as the activity owner.

Procedure

1. Go to Communications > Communication Plans.
2. Open the communication plan record.
3. Open Plan Editor from the ribbon.
4. On the node where you want to add the activity, click New ().
5. Select Add New Activity. Click OK.
6. In the Subject field, assign the activity a unique title.
7. In the Owner field, leave the default.
8. Enter the date and time processing options.

   Note: The timezone displayed in the drop-down menu reflects the timezone from CRM.

Option	Description
Calendar Plans	Enter a Process Date and then a Process Time. These fields do not appear for triggered communication activities. Note: Activities on separate branches cannot process at the same time.
Dynamic Plans and Relative Wait Plans	a. Enter a Process Time. b. In the Expiration field, select one of the following options: • `Use Plan End Date` - after the plan ends, no further activities will be distributed, even if the person joined late. • `Activity Expiration Date` - allows the activity to be distributed after the plan ends. It could also expire before the plan ends. You must specify an Expiration Date. These fields do not appear for triggered communication activities.

9. Optional: In the Activity Code field, select an existing activity code to associate with the activity, or create a new activity code.
   Selecting this option adds the activity code to the activity records of those included in the member list.

10. Optional: In the Suppress Duplicates field, select whether to suppress duplicate distribution.
    If you select Yes, you must add an activity code.
11. For dynamic plans. In the Failure Processing field, select one of the following options.
    This field does not appear for triggered communication activities.

Option	Description
Ignore and continue	If an activity distribution fails for a particular plan member, the communication plan continues, and the member continues on in the plan.
Reprocess and continue	If an activity distribution fails for a particular member, the distribution is attempted until the processing completes, and the member simultaneously continues on in the plan.
Reprocess until complete	If an activity distribution fails for a particular member, the member is put on hold from continuing in the plan until distribution can be processed.

    Note: Activities with a Failure Processing value of Reprocess and Continue or Reprocess until Complete do not reprocess if the failure is a result of a suppressed activity code or communication preference. Ellucian has determined that the likelihood of the error status changing is very slim. To save processing time, therefore, Advise does not reprocess these errors. For Reprocess until Complete activities, any participants who receive either of these errors continue to the next step of the plan as if they were successful distributions.

12. In the Channel field, select how to distribute the activity.
    You will be required to enter different fields depending on which channel is selected.
13. In the Activity Ownership field, select one of the following options.

Option	Description
Advisor Type	In the Advisor Type field, select the type of advisor. When the communication is distributed, Advise looks for the student's advisor who matches the type. Note: Keep the following in mind: • If Advise finds a match, that person owns the activity. If there are multiple matches, Advise selects the earliest created advisor of that type. If there are no matches, the user in the Owner field owns the communication activity. • Email service and text messaging do not support advisor ownership.

Option	Description
Record Owner	The user in the Owner field owns the communication activity.
Current User	You own the communication activity.
Other User	In the User to Own Activities field, select the applicable user.
Team	In the Team to Own Activities field, select the applicable team.

14. If you are using Salesforce Marketing Cloud (SFMC) as your email service, select one of the following options in the From Email Ownership field:

    Warning! If you did not set up your SFMC account to support other senders, it will not matter which ownership option you select here. It will default to the SFMC Default.

Option	Description
Record Owner	The user in the Owner field of the member being distributed to will be the email sender. Warning! If the record owner does not have an email address, the activity distribution to members will fail.
Current User	The user who created the communication activity will be the email sender. Warning! If the record owner does not have an email address, the activity distribution to members will fail.
Other User	In the User for From Email field, select the applicable user. Warning! If the record owner does not have an email address, the activity distribution to members will fail.
Team	In the Team for From Email field, select the applicable team. The email address set on the team will be the email sender. Warning! If you specify a team that does not have an email address, the activity distribution to the members will fail.
SFMC Default	SFMC will be the email sender.

15. Click the Save icon.

Result

You can now create additional activities and specify wait times between subsequent activities.

Set a wait time between communication activities

You can set a wait time between communication activities to control the number of days between activities. It applies to the activity directly below the Wait Time node.

Procedure

1. From the Command Bar Ribbon, click Plan Editor.
2. Navigate to the communication activity for which you would like to add a wait time, then click New ().
3. Select Set Wait Days.
4. In the Days field, enter the number of days that will make up the wait period.
5. Click OK.
   To edit the wait time, click on the wait node, then set the new wait period of the Days field of the Set Wait Days window.
   To remove a wait time, click on the wait node and set the wait period in the Days field to `0`. Click OK. The wait time activity is removed from the communication plan.

Add conditional branches

You can create parallel communication plans for subsets of members from the same communication plan.

About this task

You can use conditional communication branches to target different students or staff members based on common criteria, which means you are targeting a subset of the plan's list members. Advise uses if/then logic to sort the member lists based on the conditions associated with the sibling branches. For example, you may have a communication list of students based on their specific program (one for math, one for engineering, and one for life sciences).

Note: People can qualify for multiple branches. If that happens, those people will get the communication from each branch that they qualify for. Those who do not qualify for at least one branch will get the default.

Start by creating a default branch using Insert New Child Conditional Set. This branch will be the catch all for anyone who does not meet the sibling branch criteria. Then, create one or more sibling branches using Add New Sibling Branch to This Condition. You can use a condition to specify which subset of list members should be part of the sibling branch.

Note: If you want to add a wait time before members enter a branch, after you create the branch, select the "+" on the node and select the Wait Days option.

Create a default branch

Creating a default branch is how you can set up having different activities for people in the member lists based on conditions.

Procedure

1. From the communication plan record, open the Plan Editor.
2. Click New (), from a node in the communication plan.
3. Select Insert New Child Conditional Set to add a new parallel communication branch and click OK.
4. See the following table. Advise populates all fields except the Set Abbreviation field.

Field	Description or Instruction
Owner	Pre-populated with the owner of the plan.
Plan	Pre-populated with the name of the plan.
Type	Pre-populated with the type of branch, which is "Conditional." You cannot change this field.
Default	Pre-populated with "Yes" to indicate that this branch is the default conditional branch. You cannot change this field. Keep the following in mind: • People who do not meet the condition for a sibling branch fall into this branch • Because this is the default branch, you will never specify a condition on it.
Parent Branch	Pre-populated with the name of the parent branch, which is the branch you were on when you selected Insert New Child Conditional Set.
Set Abbreviation	Enter a short, five-character abbreviation for the branch code. Keep the following in mind: • This abbreviation plus the name of the condition will be the parent branch name for any sibling branches you create. • If you create another child conditional set after this branch, its name will be the abbreviation plus the word "Default." You can create additional child conditional sets if you need more complex branching.

5. Click Save.
   The default branch node appears in the editor. The name of the branch is automatically set to the abbreviation followed by "Default."

Create a sibling branch

You can add sibling branches to the default branch.

About this task

Keep the following in mind:

- A parent branch can only have one child merge branch or one child conditional set.
- A conditional branch can only have one default branch per set of conditions.
- People can qualify for multiple branches. If that happens, those people will get the communication from each branch that they qualify for. Those who do not qualify for at least one branch will get the default.

Procedure

1. From the communication plan record, open the Plan Editor.
2. Click New (+), from the default branch.
3. Select Add New Sibling Branch to this Condition and click OK.
4. See the following table.

Field	Description or Instruction
Owner	Pre-populated with the owner of the plan.
Plan	Pre-populated with the name of the plan.
Type	Pre-populated with the type of branch, which is "Conditional." You cannot change this field.
Default	Select Yes or No. Note: Depending on where you add the sibling branch, this field may be locked with "No." • Yes - means that you actually want to create a default branch and meant to select Insert New Child Conditional Set in the Select an Option screen. • No - means that you want to create a sibling branch. You must also select a Condition. Advise pre-populates and locks the Default Branch, Parent Branch, and Set Abbreviation fields.

Field	Description or Instruction
Condition	Select a condition. Warning! Conditions must be non-aggregate conditions (no conditions that use assessment options).

5. Click Save.
   A new sibling branch node appears in the editor. The name of the branch is automatically set to the abbreviation set on the default branch followed by the condition name.

Add an activity to a plan

You can add an activity to a plan.

Procedure

1. From the communication plan record, open the Plan Editor.
2. Click New , from a trunk, branch, or from another activity.
3. Select Add New Activity and click OK.
4. See the following table.

Field	Description or Instruction
Plan	Pre-populated with the plan name.
Branch	Pre-populated with "Trunk" or the communication branch name, depending on where the activity is placed.
Subject	Enter an activity name.
Owner	Pre-populated with the plan owner.
Process Time	Select the time when this activity should start.
Expiration	Calendar plans - enter a process date in the Process Date. Dynamic plans - select the Expiration option. If you select Use Plan End Date, a member who joins the plan late may not receive this activity. If you select Use Activity expiration date, you must specify the Expiration Date.
Failure Processing	Dynamic plans only. Select one of the following: • Ignore and continue - Skip this activity and move to the next one.

Field	Description or Instruction
	• Reprocess and continue - Continue to try to distribute this activity, but move on to the next one. • Reprocess until complete - Do not move to the next activity until this one is complete.
Channel	Select the applicable communication channel.
Activity Ownership	Select the applicable activity owner. You can select Advisor Type, Record Owner, Current User, Other User (where you can select the user who will receive the communication activity), or Team as the activity owner. Keep in mind that email service and text messaging do not support advisor ownership.

5. If you are using Salesforce Marketing Cloud (SFMC) as your email service, select one of the following options in the From Email Ownership field:

   Warning! If you did not set up your SFMC account to support other senders, it will not matter which ownership option you select here. It will default to the SFMC Default.

Option	Description
Record Owner	The user in the Owner field will be the email sender.
Current User	You will be the email sender.
Other User	Select the applicable user. Warning! If you specify a user who does not have an email address, the SFMC default will be the email sender.
Team	Select the applicable team. Warning! If you specify a team that does not have an email address, the SFMC default will be theemail sender.
SFMC Default	SFMC will be the email sender.

6. In the detail pane, click Save.
   A new activity node appears in the detail under the sibling conditional branch.

Merge conditional branches

You have the option to merge two parallel activity branches together to create an activity that includes all students in the conditional plans' respective member lists. You can merge branches so that everyone receives the same communication again.

Procedure

1. From the Command Bar Ribbon, select Plan Editor.
2. Locate one of the activities or branches that you would like to merge, then click New ().
3. Select Start New Merge Branch.
4. Assign the merge branch a name.
5. Click Save.
   A new merge branch appears in the detail pane.
6. Locate the second activity you would like to merge, and then click New ().
7. Select Merge With Existing Branch.
8. Select the merge branch you created to join the separate branches.
   Any new activities created in the merged branch includes all members of the member list(s) involved in that branch.

Set relative wait days

You can set a wait period relative to the date set in the plan's Relative Date field. You can set the distribution to be a certain number of days before or after the relative date or on the actual relative date.

About this task

- This procedure applies to relative wait plans only.
- The Relative Wait Days option for conditional branches applies to the entire conditional set, even if you select Set Relative Wait Days option on a default branch or sibling branch.
- When you create communication activities and conditional branches in a relative wait plan, Advise sets the relative wait days based on the surrounding nodes. You can then change as needed. For example, if you create a communication activity or conditional branch from an activity or branch that had three days before relative wait, Advise sets the new activity or branch to three days before relative wait as well, which you can change.
- Advise brings in members to the relative wait plan only if they have a date set in the relative wait plan Relative Date field and are part of a communication list. If members are part of the communication list but do not have the date set, Advise does not bring them in to the plan.
- Members who enter the plan with a date after a relative wait do not get the communication activity and move to the relevant branch or communication activity. For example, on October 15, a member enters a plan with a 2-days before communication activity and an actual date

communication activity. If you launch the relative wait plan on October 15, the member does not get the 2-days before communication activity but does get the actual date activity.

Procedure

1. From the Command Bar Ribbon, click Plan Editor.
2. Navigate to the communication activity or conditional branch for which you would like to add relative wait days, then click New ().
3. Select Set Relative Wait Days.
4. Select whether you want the wait time to be before, on, or after the relative date.
5. If you chose before or after, in the Days field, enter the number of days that should make up the wait period.
6. Click OK.
   In the plan editor, above the activity node, either X Days Before, Actual Date, or X Days After appears, X being the number you set in the Days field.

Copy a communication plan

You can create duplicate versions of an existing communication plan to use as templates for additional communication plans.

Procedure

1. Go to Communications > Communication Plans.
2. Select the communication plan record you want to copy.
3. From the navigation bar, click Copy Plan.
   You should receive a message window that reads `The communication plan copy completed successfully.`
4. Click OK.
5. To access and edit the copied communication plan, go back to Communications > Communications Plans. You may need to refresh to see the copied plan.

   The copied plan is named sourcename (Copy #), where sourcename is the name of the original plan, and # indicates the number of copies that have been made.

   The Status Reason field is set to Draft, and the Planned Start Date, Actual Start Date, and End Date fields are all blank. There are not any communication plan log records or communication log detail records created for the copied plan.

   For calendar plans, the Process Date retains the date from the original plan.

   For dynamic plans, if the activity expiration was set on the original activity, the default Expiration Date field setting is “1/1/9999” for the copied plan. Make sure you change this date before you set the copied plan to Ready to Launch.

Add a response to a communication plan

You can add a response to a communication plan.

Procedure

1. Go to Communications > Plan Responses.
2. Click New.
3. In the Information and Received From sections, enter information in all required fields and additional fields as needed.
4. To associate the response with an activity, in the Originating Activity section, in the applicable activity channel field, select the actual activity.

Schedule a communication plan workflow

After creating a communication plan and adding communication activities, you can run workflows to evaluate plan membership before distribution.

Before you begin

To run a communication plan workflow, the record must have a status of `Ready to Launch`. To mark the plan as Ready to Launch, navigate to the communication plan record. Scroll to the Set to Ready to Launch entity in the Information section. In the Status Reason field, select Ready to Launch from the dropdown menu.

About this task

Note: Communication plans are automatically moved to the `Launched` state when the plan is first evaluated. Plans cannot be edited after they are launched. To make edits to a plan that has already launched, navigate to the communication plan record and select Suspended for Edits from the Status Reason field. Resume the plan by selecting Launched after finishing the edits. The plan will continue at the next interval for reevaluation.

Procedure

1. Go to Settings > Workflow Scheduler.
2. Select Add New Schedule.
3. In the Name field, enter `Evaluate Communication Plan`. Leave the Status Reason field as Active.
4. In the Workflow field, select the More Options button (...).
5. Select Evaluate Communication Plans. Click OK.
6. Optional: Select whether to Run As Schedule User.
7. Enter a start and end date.

Note: Ellucian recommends running the workflow hourly.

Result

This newly created workflow record appears in the list of existing workflow schedules. You can start the workflow schedule by navigating to the record you just created, then selecting Start Selected Schedules.

Manually re-evaluate membership in a plan

You have the option to re-evaluate a launched communication plan and its activity distribution list based on changes in the member list.

About this task

If the Re-evaluate Plan Participation configuration is set to `Yes` and the plan is dynamic, the re-evaluation interval is reset after the plan is manually re-evaluated. For example, if the automatic re-evaluation interval is set to Day 5 of the plan, and the plan is manually re-evaluated on Day 3, the plan next re-evaluates on Day 8.

Procedure

1. Open the launched communication plan.
2. From the More Commands bar, click Run Workflow.
3. Select the Re-evaluate Communication Plan workflow.
4. Click Add.
   A Confirm Application of Workflow window appears.
5. Click OK to kickoff the communication workflow.
   After the re-evaluation is complete, the communication plan has a “Plan Re-evaluation” log record. If members were added to or removed from the plan, they appear in the Entered Plan and Exited Plan communication plan log detail records.

   Note: If the communication plan is not in the Launched state, the workflow is cancelled.

View individual activities within a communication plan

You can review details of individual activities that were distributed to those enrolled in member lists.

About this task

- Information about members who entered and finished a plan is available in the communication plan record.

- Information about members who entered a branch of the communication plan and finished that path is available within that specific communication branch.
- Information about members who received communication activities is available within that specific communication plan activity.

Procedure

1. Go to Communications > Communication Plans.
2. Open the communication plan record.
3. From the Command Bar ribbon, click Plan Editor.
4. Click the communication activity node.
5. Click the popout icon in the detail pane to open the communication activity record.
6. Scroll to the Activities sub-grid.
   For example, scroll to either Email Activities or Phone Activities.
7. Click the activity record to view details about the activity.

Communication plan log file management

Because communication plans can contain a high volume of log records, Advise includes a system job that helps to manage the growth of log records.

By default, Advise runs this system job, named Delete Completed Comm Plan Logs Older Than One Month against the following entities, with the following criteria, and on the following cadence. You do not need to take any action to configure this system job because Advise runs it automatically. If you need to modify the system job because you want to retain a communication plan's logs or detail logs, modify the system job to run on a different cadence, or pause the job for a period of time, you can modify the system job accordingly:

- The system job runs against the following entities:
  - Communication Plan Logs
  - Communication Plan Log Details
- The system job uses the following criteria:
  - The Communication Plan Status Reason must be Cancelled or Completed
  - The Communication Plan End Date must be older than one month
- The system job runs on the following frequency:
  - One time upon initial installation or first upgrade to a version that includes this system job
  - After the initial run, every 28 days at 4:30 a.m.

View communication plan logs

You can review processing information and statistics regarding communication plans by reviewing communication plan log and communication plan log detail records.

About this task

Procedure

1. Go to Communications > Communication Plans.
2. Select the communication plan record for which you want to view the log.
3. Scroll to the Communication Plan Logs section.
   Log records containing information about activity distribution, plan reevaluation, and plan suspension and completion appear. You can also view communication plan log records from the Communication Activity form.
4. Open the selected record.
5. Scroll to the Communication Plan Log Details section.
   Log detail records for each member such as plan and branch entry, activity distribution success or failure, and plan completion appear. If activity distribution failed for a user, the log detail record explains why. For example, there is missing data or the record is inactive.

Engagement plans

An engagement plan contains planning tasks and activities that promote communication and interaction with students and other contacts.

Engagement plans can be large-scale communication efforts sent to all students or contacts, or smaller distributions that are targeted to specific groups of students or contacts. All engagement plans share the goals of your institution's overall student success and retention strategy, but some engagement plans also have specific, measurable goals. When implementing an engagement plan, you will:

- Plan and schedule a series of communications.
- Identify the tasks involved in completing those communications.
- Assign those tasks to the appropriate people at your institution.

Each planned communication is an engagement activity, and an engagement plan can have multiple engagement activities.

Each engagement plan is targeted to specific lists of recipients. Most communications in a single engagement plan will be sent to that list. However, you can target certain engagement activities to a subset of those lists. For example, within the same engagement plan, you could send a specific communication to all incoming freshman and another one to students who are also athletes.

Engagement plan communications are usually sent by email or mail, but they can take a variety of other forms, including phone calls or in-person appointments. Engagement plan materials can include any emails, letters, marketing materials, phone scripts, mobile notifications, and messages that are sent out as communications or that are used to gather responses.

The engagement plan process includes:

1. Create the engagement plan goals, activities, schedule, and tasks.
2. Create engagement lists of students or other contacts.
3. Create materials.
4. Send communications.
5. Manage responses.
6. Evaluate progress and results.

At any time during an engagement plan, you can view engagement plan details on the color-coded Engagement Plan Calendar. The Engagement Plan Calendar provides a quick look at upcoming activities, appointments, and events. You can sort the Engagement Plan Calendar by a variety of delivered views, such as by My Engagement Plans, All Engagement Plans and Engagement plan Templates, or Inactive Engagement Plans.

The components for setting up and managing engagement plans include codes, activity templates, activities, engagement lists, and responses.

Related concepts

- Set up and use alert rules

Create an engagement code

An engagement code is used to identify and categorize a type of engagement plan in the system. You can use engagement codes to create additional views or to categorize report results.

Procedure

1. Go to Communications > Engagement Codes.
2. Click New.
3. Enter a name and an engagement code in the provided fields.
4. Click Save.

Related tasks

- Create an engagement plan

Create an engagement list

An engagement list consists of students or other contacts. These might be students or other contacts to whom you want to assign scores or send communications.

About this task

Preconfigured data templates create some of the engagement lists. You can change these engagement lists or create new ones to meet the needs of your institution.

You can use engagement lists in various areas in Advise, such as in alert rules, scoring plans, or engagement plans.

Procedure

1. Go to Communications > Engagement Lists.
2. Click New.
3. Enter information in all required fields and additional fields as needed.

Field	Description
List Type	Select whether you want the members in the engagement list to be Static or Dynamic. If you select Dynamic, the members in the engagement list will change each time you open

Field	Description
	the engagement list or, in the case of drip engagement plans, when you run the "Synchronize Drip Engagement List" workflow. If you select Static, the members in the engagement list will change only when you manually add or remove members from the engagement list. Note: After you create an engagement list, you cannot change the list type. Additionally, you must add members before you can use the list in scoring plans or engagement plans.
Targeted At	Select the entity that contains the records that the engagement list will be comprised of. For example, if you are adding students or if you are selecting other contacts, you would select Person. If you are selecting organizations, you would select Account.
Locked	If you want to prevent other users from adding or removing members from the list, set the Locked field to Yes.

4. Click Save.
5. To add members, click Manage Members.
   If you are adding members to a dynamic engagement list, a custom Advanced Find window is displayed in which you can select the query criteria for the engagement list. If you are adding members to a static engagement list, the Manage Members window is displayed.
6. If you are adding members to a dynamic engagement list, do the following:
   a) Specify the query criteria that you want to define for the engagement list.
      You can specify query criteria for the entity that you selected in the Targeted At field, which in most cases is the People entity.
      For example, if you want to create a dynamic engagement list that contains all freshman students, you could specify Class Level equals "Freshman" (or your institution's equivalent value).
   b) Click Use Query to apply the query criteria to the engagement list.
      The system adds the members who meet the query criteria to the engagement list.

   You can view the members of your dynamic engagement list on the Person Associated View.

   On the navigation bar, click the down arrow next to the engagement list that you created, and click List Members.
7. If you are adding members to a static engagement list, do the following:
   a) Select the method that you want to use to locate members for the engagement list, and then click Continue.

You can locate members using either a Lookup or Advanced Find.

b) If you chose to add members using a Lookup, select the members from the list, click Select, and then click Add.
The system adds the members that you selected to the engagement list.

c) If you chose to add members using an Advanced Find, specify the query criteria to retrieve members for the engagement list, and then click Find.
You can specify query criteria for the entity that you selected in the Look for field, which in most cases is the Person entity.
For example, if you want to create a static engagement list that contains all freshman students, you could specify Class Level equals "Freshman" (or your institution's equivalent value).

d) Select the members from the list or select the Add all the members returned by the search to the engagement list option, and then click Add to Engagement List.
The system adds the members that you selected to the engagement list.

You can view the members of your static engagement list on the Person Associated View. On the navigation bar, click the down arrow next to the engagement list that you created, and click Engagement List Members.

8. Click Save.

Result

You can now use your engagement list in a scoring plan or an engagement plan.

Related concepts

- Advise preconfigured data components

Related tasks

- Create a scoring plan
- Create an engagement plan
- Add an engagement list to an engagement plan
- Add an engagement list to an engagement activity

Create an activity template

An activity template contains all of the information that is needed to generate individual activities. These activities are created when engagement activities that contain the template are automatically distributed.

About this task

You can create activity templates and add them to your engagement activities when you are ready to begin distributing them, or you can create them from within the engagement activity. After you have saved an engagement activity that is set to be distributed automatically with a scheduled start date and an activity template, the engagement activity will be automatically distributed on or after the scheduled start date when the "Distribute Engagement Activity" workflow runs.

Activity templates identify the channel for the activity and provide channel-specific configuration options. You can create activity templates for the following activity channels in engagement activities: letter, fax, phone call, or email. Mail merge activities cannot be automatically distributed. You can also specify offset days and hours for when activities are due, which allows them to also be used in catch-up processing or drip engagement plans.

Procedure

1. Go to Communications > Activity Templates.
2. Click New.
3. Enter a name for the activity template, and then select the channel in the Activity Type field.
4. For all activity types except email, enter a subject and description that identifies the activity.
5. For email activity types only, select the email template to be used in the activity template.
   If needed, click View to view and edit the email template.
   Email templates are a native CRM feature. For more information, see the Microsoft Dynamics 365 Help.
6. Optional: For all activity types, enter the following:

Field	Description
Due Date Days Offset and Due Date Hours Offset	Specify how many days and hours after the alert rule is triggered that the activity is due.
Duration	Specify how long the activity will last.

7. For all activity types, you can set the activity code, priority, category, and sub-category.
8. Click Save.

Related tasks

- Add an activity to an engagement plan
- Automatically distribute engagement activities

Create a mobile notification template

A mobile notification template contains information about a mobile notification that should be sent to students. A mobile notification is sent when the engagement activity that it is added to is automatically distributed, and the appropriate workflow is run.

About this task

A mobile notification template can be used in more than one engagement activity.

Note: To receive mobile notifications, students must download the Ellucian GO app and register their mobile device.

Procedure

1. Go to Communications > Mobile Notification Templates.
2. Click New.
3. Enter information in all required fields and additional fields as needed.

Field	Description
Name	Enter a name for the mobile notification template that will be created in Advise.
Mobile Headline	Enter the headline that will be displayed on the mobile device when the notification is received.
Headline	Enter the headline that will be displayed in the Ellucian GO application.
Activity Code	Enter the associated activity code for the mobile notification. The activity code allows you to categorize the type of activity that the notification is regarding. For example, you could create different activity codes for registration and financial aid activities and apply them to the notification. An activity is created for each student when the notification is created.
Description	Enter a detailed description that will be displayed on the mobile device when the push notification is received.
Destination Label	Enter the label that will be displayed beside the destination URL in the mobile notification. You can provide a destination label and URL in the notification to point students to additional information or a website to complete an action.
Destination URL	Enter the URL that should be displayed in the mobile notification. You can provide a destination label and URL in the notification to point students to additional information or a website to complete an action.
Push Notification	If you want the notification to be pushed to the student's mobile device, select Yes. If you want the notification to be retrieved when the student connects to Ellucian GO, select No. If you select "Yes" and a student is not registered for push notifications, the notification will be retrieved when the student connects to Ellucian GO.
Expiration Offset	Enter the number of days after a notification is sent that it will remain on the Ellucian GO server. If you do not specify a value, the default expiration on the Ellucian GO server is used.

4. Click Save.

Result

When the engagement activity is automatically distributed, the associated mobile notifications are created as activities for students.

Related tasks

- Add an activity to an engagement plan
- Automatically distribute engagement activities

Create an engagement plan

An engagement plan can be based on preconfigured templates, or you can create a new engagement plan to meet the needs of your institution.

Before you begin

Before you can begin, you must have created your engagement plan codes.

Procedure

1. Go to Communications > Manage Engagement Plans.
2. Click New.
3. Enter information in all required fields and additional fields as needed.

Field	Description
Engagement Plan Color	Select the color that will be used to identify the engagement plan in the Engagement Plan Calendar, when it is supported in Advise. Use Lookup to search for a color.

4. Click Save.

Result

You can now add activities, engagement lists, and responses to your engagement plan.

Related concepts

- Advise preconfigured data components
- Engagement plan features

Related tasks

- Create an engagement code
- Add an activity to an engagement plan
- Add an engagement list to an engagement plan
- Add a response to an engagement plan

Create a message template

A message template contains information about a message that should be sent to students. A text message is sent when the engagement activity that it is added to is automatically distributed, and the appropriate workflow is run.

About this task

Keep the following in mind.

- You can use a message template in more than one engagement activity.
- Do not specify a member type for Engagement Plans message templates. Engagement Plans do not support personalization.
- To receive a text message, students must have a mobile number and be willing to receive text messages from the sender. Students can opt out of text messages by sending a STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, OR QUIT MESSAGE. They can opt back in with START or YES.

Procedure

1. Go to Communications > Message Templates.
2. Click New.
3. Enter information in all required fields and additional fields as needed.

Field	Description
Message Body	Enter the text message. Advise allows you to enter a total of 1,600 characters in a text message which includes 1400 characters in the message body and 200 characters in the Twilio footer. Note: If the message body exceeds 160 characters, it will be broken into segments. Segments can be up to 160

Field	Description
	characters. When the message is sent, Twilio will attempt to send the segments in order at the rate of one segment per second.
Image URL	You can optionally include a picture in your message, such as a logo, by including a URL link to the image. Note: Sending images will only work to United States and Canadian mobile numbers.
Activity Code	Enter the associated activity code for the messages. The activity code allows you to categorize the type of activity that the message is regarding. For example, you could create different activity codes for registration and financial aid activities and apply them to the message. An activity is created for each student when the message is created.

4. Click Save.

What to do next

When the engagement activity is automatically distributed, the associated text messages are created as activities for students. When the system runs the Send Message workflow, it sends all pending messages to students through Twilio. When Twilio sends the message, it will send back a status to Advise. Messages that have been sent successfully will be marked Complete. If there was an error, the error status will appear. You can open the message details to see the error message so you can resolve it and send the message.

Related tasks

- Add an activity to an engagement plan
- Automatically distribute engagement activities

Add an activity to an engagement plan

An engagement activity is a single communication in an engagement plan. For each engagement activity, you can also identify drip engagement plan, automatic distribution, catch-up processing, and engagement list filtering details.

Before you begin

Before you begin, you must have an engagement plan defined. You must also do the following, depending on your engagement activity configuration:

- If you are creating engagement activities for drip engagement plans, the Workflow Scheduler must be configured to run the "Synchronize Drip Engagement List" workflow to synchronize engagement lists for drip engagement activities.
- If you are enabling catch-up processing of the engagement activities, the Workflow Scheduler must be configured to run the "Catchup Engagement Activity" workflow.
- If you are automatically distributing engagement plans, the Workflow Scheduler must be configured to run the "Distribute Engagement Activity" workflow against one or more engagement activity views. If you are automatically distributing engagement activities, you should set the scheduled start dates on the activities only when you are ready to distribute them. After you have saved an engagement activity that is set to be distributed automatically, the engagement activity will be automatically distributed on or after the scheduled start date when the "Distribute Engagement Activity" workflow runs.

Procedure

1. Go to Communications > Manage Engagement Plans.
2. Open the engagement plan to which you want to add an engagement activity.
3. Under the Engagement Activities section, click Add Engagement Activity record ➕.
4. Enter information in all required fields and additional fields as needed.

Field	Description
Channel	Select the channel that corresponds to the activity you want to add. If you are adding a message or mobile notification activity, select Other. Note: You must select a channel that supports automatic distribution of engagement activities for the Automatic Distribution section to be displayed.
Subject	Create a subject that uniquely identifies this activity for your engagement plan.
Scheduled Start	Enter the scheduled start date for the engagement activity. If this is an initiating activity in a drip engagement plan, you must enter a scheduled start date. If this is a drip activity in a drip engagement plan, the scheduled start date will be filled in automatically.

Field	Description
Anti-Spam Setting	Use this section to enter the number of days for which members of an engagement list are excluded from the engagement activity if they have been contacted.

Note: The owner of the activity will default to the current user. This does not need to be the same person you identify in the Activity Ownership setting that will own the distributed activity.

5. Under the Drip tab, enter information in the fields as needed.

Field	Description
Drip Activity	If this is a drip activity in a drip engagement plan, select Yes. If this is an initiating activity in a drip engagement plan, select No.
Initiating Activity	If this is a drip activity, enter the initiating activity. Use Lookup to search for the record.
Offset	Enter the number of days after the initiating activity that you want to perform the drip activity.

Note: You cannot enable catch-up processing for drip activities in a drip engagement plan. Advise automatically calculates the scheduled start dates and catch-up processing for drip activities from the offset number entered for the drip activity and the scheduled start date or catch-up settings of the initiating activity.

6. In the Automatic Distribution section, enter information in the fields as needed.

Field	Description
Distribute Automatically	If you want Advise to automatically distribute the engagement activity for you, select Yes, and complete the fields that appear as described below.
Activity Ownership	Optionally, you can select the owner of the activity. If you select Advisor Type, User, or Team, you must then also specify the advisor type, user, or team in the additional field that is displayed. The Advisor Type option allows you to specify any type of advisor that is defined by your institution. For example, if your institution assigns a primary advisor to each student with an advisor type of "Academic," you can assign the "Academic" advisor type to the activity so that the student's academic advisor is assigned the activity when it is generated. If more than one user record for an advisor type is available, the first user record for that advisor type is assigned the activity.

Field	Description
	Note: If a student does not have an advisor of that type, the engagement activity will be assigned to the record owner. Unless you have changed it, the record owner will be the person who initially provisioned the student's record. Note: While an advisor type can own a text message or mobile notifications, the actual sender will be the record owner, because of the way engagement plans are structured. This means that text messages and mobile notifications will appear to the student as coming from the record owner.
Attach Activity to Queue	Optionally, select the queue to which you want to attach the activities that are generated by the automatic distribution.
Send Email and Close Activity	(For "Email" channels only). Select Yes if you want to have Advise automatically send the email activities and close them after sending. Otherwise, leave this field set to No and the email activities will need to be closed manually. Note: If you choose not to automatically send emails when an engagement activity is generated, you must either send emails manually or schedule the "Send Email" workflow to send emails.
Template	(For all channels except "Other"). Select the activity template that will be used to create the individual activities that are distributed. The activity template contains the information that will appear in the individual activity when it is distributed. You must select an activity template that matches the engagement activity channel. You can also create a new activity template from within the engagement activity.
Other Distribution Option	(For "Other" channels only). If you selected the "Other" channel option, select either Mobile Notification or Send Message, and then select the template that will be used when the engagement activity is distributed.

7. In the Catch Up section, enter information in the fields as needed.

Field	Description
Enabled	Select Yes to enable catch-up processing.
Frequency	Enter, in days, how often the catch-up processing should occur.
Expires	Enter the last date on which catch-up processing should occur. Note: When you are entering your frequency and expiration date, make sure that you do not have extra days where processing will not occur and therefore people will be missed. For example, if you enter a frequency of 5 and your expiration date is set to 18 days after your distribution, some people might be missed on the last 3 days.

Note: Make sure that your catch-up processing is not scheduled to occur past the time that your engagement plan ends.

8. Click Save.
9. If you want to filter out individuals from this engagement activity distribution, complete steps 10 through 13. Otherwise, skip to step 14.
10. In the Filter Target Engagement Lists section, select one of the following options:

Option	Description
By Previous Communication with Activity Codes	This option allows you to filter out individuals who have received a specific previous communication based on the activity code of that communication. You can enter more than one excluded activity code if needed. To do this, under the section name, click Add Engagement Activity Excluded Activity Code record +.
By Previous Communication with Subject Lines	This option allows you to filter out individuals who have received a specific previous communication based on the subject line of that communication. You can enter more than one excluded subject line if needed. To do this, under the section name, click Add Engagement Activity Excluded Subject Line record +.

11. In the new window, do one of the following, depending on the option you selected in the previous step:

- If you are defining an excluded activity code, in the Excluded Code field, perform a Lookup to locate an already defined activity code that you want to exclude, or click New to create a new activity code. You can locate any activity code already in the system.
- If you are defining an excluded subject line, in the Excluded Subject field, perform a Lookup to locate an already defined excluded subject line, or click New to create a new excluded subject line.
  Advise cannot link to the subject lines in the system; therefore, you must create the subject lines that you want to exclude from this window. The excluded subject line that you enter here must exactly match the subject line of the previous communication to be filtered correctly.

12. Click Save, and then close the appropriate record to return to the Engagement Activity record.

    Note: When the excluded items have been added, distribution of the engagement activity is disabled until the filtering workflow has been run. You must run the filtering workflow before manually distributing the engagement activity. If you are automatically distributing the engagement activity, filtering is done automatically before distributing the engagement activity.

13. If you are using mail merge engagement activities, follow these steps to manually distribute engagement activities:

    Note: If you are automatically distributing engagement activities, you do not have to perform this step. You should automatically distribute engagement activities unless you are using mail merge engagement activities, which do not support automatic distribution.

    a) Click More Commands ..., and then click Run Workflow.
    b) Select the "Filter Engagement Activity Lists" workflow, and then click Add.
    c) Click OK.

    This workflow creates new static engagement lists from the original engagement list for distribution based on the member type (student or organization). You cannot distribute engagement activities while the workflow is running.

    Note: If you run the filtering workflow against an engagement activity that has existing filtered engagement lists, the original engagement list (not the existing lists) will be filtered according to the criteria and new filtered engagement lists will be created.

    To locate the original engagement list, open Advanced Find. In the Look for field, select Engagement Lists as the entity. Then, select Parent Engagement Lists (Parent) as the related entity. Specify the following search criteria: select Parent List, select Equals, and then perform a Lookup to select the filtered engagement list for which you want to locate the original engagement list. Click Results to display the original engagement list.

14. Click Save.

What to do next

If you do not specify automatic distribution options or you are using mail merge engagement activities, then you must manually distribute engagement activities after you have created them. Distributing an engagement activity assigns the activity to the specified owners, creates an activity for each contact in the engagement list, and performs the activity automatically if possible.

Related concepts

- Advise workflows schedule guidelines
- Engagement plan features

Related tasks

- Create an engagement plan
- Create drip engagement plans
- Automatically distribute engagement activities
- Create an activity template
- Create a mobile notification template
- Create a workflow schedule
- Create a message template

Add an engagement list to an engagement plan

You can add an engagement list to an engagement plan and optionally to its undistributed engagement activities.

Before you begin

Before you begin, you must have an engagement plan defined.

About this task

Note: You cannot add engagement lists to engagement activities that already have been distributed. If you want to perform the activity for the new engagement list, you must create another activity and distribute it to the new engagement list.

Procedure

1. Go to Communications > Manage Engagement Plans.
2. Open the engagement plan to which you want to add an engagement list.
3. Under the Engagement Lists section, click Add Engagement List record ➕.
4. In the Look Up Records window, select the name of the engagement list, and click Select. Repeat this step as needed to select additional engagement lists.
   You can also create a new engagement list if needed by clicking New.
5. Click Add.
6. In the Confirm Addition window, select whether to add the engagement list to only the engagement plan or also to the undistributed engagement activities, and then click Add.

   Note: If you are not planning on adding separate engagement lists to the engagement activities, you should select the option to add the engagement lists to both.

7. Click Save.

Related tasks

- Create an engagement plan
- Create an engagement list
- Add an engagement list to an engagement activity

Add an engagement list to an engagement activity

You can specify one or more engagement lists for an engagement activity to target that activity to specific lists of recipients.

Before you begin

Before you begin, you must have an engagement activity defined.

About this task

Note: You cannot add engagement lists to engagement activities that already have been distributed. If you want to perform the activity for the new engagement list, you must create another activity and distribute it to the new engagement list.

Procedure

1. Go to Communications > Engagement Activities.
2. Open the engagement activity to which you want to add an engagement list.
3. Under the Engagement Lists section, click Add Engagement List record +.
4. In the Look Up Records window, select the name of the engagement list, and click Select. Repeat this step as needed to select additional engagement lists.
5. Click Add.
6. Click Save.

Related tasks

- Create an engagement list
- Add an engagement list to an engagement plan

Add a response to an engagement plan

You can record information about a response that you received for an engagement activity from a student or other contact.

Before you begin

Before you begin, you must have an engagement plan and engagement activity defined.

Procedure

1. Go to Communications > Manage Engagement Plans.
2. Open the engagement plan to which you want to add a response.
3. On the navigation bar, click the down arrow to the right of the engagement plan, and click Engagement Responses.
   The Engagement Response Associated View is displayed.
4. Click Add New Engagement Response.
5. Enter information in all required fields and additional fields as needed.

Field	Description
Customer	If the response is for a student or organization in the system, enter the student or organization name in this field. You can use Lookup to select a student name. If the response is for a student who does not exist in the system, you can enter that student's information in the Last Name, First Name, Phone, and Email fields to capture the information without creating a new record.
Response Code	Select an option from the list that reflects the type of response given.
Channel	Select the channel from which you received the response. For example, this can be a phone call or an email.
Received On	By default, the system enters today's date as the received on date. You can change this date to the date that the engagement plan response was received.

6. Click Save.

Related tasks

- Create an engagement plan

Close individual activities within an engagement plan

Individual activities can be closed manually or in bulk from within an engagement plan. The following activity types can be closed in bulk: appointment, email, fax, letter, phone call, and task.

About this task

When an engagement activity is distributed, individual activities are created for each member of the target engagement lists associated with the engagement activity. In widely distributed engagement plans, this can result in thousands of individual activities. It is important to mark all activities complete so that they do not become past due or because they are no longer needed. If you have a small number of activities, you or the activity owner can do this manually. If you have a large number of activities, you can close them in bulk.

The following activity types can be closed in bulk. When the activities are closed, the following statuses are assigned depending on the type of activity:

- Appointment: "Completed"
- Email: "Completed"
- Fax: "Completed"
- Letter: "Sent"
- Phone Call: "Made"
- Task: "Completed"
- Message: "Sent"
- Mobile Notification: "Completed"

Note: If you close a recurring appointment, the selected appointment will be closed but not the remaining appointments in the series.

Procedure

1. Go to Communications > Engagement Activities.
2. Open the engagement activity for which you want to close individual activities.
3. Under the Activities section, you can do one of the following:
   - To close a specific activity, open the activity record, and click Mark Complete.
   - To close activities in bulk, click Close All Activities. All activities will be closed.

What to do next

For engagement plans, when all individual activities are closed, you can close the main engagement activity. To do this, open the engagement activity from the same area, click More Commands ..., and then click Close Engagement Activity.

Allow Advise to send emails to students on your behalf

Some alerts and engagement plans can send an email to your students on your behalf.

About this task

Your institution creates emails on your behalf to personalize outreach to students who need additional assistance and give them a point of contact. You must allow Advise to send these automated emails.

Note: The following setting displays only if your administrator turned on email integration with Advise.

Procedure

1. From the navigation bar on the right, click Settings ⚙.
2. Click Options.
3. Select the Email tab.
4. Verify that Allow other Microsoft Dynamics CRM users to send email on your behalf is selected.
5. Click OK.

View engagement plan communication history

You can view communication history for a specific engagement plan and search for specific communications.

Procedure

1. Go to Communications > Manage Engagement Plans.
2. Open the engagement plan for which you want to view the communication history.
3. Click More Commands ..., and then click Communications.
4. In the Engagement Plan History window, select People or Accounts to see the communications for a group of individuals, such as students or organizations.
   You can expand any of the sections in the results to see a list of communications that were sent.
5. To view only the communications for a specific individual or organization, enter a name or email address in the Search field to locate the person or organization record.

Engagement plan features

The following features can help you when designing and implementing your engagement plans.

Related concepts

- Advise solution customization

Related tasks

- Create an engagement plan
- Add an activity to an engagement plan

Filtering of engagement lists when creating activities

Before distributing an engagement activity, you can filter out individuals from your targeted engagement lists who have already received a specific previous communication.

When filtering by previous communications, you can identify the activity codes or subjects for the engagement activities that you want to use as filtering criteria. If an individual in a targeted engagement list for the engagement activity meets any of the filtering criteria, that person's record will be excluded when the activity is distributed.

If you are manually distributing engagement activities, you must run the "Filter Engagement Activity Lists" workflow on demand after you identify the filtering criteria and before you distribute the engagement activity. This workflow creates new static engagement lists from the original engagement list for distribution based on the member type (student or organization). You cannot distribute engagement activities while the workflow is running.

If you are automatically distributing engagement activities, you do not have to run the workflow after you identify the engagement list filtering criteria in the engagement activity. Filtering is done automatically before distributing the engagement activity.

Catch-up processing

Catch-up processing on engagement activities allows you to complete the activity for any members that are added to the engagement list that is associated with the activity after the activity has been distributed.

For example, if you have an activity to send a student a "welcome" email and you have catch-up processing enabled, when new students are added to the engagement list, catch-up processing can create additional engagement activities so that you can send the email to the new students.

You can enable catch-up processing options when you add engagement activities to engagement plans and define the schedule upon which the engagement activity is processed. Catch-up processing occurs by using the "Catchup Engagement Activity" workflow that runs on a view of engagement activities. Ellucian recommends that you set up a workflow schedule to run this workflow against the delivered "Catchup Eligible Activities" view. Each time an engagement activity is processed by the workflow, the Last Processed field is updated with the date the workflow ran, and any necessary catch-up actions are created automatically.

Note: You cannot enable catch-up processing for drip activities in a drip engagement plan. Advise automatically calculates the scheduled start dates and catch-up processing for drip activities from the offset number entered for the drip activity and the scheduled start date or catch-up settings of the initiating activity.

Drip engagement plans

Drip engagement plans are a type of engagement plan that allow you to schedule the distribution of engagement activities with specific offset numbers.

For example, you can send an email on day 1 of the drip engagement plan, send an information packet on day 5, make a phone call on day 14, and send a follow-up email on day 15.

Drip engagement plans have an initiating activity and one or more subsequent activities, called drip activities. Each drip engagement plan has an initiating activity to which the engagement list and all drip activities are assigned. Each drip activity contains an offset number, which specifies the number of days after the initiating activity that the drip activity should be performed.

You can enable catch-up processing on an initiating activity, but you cannot enable catch-up processing for drip activities in a drip engagement plan. If catch-up processing is defined on the initiating activity, Advise will automatically create the corresponding drip activities, and set the scheduled start date based on the offset. Drip engagement activities are displayed on the Engagement Plan Calendar, along with any catch-up activities for the drip engagement plan.

You can use either a static or dynamic engagement list for drip engagement plans. The engagement lists that are assigned to the initiating activity are used for all associated drip activities in the engagement plan. If members are added or removed from an engagement list during the engagement plan, Advise can manage the changes to your engagement list and assign the appropriate catch-up activities. You can enable catch-up processing by using the "Catchup Engagement Activity" workflow that runs on a view of engagement activities. You can remove engagement list members by using the "Synchronize Drip Engagement List" workflow, which synchronizes the engagement list with the engagement activities.

Create drip engagement plans

Drip engagement plans are a type of engagement plan that allow you to schedule the distribution of engagement activities in a specified time frame.

Procedure

1. To ensure that members who are added to an engagement list during a drip engagement plan can receive activities that were already distributed, you must create catch-up processing on the initiating activity, and run the "Catchup Engagement Activity" workflow.

   Note: You should use the "Catchup Eligible Activities" view when setting up your workflow schedule. Catch-up activities will only be run as often as the workflow is run. For example, you should not schedule the workflow to be run one time a week if you want catch-up activities to be run more often.

2. To ensure that members who are removed from an engagement list that is assigned to a distributed initiating activity are also removed from its undistributed drip activities, you must

run the "Synchronize Drip Engagement List" workflow. This workflow synchronizes the engagement list for the drip activities with the engagement list for the initiating activity in the drip engagement plan.

Note: You should use the "Drip Synchronize Eligible Engagement List" view when setting up your workflow schedule.

3. Ellucian recommends that you run each workflow automatically by creating a schedule using the Workflow Scheduler. You can also run the workflows manually after the initiating activity has been distributed.
4. Create an engagement plan.
5. Add engagement activities to your engagement plan, and specify the options for the drip activities.
   You can also set up options to automatically distribute engagement activities for the following channels: letter, fax, phone call, or email. Mail merge activities cannot be automatically generated and, therefore, will need to be manually distributed.

   Note: You can enable catch-up processing on an initiating activity, but you cannot enable catch-up processing for drip activities in a drip engagement plan. If catch-up processing is defined on the initiating activity, Advise will automatically create the corresponding drip activities and set the scheduled start date based on the offset number.

6. Assign an engagement list to the initiating activity in the drip engagement plan.
7. If you did not specify automatic distribution options or you are using mail merge engagement activities, then you must manually distribute engagement activities in the drip engagement plan, as noted in the Engagement Plan Calendar.

   Note: After the initiating activity in a drip engagement plan has been distributed and has a "Completed" status, a static version of the original engagement list that was assigned to the initiating activity is created for each entity type and is assigned to the drip activities. For example, if you have Accounts, People, and Leads assigned to the initiating activity, a new static engagement list will be created for each of these entities and assigned to the drip activities. All drip activities in the drip engagement plan will use the same static engagement lists. By doing this, Advise can manage the engagement list members for each drip activity and retain a master engagement list. If members are added or removed, the static engagement lists for the drip activities will change as necessary, when you run the associated workflows.

   Note: If a drip activity is distributed before the initiating activity, it will be changed to a non-drip engagement activity.

Related concepts

- Advise workflows schedule guidelines
- Engagement plan features

Related tasks

- Create an engagement plan
- Add an activity to an engagement plan
- Automatically distribute engagement activities
- Add an engagement list to an engagement activity

Automatic distribution of engagement activities

Engagement activities must be distributed after they are created. You can do this automatically.

Distributing an engagement activity assigns the activity to the specified owners, creates an activity for each student or other contact in the engagement list, and performs the activity automatically if possible. You can set up options to automatically distribute engagement activities for the following channels: letter, fax, phone call, or email. Mail merge activities cannot be automatically generated. This feature works in conjunction with catch-up processing and drip engagement plans.

To automatically distribute engagement activities, you must create activity templates. Activity templates contain all of the information that is needed to generate the individual activities that are created during distribution. You can create the activity templates before you start your engagement plan, and add them to your engagement activities when you are ready to begin distributing them. After you have saved an engagement activity that is set to be distributed automatically with a scheduled start date and an activity, mobile notification, or message template, the engagement activity will be automatically distributed on or after the scheduled start date when the "Distribute Engagement Activity" workflow runs. Automatic distribution of activities occurs by scheduling the "Distribute Engagement Activity" workflow to run against one or more engagement activity views.

You can also map custom fields for automatic distribution. When automatically distributing engagement activities, Advise will first copy the fields on the activity template to the fields on the created activity. If you have custom fields that you want to include in this process, you can map those fields from the activity template to the entity for the corresponding activity type. On the Activity Template entity, 1:N relationships exist with "Referential" behavior. To create a custom field mapping, in your unmanaged solution, you can add a custom field of the same type and format to the Activity Template entity and then map it to the corresponding field on the appropriate activity type entity.

Automatically distribute engagement activities

You can follow this process to set up engagement activities to be automatically distributed.

Procedure

1. Configure the Workflow Scheduler to automatically distribute engagement activities.
   You must schedule the "Distribute Engagement Activity" workflow against one or more engagement activity views. For example, if you want to distribute all of the current day's engagement activities, you can use the "Pending Automatic Distribution Activities" view when setting up your workflow schedule. This view will pull all engagement activities with a status of "Proposed" that are added to engagement plans with a status of "Ready to Launch." Likewise, if you want to distribute engagement activities differently by channel, you can set up custom views for each channel and use them when setting up your workflow schedule.

   Note: For optimum results, you should make sure that all catch-up and drip engagement plan processing is complete before running the automatic distribution process. To do this, Ellucian recommends that you run the "Catchup Engagement Activity" and "Synchronize Drip Engagement List" workflows first, and then run the "Distribute Engagement Activity" workflow after those processes are complete.

   Note: You should not run the "Distribute Engagement Activity" workflow on demand. It should always be set up to run automatically on a schedule using the Workflow Scheduler.

2. Create activity, message, or mobile notification templates.
3. Create an engagement plan.
4. Add engagement activities to your engagement plan, and specify the automatic distribution options.
5. Add an engagement list to the engagement plan and undistributed activities, or add it to only the engagement activities.

Related concepts

- Advise workflows schedule guidelines
- Engagement plan features

Related tasks

- Create an activity template
- Create a mobile notification template
- Create an engagement plan
- Add an activity to an engagement plan
- Add an engagement list to an engagement plan
- Add an engagement list to an engagement activity
- Create a message template

Events

Maintain information about events and the people and organizations who participate in the events.

Maintain information about events and the people who participate in the events.

Advise includes two mechanisms for managing events.

- Eventbrite Events - You can use the power of Eventbrite to manage your events, register constituents, and then import the event information from Eventbrite to Advise. The process of importing event information from Eventbrite uses a direct point-to-point integration, which you can automate through a workflow, and run on a specified cadence. Events managed through Eventbrite accommodate event registration fees and multiple ticket types per event. You can display Eventbrite events through the constituent experience, and when a user registers for an Eventbrite event, the constituent experience directs the user to Eventbrite.
- Eventbrite Events - You can use the power of Eventbrite to manage your events, register constituents, and then import the event information from Eventbrite to Advise. The process of importing event information from Eventbrite uses a direct point-to-point integration, which you can automate through a workflow, and run on a specified cadence. Events managed through Eventbrite accommodate event registration fees and multiple ticket types per event. You can display Eventbrite events through the constituent experience.
- CRM Events - You can use the power of Advise to create, maintain, and manage your events. You can display CRM Events through the constituent experience and allow constituents to view and register for events. You can also use Advise to manually manage CRM Events. Because CRM Events are completely managed in Advise, you do not have to import event information from Eventbrite. CRM Events limits event registration fees to a single fee per event.
- CRM Events - You can use the power of Advise to create and manage your events. You can display CRM Events through the constituent experience and allow students to view and register for events. You can also use Advise to manually manage CRM Events. Because CRM Events are completely managed in Advise, you do not have to import event information from Eventbrite.

Eventbrite events

You can integrate Eventbrite events with Advise when you want to use Eventbrite to enter and maintain your event and event-related information.

You can use the power of Eventbrite to manage your events, register constituents, and then import the event information from Eventbrite to Advise. The process of importing event information from Eventbrite uses a direct point-to-point integration, which you can automate through a Advise workflow, and run on a specified cadence. Events managed through Eventbrite accommodate event registration fees and multiple ticket types per event. You can display Eventbrite events through the constituent experience, and when a user registers for an Eventbrite event, the constituent experience directs the user to Eventbrite.

Before you use Eventbrite events, you must configure the Event Management settings.

View the details of an Eventbrite event

View the details of an Eventbrite event and examine its high-level information.

Procedure

1. Go to Advancement > Events.
2. In the drop-down list of views, select Active Eventbrite Events.
3. On the Event form, view the details of the event.

   After you import an event from Eventbrite to Advise, you can use Advise to manually add participants to the event. For example, VIP guests. However, you can only maintain values in certain event fields. For example, you can modify the values in the Event Type, Time Zone, College, Department, Division, and constituent experience fields. You can modify these values because Eventbrite does not capture the values or because you need to review and modify the values after the import process completes. If you need to change event details that originated in Eventbrite, you must modify those details in Eventbrite, and then run the import process to import the changes to Advise.

   Additionally, when you import an event Eventbrite, the Notes section appears blank because the import process does not import notes or comments. After you import an event, you can manually add notes and comments to the Notes section. From that point forward, the notes and comments information that you added manually displays in the Notes section.

Eventbrite event fields

Eventbrite event fields help to define an Eventbrite event.

The list does not include fields that are self-explanatory.

Unless explicitly noted otherwise, fields on this form are display only.

Field	Description
Name	The unique name that identifies the event. If you display the event through the constituent experience, this name displays to constituents in the constituent experience.
Event Status	The status of the event. If an event contains a status other than Open, the event does not appear in the constituent experience. Eventbrite events and CRM Events share the values in this field. The status that displays in Eventbrite is not the same status that displays in Advise. When you run the Get Eventbrite Events workflow, the status in Eventbrite is translated to the applicable status in Advise as noted below. This occurs to facilitate reporting needs across Eventbrite events and CRM Events.

Field	Description	
	Eventbrite status code	CRM Events status code
	Draft	Draft
	Live	Open
	Started	Open
	Ended	Closed
	Completed	Complete
	Canceled	Canceled
Event Type	The type of event. For example, Alumni Event, Athletics Event, or Fundraising Event. If you display the event in the constituent experience, you must enter a value in this field. You can modify this value. This value displays to users through the constituent experience and users can use this value to search for events.	
Event Location	The location of the event. If the event does not have a location because it does not occur at a physical location, and you do not want to display the event in the constituent experience, you can select a value of No Location. If the event is an online event, Ellucian recommends that you use the Online Event field instead of selecting a value of No Location. If the event that you imported from Eventbrite does not have a location, the value No Location appears. Advise also creates a Task that informs you the import could not find a matching location. If you set the value in the Display in Constituent Experience field to Yes to display the event in the constituent experience, you must change the value from No Location to a different value. If the event that you imported from Eventbrite has multiple matching locations, the import process selects the first match.	
Online Event	Indicates whether the event occurs online or at a physical location.	
Start Date	The date and time that the event begins.	
End Date	The date and time that the event ends.	
Time Zone	The time zone in which the event occurs. When the Get Eventbrite Events workflow imports an event, it maps the time zone value to a Microsoft Dynamics 365 equivalent. After you run the workflow, you must confirm that the time zone is correct. If it is not correct, you must adjust the value accordingly.	
Purpose	The purpose of the event.	

Field	Description
Eventbrite Type	The type of Eventbrite event. Eventbrite uses this value when users search for public events in Eventbrite.
Internal Description	An internal description of the event. When you import event information from Eventbrite, the import copies the event's description in Eventbrite to this field and the Search Description field. If you display the event on the constituent experience, this information does not display to constituents students through the constituent experience.
Total Event Participants	The total number of participants for the event. Advise updates this number when you run the Get Eventbrite Events workflow to update event participant records. If you use Advise to manually add an event participant to an event, this number will not reflect the participant because the event originated in Eventbrite. If you want this number to reflect all participants, Ellucian recommends that you use Eventbrite to add the participant information and then import it to Advise.
Total Participants Accepted	The total number of participants who confirmed that they will attend the event. The Registration Status field on the event participant record must be set to Confirmed for the workflow to include a participant in this count. Advise updates this number when you run the Get Eventbrite Events workflow to update event participant records. If you use Advise to manually add an event participant to an event, this number will not reflect the participant because the event originated in Eventbrite. If you want this number to reflect all participants, Ellucian recommends that you use Eventbrite to add the participant information and then import it to Advise.
Total Participants Declined	The total number of participants who will not attend the event. The Registration Status field on the event participant record must be set to Canceled for the workflow to include a participant in this count. Advise updates this number when you run the Get Eventbrite Events workflow to update event participant records. If you use Advise to manually add an event participant to an event, this number will not reflect the participant because the event originated in Eventbrite. If you want this number to reflect all participants, Ellucian recommends that you use Eventbrite to add the participant information and then import it to Advise.
Total Participants Attended	The total number of participants who attended the event. The Attended field on the event participant record must be set to Yes for the workflow to include a participant in this count.

Field	Description
	Advise updates this number when you run the Get Eventbrite Events workflow to update event participant records. If you use Advise to manually add an event participant to an event, this number will not reflect the participant because the event originated in Eventbrite. If you want this number to reflect all participants, Ellucian recommends that you use Eventbrite to add the participant information and then import it to Advise.
Capacity	The total number of attendees that the event can accommodate.
College	The name of the college that has an association with the event.
Department	The name of the department that has an association with the event.
Division	The name of the division that has an association with the event.
Organizer Name	The name of the person or organization who organized or planned the event.
Organizer Description	Description of the person or organizer who organized or planned the event.
Organizer URL	URL for the person or organization who planned the event.
Event Rating	The rating given to a completed event to indicate its overall performance. For example, indicate whether the event was Successful or Unsuccessful.
Display in Constituent Experience	Indicates whether you want to display the event in the constituent experience. • Yes = You want to display the event in the constituent experience. The constituent experience displays the event when you select this value, the event's status is Open, and the Event Location is not set to No Location. • No (default) = You do not want to display the event on the constituent experience. For example, you can select this value for a private event or if you want to use Eventbrite to display the event instead of displaying the event through the constituent experience. Tip: If you select this value, you can use the URL in the Event URL field to preview an event without displaying it to all constituents. Note: If the Show in Search field on the Event Type validation list for the event's type is set to No, the event does not display when a constituent uses the constituent experience to search for the event, regardless of the value in this field. You can use the Show in Search field if you want to send the event's URL to specific individuals to inform them about the event. Tip: You can select this value to hide a specific event from your constituents, and then send the event's URL, in the Event URL field, to a specific person or a targeted group

Field	Description
	of people. You can also create a list of filtered events that includes this event. After you create the list of filtered events and a direct link to the event, you can distribute the URL to a targeted list of private guests. Because the private guests have a direct link to the event, they can use the constituent experience to view the details of the event, and depending on the event's settings, register for the event. And because other constituents do not have a direct link to the event, they cannot view the event's details or register for the event.
Event URL	The URL for the event. Tip: If you want to communicate with a select group of people or organizations and notify them about an event, you can send them the URL in this field, which provides direct access to the event's details.
Search Description	The description that you want to display to users of the constituent experience. This description displays in the Search Results under the name of the event, as noted in the Event Name field. When you import Eventbrite events to Advise, the import process copies the event's description from Eventbrite to this field and the Internal Description field. After the initial import, Advise does not update the value in this field and you can modify it as necessary.

View a list of participants for an Eventbrite event

View a list of people or organizations who have an association with an Eventbrite event.

About this task

An event participant record identifies the person's or organization's participation in the event. For example, the event participant record can identify whether the person or organization attended the event.

Procedure

1. Go to Advancement > Events.
2. In the drop-down list of views, select Active Eventbrite Events.
3. In the list, open the event that contains the participants list that you want to view.
4. In the Event Participants section, view the participants list.

   Alternatively, click See the records associated with this view  to open the associated view and open the record.
5. Optional: If you want to view additional event participation information, open the event participant record to view its details.

View the details of an Eventbrite event participant

View the high-level information for a person's or organization's Eventbrite event participation, including the participant's biographic information, address, and event-related details.

Procedure

1. Go to Advancement > Events.
2. In the drop-down list of views, select Active Eventbrite Events.
3. In the list, open the event that contains the event participant whose details you want to view.
4. In the Event Participants section, open the event participant record that you want to view.

   Alternatively, click See the records associated with this view to open the associated view and open the record.
5. On the Event Participant form, view the event participant's details.
   - If you used Advise to manually create the event participant, you can modify the details of the event participant.
   - If you imported the event participant from Eventbrite, you cannot maintain the event participant's information. Advise displays all fields on the form in display only because you can only maintain the values in Eventbrite. If you need to change any of the details of an event participant that originated in Eventbrite, you must modify the details of the event participant in Eventbrite, and then run the import process to import the changes to Advise.
     Although you cannot modify any of the details for the event participant, by design, you can modify the person or organization in the Person and Organization field in the Related Record section, respectively. Advise allows you to modify the name of the person or organization because you might need to perform some cleanup after you import the event participant information. Additionally, you do not need to specify a person or organization for an event participant record and you can have an event participant that is not linked to a person or organization.
     The value in the Enable Person Creation for Unmatched Event Participants check box on the Event Management Configuration settings page controls whether Advise creates new records when it cannot match a participant to an existing person in Advise.
     - If the check box in the setting is selected, and a person participated in an event, and the import process could not locate the person during the import, it does not associate a person with the participant record. Conversely, if Advise found multiple matches for the person and it could not determine which record was correct, it does not create the association. When an event participant record does not contain a value in the Person field, you can use the event participant's information to locate the correct person.
     - If the Enable Person Creation for Unmatched Event Participants check box on the Event Management Configuration settings page is cleared, because you do not want Advise to create new person records, you can manually create a new person record and associate it with the event participant record.
6. Optional: If you want to view the details for a custom question, in the Custom Question section, open the custom question record that you want to view.
   - If you used Advise to manually create the event participant and its custom questions, you can modify the details of the custom question.

- If you imported the event participant from Eventbrite, you cannot maintain the custom question for the event participant. Detail information on the Event Custom Question form appears as inquiry-only, including the name in the Event Participant field, because you cannot reassign a custom question from an event participant to a different event participant. As a result, if you add a new Custom Question to an event that originated in Eventbrite, the next time you view the custom question, it appears as inquiry-only. When you run the import process to import event and participant information to Advise, it brings Questions and Sub-Questions from Eventbrite to Advise and groups all of the separate and standalone Questions and Sub-Questions together. As a result, all questions for an event participant appear in the Custom Question section. Advise does not differentiate between Questions and Sub-Questions.

View a list of Eventbrite events for a person or organization

View a person's or organization's profile and examine an events list for which the person or organization has an event participation record.

Procedure

1. Open the person's or organization's profile.
2. On the Related Data tab, click Events.
3. In the Event Participation section, view the event participation records list.

   Alternatively, click See the records associated with this view to open the associated view and open the record.

Eventbrite event creation

You cannot use Advise to create an Eventbrite event. You must use Eventbrite to create an event and then import it to Advise.

After you import an Eventbrite event to Advise, you can use Advise to add participants to the event.

Add a participant to an Eventbrite event

Add a participant to an Eventbrite event and indicate the person's or organization's participation in the event.

About this task

You can add a participant to an event you imported from Eventbrite.

Procedure

1. Go to Advancement > Events.
2. In the drop-down list of views, select Active Eventbrite Events.

3. In the list, open the event that you want to add a participant.
4. In the Event Participants section, click Add Event Participant record ➕.
5. On the Event Participant form, in the Related Record section, in the Person or Organization field, enter the name of the person or organization participant, respectively.
   You can enter a name in either the Person or Organization field because the two fields are mutually exclusive. When you enter a name in one of the fields, Advise removes the other field.

   If you do not enter a name in one of the two fields because a Advise record does not exist for the participant, you can use the Summary, Address, and Guest Participants sections to enter the participant's information. If you use these sections instead of the Person or Organization field, at the minimum, you must enter a value in the Last Name field.
6. Enter information in all required fields and additional fields as needed.
   When you manually add a participant to an event, Advise does not add the person's or organization's address information in the address sections. You must manually add this information.
7. Click Save.
   Advise saves the event participant record and enables the Guest Participants and Custom Questions sections.
8. Optional: In the Guest Participants section, click Add Event Participant record ➕, and then add the guest participant information.
   When you add a guest participant, Advise displays the name of the parent participant in the Parent Participant field on the guest participant's record.
9. Optional: If you asked the participant a question to enhance the participant's experience at the event, in the Custom Questions section, enter a custom question to indicate the question and the participant's response.
   For example, add a custom question to indicate whether you inquired about dietary restrictions, food allergies, or medical considerations.
   a) In the Custom Questions section, click See the records associated with this view to open the Event Custom Question view.
   b) On the Event Custom Question view, click Add New Event Custom Question.
   c) On the Event Custom Questions form, in the Question ID field, enter the ID that identifies the question.
      When you import event and participant information, Advise automatically assigns the Question ID. When you manually add a Custom Question, you must manually enter the value. If the Custom Question already exists, and you want to use the same Question ID for consistency, you can use Advanced Find to search for Event Custom Questions and locate the ID for the question. If the custom question does not exist, or if you do not know what ID to enter, refer to your institution's policies and procedures.
   d) Enter information in all required fields and additional fields as needed.
   e) Click Save.
   f) If you asked the participant multiple questions, repeat step 9 for each question.

Result

When you use Advise to add a participant to an Eventbrite event, Advise automatically calculates the counts in the display-only fields in the Event Totals section.

Eventbrite event participant associations

When you import Eventbrite information, depending on your settings, the import might use the participant's name, email, and date of birth and associate the correct person or organization with the event participation record. If the import process locates the person, it associates the person or organization with the event participant record.

The value in the Enable Person Creation for Unmatched Event Participants check box on the Event Management Configuration settings page controls whether Advise creates new records when it cannot match a participant to an existing person in Advise.

- If the check box in the setting is selected, and a person participated in an event, and the import process could not locate the person during the import, it does not associate a person with the participant record. Conversely, if Advise found multiple matches for the person and it could not determine which record was correct, it does not create the association. When an event participant record does not contain a value in the Person field, you can use the event participant's information to locate the correct person.
- If the Enable Person Creation for Unmatched Event Participants check box on the Event Management Configuration settings page is cleared, because you do not want Advise to create new person records, you can manually create a new person record and associate it with the event participant record.

If a constituent who registers for an event also registers guests, Advise links that constituent to their guests as the parent participant so that you can identify them as the event registrant. The Event Participants section on the Eventbrite Event form includes a link to the parent participant for each guest participant. The Eventbrite Event Participant form of a parent participant also includes a Guest Participants section. Advise evaluates guest participants to see if they can be linked to an existing person or organization or if there is enough information to create a person or organization record. If no names were provided for those guests in Eventbrite because the Eventbrite order form is set to Buyer Only, Advise does not link them to a person or organization. The event participant name is the parent participant's name and a (+N). For Example, `John Doe (+1,) John Doe (+2).`

Associate a person or organization with an event participant record

Associate a person or organization with an event participant record when you import participant information and the import process cannot link a person or organization to an event participant record.

About this task

If a constituent who registers for an event also registers guests, Advise links that constituent to their guests as the parent participant so that you can identify them as the event registrant. The

Event Participants section on the Eventbrite Event form includes a link to the parent participant for each guest participant. The Eventbrite Event Participant form of a parent participant also includes a Guest Participants section. Advise evaluates guest participants to see if they can be linked to an existing person or organization or if there is enough information to create a person or organization record. If no names were provided for those guests in Eventbrite because the Eventbrite order form is set to Buyer Only, Advise does not link them to a person or organization. The event participant name is the parent participant's name and a (+N). For Example, `John Doe (+1,) John Doe (+2).`

Because Eventbrite is the authoritative source of the event participant record, you cannot modify many of the values on the event participant form. If you need to modify the event participant record of an event that originated in Eventbrite, and the field is display only in Advise, you must make the change in Eventbrite, and then use the Get Eventbrite Events workflow to import the changes to Advise.

Procedure

1. Go to Advancement > Events.
2. In the drop-down list of views, select Active Eventbrite Events.
3. In the list, open the event that contains the list of participants.
4. In the Event Participants section, view the list of participants.

   Alternatively, click See the records associated with this view to open the associated view and open the record.
5. If an event participant in the list does not have a name in either the Person or Organization field, add the person or organization to the event participation record.
   a) Open the event participant record.
   b) Review the participant information and make note of the participant's name.
   c) Use the information that you gathered in step 5.b to locate the correct person or organization, and make note of the person's or organization's ID number. If you cannot locate the person or organization because the person or organization does not exist in Advise, you can create a new record for the person or organization.
   d) In the Person or Organization field, enter the ID for the person or organization that you noted or created in step 5.c.
   e) Click Save.
   f) Repeat this task for each event participant who does not have a name in the Person or Organization field.

Delete an Eventbrite event

Delete an Eventbrite event when you want to remove the event.

About this task

If you want to delete or cancel an open Eventbrite event from Advise, you must use Eventbrite to delete or cancel the event. You can only use Advise to delete an Eventbrite event when the event has a status of Draft. If you use Eventbrite to delete or cancel an open event, the next time you import the event to Advise, the process sets the status of the event in Advise to Canceled.

Warning! If you delete a draft event in Advise, and you do not delete a draft event in Eventbrite, the next time that you run the import process, the process adds the draft event that you deleted from Advise back to Advise. Conversely, if you only delete a draft event in Eventbrite, the import process does not acknowledge the deletion because the import process cannot track information that does not exist. Consequently, the import process does not notify Advise of the deletion or delete the draft event from Advise. Under these circumstances, the draft event remains in Advise, and the two systems have a data discrepancy.

Because of the potential to inadvertently create an inconsistency in the data, Ellucian does not recommend that you delete an event from either system. Instead, you should update the event status in Eventbrite to reflect a deleted or canceled status. When you change the status in Eventbrite to reflect a deleted or canceled status, the import process tracks the change and Advise retains an audit of the status change.

If you manually created a draft event in Advise, or if you created the event by accident, you can delete the draft event.

Procedure

1. Go to Advancement > Events.
2. In the drop-down list of views, select Active Eventbrite Events.
3. In the list, open the draft event that you want to delete.
4. On the Event form, review the event details and verify that you want to delete the event.
5. On the command bar, click Delete .
6. On the Confirm Deletion dialog box, click Delete.

   Warning! When you delete a draft event, Advise automatically deletes all of the participant records for the draft event, and all of the custom questions for each event participant.

Import event information from Eventbrite

Import event and participant information from Eventbrite to Advise when you use Eventbrite to capture event and participant information.

About this task

If you established a workflow schedule to run the Get Eventbrite Events workflow on a specified cadence, the workflow scheduler runs the workflow at the specified interval. You can run the workflow outside of the specified cadence or to complete additional tasks that Advise could not complete during the import process.

Procedure

1. Use the Workflow Scheduler to create a workflow schedule for the Get Eventbrite Events workflow.
2.
3. Select the workflow schedule that you created in step 1, and then click Run Selected Schedules.
   Advise creates the event, event participant, and custom question information. If Advise locates the person during the import process, it associates the event participant record with the appropriate person in Advise, and depending on your system's settings, it uses the information from Eventbrite to create or update the person's address, phone, email, and business relationship information. If Advise cannot locate the person during the import process, Advise creates a record for the person along with the applicable address, phone, email, and business relationship information that the person provided in Eventbrite.

   If you previously imported an event from Eventbrite, and you subsequently use Eventbrite to cancel an event, when you run the workflow to re-import your event information to Advise, the import process cancels the event in Advise. If an authenticated constituent experience user registered for an event and you subsequently cancel the event, when the constituent views the My Events page, the constituent experience displays information that tells the constituent the event and registration were canceled. If you need to remove an event from Eventbrite, Ellucian recommends that you cancel the event instead of deleting it.

   Warning! Advise does not create organizations or related records for organizations during the import process. If the event participant record belongs to an organization, and Advise cannot match the information to a person or organization, and the Enable Person Creation for Unmatched Event Participants setting is enabled, Advise creates a new person. If the event does not have a name in Eventbrite, Advise does not import the event and its participants. Instead, Advise logs an error in the log file.

4. Perform the applicable tasks that Advise could not complete during the import process.
   Under certain circumstances, Advise cannot complete all of the required import tasks. When this occurs, you must perform certain tasks after you run the workflow in step 3. For example, the import process does not provide you with the opportunity to change all address associations for each person who share the same address association. Instead, the import process updates the address association for the person linked to the event participation, and then it adds a Task for you to manually update the other address association records.

   By default, when Advise creates an event-related task, it notifies the user or team specified in the Integration Mapping Rule that contains a Type of Notification.

   a) On the navigation bar, click Advanced Find.
   b) In the Advanced Find dialog box, in the Look for field, select Tasks.
   c) Click Results.
   d) In the list, open the record for the task that you want to view.
   e) Review the data to which the task applies.
   f) Open the record to which the task applies, and then update the record as necessary.
      Under certain circumstances, Advise creates a task, and after you review the information in the task, you might determine that you do not have to complete the task. Because

situations vary from institution-to-institution and from record-to-record, Ellucian strongly encourages each institution to review the task list after each import to ensure that every task receives equal consideration.

5. Perform the applicable validations that Advise could not complete during the import process.
   a) Open the record for the event that you want to review.
   b) In the Event Location field, enter a value and specify the location of the event.
      - If the imported event does not have a location, the value No Location appears. Advise also creates a Task that informs you the import could not find a matching location. Because the import process uses the value of No Location for events that do not have a location, you cannot delete or modify the value of No Location in the Event Location validation list. Event owners should periodically check the duplicate detection results to ensure Advise contains up-to-date Event Location validation values.
      - If the imported event has exactly one matching location, the import uses that location.
      - If the imported event has multiple matching locations, the import process selects the first matching location based on the duplicate detection rule for the event service location. This behavior occurs because Advise includes duplicate detection rules that help to prevent duplicate event location values. When Advise uses the first matched location, you can use the Event Location field on the Event form to modify the value if necessary.

      Note: If you have events that you imported with previous releases of Advise, you should review those events in Advise to determine whether they contain a location value. If you see a blank location value, you should update the value accordingly.
   c) In the Time Zone field, validate the value is correct.
      When the Get Eventbrite Events workflow imports an event, it maps the time zone value to a Microsoft Dynamics 365 equivalent. You must confirm that the time zone is correct and adjust the value accordingly if it is not correct.
6. Optional: In you want to display the event in the constituent experience, configure the event for use with the constituent experience.
   a) In the Event Type field, enter a value to specify the type of event.
      For example, Alumni Event, Athletics Event, or Fundraising Event.
   b) In the Constituent Experience section, in the Display in Constituent Experience field, select Yes.
   c) In the Constituent Experience section, in the Search Description field, enter a meaningful value.
      In the constituent experience, this description displays in the Search Results under the name of the event, as noted in the Event Name field.
   d) In the Event Location field, enter a value and specify the location of the event.

If the event does not have a location, the value No Location appears. You must change the value from No Location to a different value.

If the event that you imported from Eventbrite has multiple matching locations, the import process selects the first matching address.

What to do next

If Eventbrite is configured to use the Buyer Only form, and Advise could not associate an event participant record with a person because there were multiple possible matches or there was not enough information, you can review the event participant records for the event and manually associate a person or organization with an event.

Imported related records

Advise creates or updates information for event participants when you run the Get Eventbrite Events workflow to import event and event participation records.

When Advise imports an event and its event participants, it attempts to associate each event participant with a person record in Advise. If Advise locates the person, it examines the information in Eventbrite and your Event Management Configuration settings to determine whether it should update the person's biographic information in Advise with the information from Eventbrite. When applicable, Advise updates the person's record accordingly.

If the Enable Person Creation for Unmatched Event Participants check box on the Event Management Configuration settings page is selected, and Advise cannot locate a record for the person, and it has enough information from Eventbrite, it uses the Eventbrite information to create a new person record and link the new person to the event participant record.

Advise imports the following types of records noted below.

Person information

When Advise is configured to create new person records, it uses the following information and links it to the event participant.

Related Record	Imported Values
Constituent Affiliation	• Primary = Yes • Person Type = Constituent
Person	• Preferred Method of Contact = Any • Status = Default value from the Status validation list • Date of Birth = From the date of birth information received from Eventbrite. Advise only uses valid date information.
Person Names	From the name components that Advise received from Eventbrite.

Related Record	Imported Values
Formatted Names	From the name components that Advise received from Eventbrite.

If there is a failure during the import process for any of the aforementioned records, Advise creates and inactivates the person's record in CRM, logs an error that there was a failure in assigning the values, and removes the link between the event participant and the new person's record. If this occurs, you should correct the issues with the new person's record, and then re-import the event and event participant data. For example, if your institution requires the entry of Class and College values when you create a Constituent Affiliation record with a Person Type of Constituent, when Advise creates the Constituent Affiliation record, those values do not exist because they are not part of the import from Eventbrite. As a result, Advise does not create the Constituent Affiliation record, which Advise requires for each person. If this occurs, you can manually correct the issue with the person's record, modify the event settings or Constituent Type, and then re-import the event data, which triggers the import process to match the participant record with an existing person record. Before you re-import the event data, you must reactivate the person's record in Advise to properly associate the event participant's record with the person's record. Failure to reactivate the person's record prevents Advise from finding a match, and instead of updating the person's record, it creates another new person record. After you activate the record and resolve the issue, when you re-import the event information, Advise proceeds and create the address, phone, email, and business relationship records for the person.

If you re-import event participants that are linked to a person record, Advise does not update the person's Primary Constituent Affiliation, Preferred Method of Contact, Person Status, or Source information. Advise updates the person's Date of Birth information.

Duplicate detection rules help to identify and prevent the creation of duplicate records:

1. First, Advise looks for an exact match on the Full Name (First Name, Last Name) and an exact match on the Email Address to an organization. If Advise finds an exact match on both criteria, it uses that organization for the event participant record. Advise does not create new organization records during this process.
2. Second, Advise looks for an exact match on the Full Name (First Name, Last Name) and an exact match on the Email Address to a person. If Advise finds an exact match on both criteria, it uses that person for the event participant record. If Advise cannot find an exact match on the Full Name (First Name, Last Name) and Email Address, it looks for an exact match on Full Name (First Name, Last Name) and exact Date of Birth. If Advise finds an exact match on both criteria, it uses that person for the event participant record, and it does not create a new person.
3. If Advise cannot find an exact match on either set of criteria, Advise creates a new person record because the person does not exist.

Address information

Advise creates new address information for the new person record with the following information.

Related Record	Imported Values
Home, Business, and Shipping Address	• Type = Advise examines the values in the Event Home Address Type, Event Business Address Type, and Event Shipping Address Type fields on the Event Management Configuration Settings

Related Record	Imported Values
	page to determine which types you want to associate with new address records. • Status = Default value from the Address Default field in the Status validation list • Preferred = If an address in Advise is preferred, and you import a new address of same type, Advise sets the Preferred indicator on the newly imported address to Yes and the Preferred indicator on the previous address of the same type to No. Advise also sets the Address status of the previous address to the former address default status, as noted in the Former Address Default field in the Status validation list. If the event participant does not have any address information, and multiple address records of different types exist in the import data for the event participant (for example, home, business and shipping addresses), Advise sets the preferred indicator to Yes for the first address that it encounters, and for all other addresses, Advise sets the preferred indicator to No. When the current preferred record contains a historical status, Advise does not move the preferred indicator to the new record, even if it is of the same type. • Change Source = When the import process updates an existing address record, Advise updates this value. For example, when the value in the Preferred field changes.

When you use the Address form to manually add a new address for a person, if multiple people also have an association with the same address, Advise allows you to indicate whether you want to change the address association for all people at the address. For example, when a family moves to a new home. Because the import process does not provide you with the same opportunity to change all address associations for each person who share an address association simultaneously, Advise updates the address association for the person linked to the event participation, and creates a Task for you to manually update the other address association records. The Task indicates that Advise could not update address associations for the address and that you should review and update the address associations as necessary.

When you use the Address form to add a new address for a person, if the person has multiple addresses of the same type, Advise allows you to indicate whether you want to change the status of the existing addresses and change them to a historical status. Because the import process does not provide you with the same opportunity to change the status of previous addresses, when multiple addresses of same type exist, and one of those addresses is preferred, when you add a new address of that type with the import, Advise sets the Preferred indicator on the new address of that type to Yes. Conversely, if a person has multiple home addresses of the same type, but their business address is preferred, if the import adds a new home address for the person, the import process does not make the new home address the preferred address. Additionally, Advise does not change the Address Status on any of the previous addresses to a historical status. This occurs when Advise cannot determine which address status to update because there are multiple records. Instead, Advise creates a Task for you to review the person's addresses and manually update the status information. The Task indicates that Advise could not update the address records for the person because more than one current address of the same type exists and that you should review and update the address associations as necessary.

If an address, whose status changes to a historical status during the import process, contains a Contact Preference, Advise creates a Task that indicates a contact preference exists for the address and that you should review and update the Contact Preference information accordingly. Advise does not create a Task when a Contact Preference exists for the Preferred address because Advise automatically associates the Contact Preference with the new preferred address.

Duplicate detection rules help to identify and prevent the creation of duplicate address records:

- When a current record and current association already exist for the event participant, Advise does not add a new association or address.
- When the address exists, and it is current, but is not linked to the person or organization, Advise creates the association.
- When Advise locates multiple current duplicate address, Advise does not create a new address or association. Instead, Advise enters an error in the log file.
- When Advise locates a duplicate record, but it contains a historical status, Advise creates a new current record for address.
- Advise evaluates the following address fields during the duplicate check: Street1 (same first ten characters), Street2 (same first ten characters), City, and State. Advise does not evaluate inactive addresses.
- Advise does not move the preferred indicator if the import process locates a duplicate, and the duplicate is not currently the preferred address.

Phone information

Advise creates new phone information for the new person record with the following information.

Related Record	Imported Values
Home, Business, and Mobile Phone	From the home, business, and mobile phone information received from Eventbrite. • Type = Advise examines the values in the Event Home Phone Type, Event Business Phone Type, and Event Mobile Phone Type fields on the Event Management Configuration Settings page to determine which types you want to associate with new phone records. • Status = Default value from the Phone Default field in the Status validation list • Preferred = If multiple phone records exist in Eventbrite, the first phone record that Advise encounters during the import process has the preferred indicator set to Yes. All other phone records have the preferred indicator set to No. • International Number = No • Messages Allowed = No • Unlisted = No

Duplicate detection rules help to identify and prevent the creation of duplicate phone records. However, the phone number is a string, and the duplicate check includes separators between the digits. If your phone information does not include separators, and you re-import phone information for event participants, you can inadvertently create duplicate phone records. If this occurs, you can review and, if applicable, manually update the phone records after you complete the import. When you re-import phone information for a person or organization who has an association with an event participant record, Advise examines the person's or organization's Phone Type and Phone Number to determine whether the phone number is a duplicate to prevent the creation of a duplicate record.

Business relationship information

Advise creates new business relationship information for the new person record with the information listed below.

Note: The import process uses employment information in Eventbrite to create Employment Relationships in Advise. The import process does not include business-to-business relationships, and the import process does not create Personal Relationships.

Warning! The import process only creates a business relationship when a person uses the Eventbrite source and enters the name of the organization to which the employment record applies. If Advise cannot find the organization, Advise creates a Task record to inform you that you must take action to manually complete the process. The Task indicates that Advise could not create a business relationship because it could not find the organization.

Related Record	Imported Values
Business Relationship	• Relationship Status = Default value from the Business Relationship Default field in the Status validation list • Relationship Type = From the value in the Event Business Relationship Type field on the Event Management Configuration Settings page. • Primary Employer = Yes • Self Employed = No • Organization Address – When a current, preferred address record exists for the organization, Advise defaults it into the business relationship, copies the address to the person as a business address, and sets the Preferred indicator to No. – When no current, preferred address exists for the organization, Advise does not default any address into the business relationship, and Advise does not copy any address to the person record. – Advise does not former any existing business address records for the person. • Business Addresses When applicable, Advise:

Related Record	Imported Values
	– Increases the Employee Relationship and Total Employee Relationships counts for the organization. – Creates an association for the person to the organization's address. – Sets the Relationship Category based on the Relationship Type.

Duplicate detection rules help to identify and prevent the creation of duplicate business relationship records. When you re-import business relationship information for a person who has an association with an event participant record, Advise examines the person's existing business relationship (person, organization, and relationship type combinations) to determine whether the business relationship is a duplicate to prevent the creation of a duplicate record.

Email information

Advise creates new email information for the new person record with the following information.

Related Record	Imported Values
Email	From the email information received from Eventbrite. • Type = From the value in the Event Email Type field on the Event Management Configuration Settings page. • Status = Default value from the Email Default field in the Status validation list • Preferred = If multiple email addresses exist in Eventbrite, the first email address that Advise encounters during the import process have the preferred indicator set to Yes. All other email addresses have the preferred indicator set to No.

Duplicate detection rules help to identify and prevent the creation of duplicate email records. When you re-import email information for a person who has an association with an event participant record, Advise examines the person's email type and email address to determine whether the email address is a duplicate.

Eventbrite events

Advise provides the ability to import and track events, and event participants, from Eventbrite.

Events imported from Eventbrite are managed separately from events created in Advise. Because Eventbrite is the authoritative source for these events, you cannot create Eventbrite events within Advise, but you can make changes to select fields on the imported events. For example, Event Location, Event Rating, Event Type, and Time Zone.

When importing event information, the participant registrations also import into Advise. If the person registering for the event exists in the system, the Event Service Participant record is associated with their Person record. If the person does not exist, a Person record is created with the information provided by Eventbrite on the order form. In addition to the person's basic information, custom questions and the event participant's answers entered in Eventbrite are also imported as part of the event participant record.

Events imported from Eventbrite do not display on the constituent experience, but you can view the event registration link in Eventbrite after you import the records.

To access all Event Service related entities, you must have Event Approver, Event Service Manager, or Event Service User security roles assigned to you.

Configure Eventbrite in Advise

You must enter the authorization token from Eventbrite to import events.

Before you begin

You must create an Eventbrite account and create an API key to generate the authorization token to use for integration with Eventbrite.

Procedure

1. Go to Settings > Settings Home.
2. Click Event Configuration.
3. In the Eventbrite Authorization Token field, enter the Private token from Eventbrite.

   Note: If each user at your institution has a unique token, you can enter a specific user's token, perform all of the necessary tasks, and then run the Get Eventbrite Events workflow. Next, you can enter a different user's token and repeat the process. If your institution has one token, you can enter the institution's token.

4. In the Eventbrite Historical Event Tracking Span field, enter the number of days and define the span for which Advise includes historical event information in the import.

   For example, if you enter a value of `35`, when you run the import, Advise includes historical event participation records between the date on which you ran the import and the previous `35` days. To determine whether an event falls within this range, Advise examines the date on which the event was last updated, not the date on which the event ended. If an event has an update date that precedes `35` days before the current date, when you run the import, Advise does not include the historical event participation records in the import.

   You should set this value based on the frequency on which you import records. For example, if you import records only every two months, you can set this value to `65` to cover the span between the current date and the preceding two months.

   You can override the default value.

   Tip: If you do not enter any value, the process imports all current and historical records. If you have historical event information, and you implement events with Advise, you can remove the value to import all of your current and historical event information. After the initial import of all current and historical records, you can reset this value based on the frequency on which you import historical records from that point forward.

Warning! Ellucian does not recommend that you enter a value of zero or a negative value. If you enter a negative value, the import process looks for an update date that occurs in the future, and it does not find any records.

5. Optional: Add a value to the Manage Event Locations, Manage Event Ratings, and Manage Event Types validation list so that the users can select these values during data entry and maintenance.

   Note: When you run the Get Eventbrite Events workflow, it imports the Event Locations and Eventbrite Types value from Eventbrite but it does not set the Event Service Types and Event Service Types value as they are not part of the Get Eventbrite Events. You can set these value manually after the events are imported.

   a) In the list, select the validation list to which you want to add a new value.
   b) Click New.
   c) Enter information in all required fields and additional fields as needed.
   d) Click Save & close.
      Repeat the steps for each item that you are adding to the validation list.
6. Click Save.

Create events in Eventbrite

You must create events in Eventbrite that can then be imported into Advise for tracking and linking to people in the system.

See the documentation provided by Eventbrite for more information about creating events using their platform.

Create a scheduled workflow to import events created in Eventbrite

You must create a scheduled workflow to import both new and updated events and event participants from Eventbrite.

Procedure

1. Go to Settings > Workflow Scheduler.
2. Click Add New Schedule.
3. In the Name field, enter a workflow schedule name.
4. In the Workflow field, use the lookup to select Get Eventbrite Events workflow.
   In the Select Criteria dialog box, you may need to select All Processes in the View field.
5. Click OK.
6. In the Workflow Schedule section, set the workflow schedule start and end date along with the interval Advise should run the workflow within the date range.
   If you are using the triggered communication plans using the Event Participant Service member type, Ellucian recommends scheduling the workflow to run multiple times a day to

import new event registrants so that they can enter the communication plan and receive the triggered communication plan activities.

Note: If you previously imported an event from Eventbrite, and you subsequently use Eventbrite to cancel or delete an event, when you run the workflow to re-import your event information to Advise, the import process cancels the event in Advise. If you need to remove an event from Eventbrite, Ellucian recommends that you cancel the event instead of deleting it.

7. Click Save.
8. Select the workflow schedule that you created in step 1, and then click Start Selected Schedules.

View events imported from Eventbrite

You can view the events that have been imported from Eventbrite.

About this task

Advise displays basic information about each imported event, such as dates, name, organizer, status, and attendance numbers. The following views are delivered for imported events.

- Active Events
- Events by Organizer
- Inactive Events
- Recent Events (Last 60 days)
- Recent Events (Last 7 days)
- Upcoming Events (Next 30 days)

Procedure

Go to Travel & Events > View Events.

View the details of an event imported from Eventbrite

You can view additional information about each event that was imported from Eventbrite.

About this task

The event details include basic information about the event, attendance totals, and registered participants.

Procedure

1. Go to Travel & Events > View Events.
2. Open an event.
3. In the Event Type field, enter a value to specify the type of event.

For example, Campus Tour, Open House, or Orientation.

4. In the Time Zone field, validate the value is correct.
   When the Get Eventbrite Events workflow imports an event, it maps the time zone value to a Microsoft Dynamics 365 equivalent. You must confirm that the time zone is correct and adjust the value accordingly if it is incorrect.
5. Optional: If the imported event does not have a location, the value No Location appears. Advise also creates a task that informs you the import could not find a matching location. Because the import process uses the No Location value for events that do not have a location, you cannot delete or modify the value of No Location in the Event Location validation list. Event owners should periodically check the duplicate detection results to ensure Advise contains up-to-date Event Location validation values.
6. Optional: If the imported event has multiple matching locations, the import process selects the first matching location based on the duplicate detection rule for the event service location. This behavior occurs because Advise includes duplicate detection rules that help to prevent duplicate event location values. When Advise uses the first matched location, you can use the Event Location field on the Event form to modify the value if necessary.

   Note: If you have Eventbrite events that were imported in a previous version of Advise, the upgrade process migrated the existing events with their location values. You should review any existing events in Advise to verify whether they have a location specified. If an event does not have a location, you should update the event location accordingly.

Eventbrite event fields

Eventbrite event fields define an Eventbrite event.

The list does not include fields that are self-explanatory.

Unless explicitly noted otherwise, fields on this form are display only.

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td>Name</td><td colspan="2">Unique event name.</td></tr>
<tr><td rowspan="8">Event Status</td><td colspan="2">The status that displays in Eventbrite is not the same status that displays in Advise for the Event Service Events. When you run the Get Eventbrite Events workflow, the status in Eventbrite is translated to the applicable status in Advise as noted below:</td></tr>
<tr><td>Eventbrite status code</td><td>Advise status code</td></tr>
<tr><td>Draft</td><td>Draft</td></tr>
<tr><td>Live</td><td>Open</td></tr>
<tr><td>Started</td><td>Open</td></tr>
<tr><td>Ended</td><td>Closed</td></tr>
<tr><td>Completed</td><td>Complete</td></tr>
<tr><td>Canceled</td><td>Canceled</td></tr>
<tr><td>Event Type</td><td colspan="2">For example, Campus Tour, Open House, or Orientation.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Event Location</td><td>If the event does not have a physical location, you can select a value of No Location. If the event is an online event, Ellucian recommends that you create an Online Event location record instead of selecting a No Location value.

If the event that you imported from Eventbrite does not have a location, the value No Location appears. Advise also creates a Task that informs you the import could not find a matching location.

If the event that you imported from Eventbrite has multiple matching locations, the import process selects the first match.</td></tr>
<tr><td>Online Event</td><td>Indicates whether the event occurs online.</td></tr>
<tr><td>Start Date</td><td>The date and time that the event begins.</td></tr>
<tr><td>End Date</td><td>The date and time that the event ends.</td></tr>
<tr><td>Time Zone</td><td>The time zone in which the event occurs.

When the Get Eventbrite Events workflow imports an event, it maps the time zone value to a Microsoft Dynamics 365 equivalent. After you run the workflow, you must confirm that the time zone is correct. If it is not correct, you must adjust the value accordingly.</td></tr>
<tr><td>Purpose</td><td>The purpose of the event.</td></tr>
<tr><td>Eventbrite Type</td><td>The type of event as identified in Eventbrite.

Eventbrite uses this value when users search for public events in Eventbrite.</td></tr>
<tr><td>Internal Description</td><td>An internal description of the event.</td></tr>
<tr><td>Total Event Participants</td><td>The total number of participants for the event.</td></tr>
<tr><td>Total Participants Accepted</td><td>The total number of participants who confirmed that they will attend the event. The Registration Status field on the event participant record must be set to Confirmed for the workflow to include a participant in this count.</td></tr>
<tr><td>Total Participants Declined</td><td>The total number of participants who will not attend the event. The Registration Status field on the event participant record must be set to Canceled for the workflow to include a participant in this count. The registration status that displays in Eventbrite is not the same registration status that displays in Advise. When you run the Get Eventbrite Events workflow, the registration status in Eventbrite is translated to the applicable registration status in Advise as noted below:
<table>
<tr><td>Eventbrite Registration Status code</td><td>Advise Registration Status code</td></tr>
<tr><td>Opted Out - True</td><td>Canceled</td></tr>
<tr><td>Opted Out - False</td><td>Confirmed</td></tr>
</table></td></tr>
</table>

Field	Description
Total Participants Attended	The total number of participants who attended the event. The Attended field on the event participant record must be set to Yes for the workflow to include a participant in this count.
Organizer Name	The name of the person or organization who organized or planned the event.
Organizer Description	Description of the person or organizer who organized or planned the event.
Organizer URL	URL for the person or organization who planned the event.
Event Rating	The rating given to a completed event to indicate its overall performance. For example, indicate whether the event was Successful or Unsuccessful.
Event URL	The Eventbrite URL for the event. Tip: If you want to communicate with a select group of people or organizations and notify them about an event, you can send them the URL in this field, which provides direct access to the event's details.

View a person's Eventbrite registration

You can view a person's event registration details, including custom questions recorded from Eventbrite.

About this task

Note: The following steps are for viewing the Event Participant record for a particular event. You can also view the Event Participant records for a specific person by going to Recruitment > People, open a person record, clicking the Interactions link, and then opening a record from the Event Service Registration list.

Procedure

1. Go to Travel & Events > View Events.
2. Open an event.
3. In the Event Participants section, open an Event Participant record for the person.

Associate a user with an event participant record

You can associate a person with an event participant record when you import event participant information and the import process cannot link the person to an event participant record.

About this task

When you import event information, the import uses the participant's name, email, and date of birth to locate and associate the correct person with the event participant record. If the import process locates the person, it associates the person with the event participant record. If not, Advise creates a person record with the participant's first name, last name and email provided in Eventbrite. It also sets the origin source for the person record to Event Registration and the Contact Method for Bulk Emails from the default settings.

The value in the EventbriteCreateNewRecordsWhenUnmatched on the Event Management Configuration settings page controls whether Advise creates new records when it cannot match a participant to an existing person in Advise.

- If the value in the setting is set to True, a person participated in an event, and the import process could not locate the person during the import, it will create a new person to associate with the participant record. Conversely, if Advise found multiple matches for the person and it could not determine which record was correct, it also creates a new person to associate with the participant record and notify the event owner that multiple matches were found.
- If the EventbriteCreateNewRecordsWhenUnmatched value on the Event Management Configuration settings page is set to False, because you do not want Advise to create person records, you can manually create a new person record and associate it with the event participant record.

If a user who registers for an event also registers guests, Advise links that user to their guests as the parent participant so that you can identify them as the event registrant. The Event Participants section on the Eventbrite Event form includes a link to the parent participant for each guest participant. The Eventbrite Event Participant form of a parent participant also includes a Guest Participants section. Advise evaluates guest participants to see if they can be linked to an existing person or organization or if there is enough information to create a person or organization record when the Eventbrite order form is set to Each Attendee.

If no names were provided for those guests in Eventbrite because the Eventbrite order form is set to Buyer Only, Advise does not link them to a person or organization. The event participant name is the parent participant's name and a (+N). For Example, `John Doe (+1,) John Doe (+2)`.

Procedure

1. Go to Travel & Events > View Events.
2. In the list, open the event that contains the list of participants.
3. In the Event Participants section, view the list of participants.
4. If an event participant in the list does not have a name in the Person field, add the person to the event participation record.
   a) Open the event participant record.
   b) In the Person field, use the lookup to select the right person.
   c) Click Save.
   d) Repeat this task for each event participant who does not have a name in the Person field.

Eventbrite events

View the details of an Eventbrite event

You can view the details of an event and examine its high-level information.

Procedure

1. Go to Communications > Events.
2. In the list, open the event that contains the details that you want to view, where the Event Provider is equal to Eventbrite Event.
3. On the Eventbrite Event form, view the details of the event.
   When you import an event from Eventbrite, the Notes section appears blank, because the import process does not import notes. After you import an event, you can manually add notes to the Notes section. From that point forward, the notes information that you added manually displays in the Notes section.

   Additionally, you can choose if the event will display on the constituent experience, define the event type, and enter a detailed description that will display on the constituent experience.

   Note: The student can view event detail imported in to Advise from Eventbrite on the constituent experience, but cannot register for the event through the constituent experience.

Eventbrite event fields

Eventbrite event fields help to define an Eventbrite event.

The list does not include fields that are self-explanatory.

Unless explicitly noted otherwise, fields on this form are display only.

Field	Description
Name	The unique name that identifies the event. If you display the event through the constituent experience, this name displays to constituents in the constituent experience.
Internal Description	An internal description of the event, as defined in Eventbrite. When you import event information from Eventbrite, the import copies the event's description in Eventbrite to this field and the Search Description field.

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td></td><td colspan="2">If you display the event on the constituent experience, this information does not display to constituents students through the constituent experience.</td></tr>
<tr><td>Purpose</td><td colspan="2">The purpose of the event.</td></tr>
<tr><td>Type</td><td colspan="2">The type of event, as defined in Eventbrite. For example, Conference, Advising Seminar, or Presentation.</td></tr>
<tr><td>Event URL</td><td colspan="2">The URL for the event.

Tip: If you want to communicate with a select group of students and notify them about an event, you can send them the URL in this field, which provides direct access to the event's details in Eventbrite.</td></tr>
<tr><td rowspan="8">Event Status</td><td colspan="2">The status of the event.

If an event contains a status other than Open, the event does not appear in the constituent experience.

Eventbrite events and CRM Events share the values in this field. The status that displays in Eventbrite is not the same status that displays in Advise. When you run the Get Eventbrite Events workflow, the status in Eventbrite is translated to the applicable status in Advise as noted below. This occurs to facilitate reporting needs across Eventbrite events and CRM Events.</td></tr>
<tr><td>Eventbrite status code</td><td>CRM Events status code</td></tr>
<tr><td>Draft</td><td>Draft</td></tr>
<tr><td>Live</td><td>Open</td></tr>
<tr><td>Started</td><td>Open</td></tr>
<tr><td>Ended</td><td>Closed</td></tr>
<tr><td>Completed</td><td>Complete</td></tr>
<tr><td>Canceled</td><td>Canceled</td></tr>
<tr><td>Maximum Capacity</td><td colspan="2">The total number of attendees that the event can accommodate.</td></tr>
<tr><td>Start Date</td><td colspan="2">The date and time that the event begins.</td></tr>
<tr><td>End Date</td><td colspan="2">The date and time that the event ends.</td></tr>
<tr><td>Time Zone</td><td colspan="2">The time zone in which the event occurs.

When the Get Eventbrite Events workflow imports an event, it maps the time zone value to a Microsoft Dynamics 365 equivalent. After you run the workflow, you must confirm that the time zone is correct. If it is not correct, you must adjust the value accordingly.</td></tr>
<tr><td>Organizer Name</td><td colspan="2">The name of the person or organization who organized or planned the event.</td></tr>
</table>

Field	Description
Organizer Description	Description of the person or organizer who organized or planned the event.
Organizer URL	URL for the person or organization who planned the event.
Owner	The event record owner.
Total Event Participants	The total number of participants for the event. Advise updates this number when you run the Get Eventbrite Events workflow to update event participant records. If you use Advise to manually add an event participant to an event, this number will not reflect the participant because the event originated in Eventbrite. If you want this number to reflect all participants, Ellucian recommends that you use Eventbrite to add the participant information and then import it to Advise.
Total Participants Accepted	The total number of participants who confirmed that they will attend the event. The Registration Status field on the event participant record must be set to Confirmed for the workflow to include a participant in this count. Advise updates this number when you run the Get Eventbrite Events workflow to update event participant records. If you use Advise to manually add an event participant to an event, this number will not reflect the participant because the event originated in Eventbrite. If you want this number to reflect all participants, Ellucian recommends that you use Eventbrite to add the participant information and then import it to Advise.
Total Participants Declined	The total number of participants who will not attend the event. The Registration Status field on the event participant record must be set to Canceled for the workflow to include a participant in this count. Advise updates this number when you run the Get Eventbrite Events workflow to update event participant records. If you use Advise to manually add an event participant to an event, this number will not reflect the participant because the event originated in Eventbrite. If you want this number to reflect all participants, Ellucian recommends that you use Eventbrite to add the participant information and then import it to Advise.
Total Participants Attended	The total number of participants who attended the event. The Attended field on the event participant record must be set to Yes for the workflow to include a participant in this count. Advise updates this number when you run the Get Eventbrite Events workflow to update event participant records. If you use Advise to manually add an event participant to an event, this number will not reflect the participant because the event originated in Eventbrite. If you want this number to reflect all participants, Ellucian recommends that you use Eventbrite to add the participant information and then import it to Advise.
Event Location	The location of the event, including the event name and physical address.

Field	Description
	If the event you imported from Eventbrite does not have a location, No Location appears. Advise creates a task that informs you the import could not find a matching location. If you choose to display the event on the constituent experience, No Location appears. For online events without a physical location, Ellucian recommends that you create a location called Online Event so that it is clear to the person registering. If the event that you imported from Eventbrite has multiple matching locations based on the duplicated detection rule for the Location entity, the import process selects the first match.
Online Event	Indicates whether the event occurs online or at a physical location.
Event Rating	The rating given to a completed event to indicate its overall performance. For example, indicate whether the event was Successful or Unsuccessful.
Activities	Allows you to keep track of communication activities related to managing the event.
Notes	Allows you to keep notes on the event and include attachments, such as catering contracts and seating charts.
Display in Constituent Experience	Indicates whether you want to display the event in the constituent experience. • Yes = You want to display the event in the constituent experience. The constituent experience displays the event when you select this value, the event's status is Open, and the event date and time are in the future. • No (default) = You do not want to display the event on the constituent experience. For example, you can select this value for a private event or if you want to use Eventbrite to promote the event instead of displaying the event through the constituent experience. Tip: If you select No, you can use the URL in the Event URL field to preview an event without displaying it to all constituents. Tip: You can select this value to hide a specific event from your constituents, and then send the event's URL, in the Event URL field for an Eventbrite event, to a specific person or a targeted group of people.
Event Type	The type of event, used to categorize the event internally. For example, lecture series or conference.
Detailed Description	The description that you want to display to users of the constituent experience. When you import Eventbrite events to Advise, the import process copies the event's description from Eventbrite to this field and the Internal

Field	Description
	Description field. After the initial import, Advise does not update the value in this field and you can modify it as necessary.

View a list of participants for an Eventbrite event

You can view a list of students who have an association with an event.

About this task

An event participant record identifies the student's or staff member's association with the event. For example, the event participation record can identify whether the student or staff member attended the event or cancelled the registration.

Procedure

1. Go to Communications > Events.
2. In the list, open the event that contains the participants list that you want to view.
3. In the Event Participants section, view the participants list.
4. Optional: If you want to view additional event participation information, open the event participant record to view its details.

View the details of an Eventbrite event participant

You can view the information for a student's event participation, including the participant's demographic information, address, and event-related details.

Procedure

1. Go to Communications > Events.
2. In the list, open the event that contains the event participant whose details you want to view.
3. In the Event Participants section, open the event participant record that you want to view.
4. On the Event Participant form, view the event participant's details.

View a list of events for a student

You can view a student's profile and examine an events list for which the student has an event participant record.

Procedure

1. Open the student's profile.
2. On the navigation bar, under Engagement, click Event Participation.
3. In the Event Participation section, view the event participation records list.

Add a participant to an Eventbrite event

You can add a participant to an event and indicate the student's participation in the event.

Procedure

1. Go to Communications > Events.
2. In the list, open the event to which you want to add a participant.
3. In the Event Participants section, click Add Event Participant record.
4. In the Person field, use the lookup to select a student.
5. Click Save.
   Advise saves the event participant record and enables the Custom Questions section.

Associate a student with an Eventbrite event participant record

You can manually associate a student with an event participant record if after you import event participant information, the import process was unable to match the event participant to a student.

About this task

When you import event information, the import uses the participant's name, email, and date of birth (if supplied on the Evenbrite form) to locate and associate the correct student with the event participant record. If the import process locates the student, it associates the student with the event participant record. If not, you can open the event participant record and use the Person field lookup to find the right student.

Procedure

1. Go to Communications > Event Participants.
2. If an event participant in the list does not have a name in the Person field, add the person to the event participation record.
   a) Open the event participant record.
   b) In the Person field, use the lookup to select the right student.
   c) Click Save.
   d) Repeat this task for each event participant who does not have a name in the Person field.

Delete an event

Delete an event when you want to remove the event.

About this task

If you want to delete an event that originated in Eventbrite, you must manually delete the record in Advise and Eventbrite. If you only delete the record in Advise, and you do not delete the record in Eventbrite, the next time that you run the workflow, it updates the status of the event to Cancelled.

Note: You cannot delete an event in Advise if the status is open. You must delete it in Eventbrite.

Procedure

1. Go to Communications > Events.
2. In the list, open the event that you want to delete.
3. On the Event form, review the event details and verify that you want to delete the event.
4. On the command bar, click Delete .
5. On the Confirm Deletion dialog box, click Delete.

   Warning! When you delete an event, Advise automatically deletes all of the participant records for the event, and all of the custom questions for each event participant.

Import event information from Eventbrite on demand

Import event and event participant information from Eventbrite to Advise when you use Eventbrite to capture event and event participant information.

About this task

If you established a workflow schedule to run the Get Eventbrite Events workflow on a specified cadence, the workflow scheduler runs the workflow at the specified interval. This task explains how to run the workflow outside of the specified cadence.

Procedure

1. Use the Workflow Scheduler to create a workflow schedule for the Get Eventbrite Events workflow.
2. Go to Settings > Workflow Scheduler.
3. Select the workflow that you created, and then click Run Selected Schedules.
   Advise creates the event, event participant, and custom question information. If Advise locates the student during the import process, it associates the event participation record with the appropriate student in Advise. If Advise cannot locate the student during the import process, it creates an event participant record, to which you must match it to the applicable student. Advise updates existing events as well, including participant names, registration status, and contact information.

What to do next

If Advise could not associate an event participant record with a student because there were multiple possible matches or there was not enough information, you can review the event participant records for the event and manually associate a student with an event.

CRM Events

You can use CRM Events to create, maintain, and manage your events in Advise. Because CRM Events are completely managed in CRM, you do not have to import event information from Eventbrite.

After you use Advise to add a new event and configure it for use with the constituent experience, your constituents can use the constituent experience to view upcoming events and register for the events. You can configure each event based on your requirements.

After you use Advise to add a new event and configure it for use with the constituent experience, your students can use the constituent experience to view upcoming events and register for the events. You can configure each event based on your requirements.

For example, on each event you can indicate whether you want to allow constituents to register for the event, whether unauthenticated users can register for the event, and whether you want to enable fee collection for each event.

For example, you can control if you want to allow students to cancel event registrations. On each event you can also indicate whether you want to allow students to register for the event.

If you have private events that you do not want to display to your entire user community, you can indicate that you do not want to display a private event on the constituent experience, and you can prevent users from locating a private event through the event search feature. When you choose not to display an event or several private events on the constituent experience, you can create a filtered list of events, and then distribute a link to the list of filtered events to a targeted group of people or organizations. With this mechanism, you can communicate with a specific target audience about a specific event or group of events without allowing other people and organizations to view an event's details.

If you have private events that you do not want to display to your entire user community, you can indicate that you do not want to display a private event on the constituent experience.

Because some constituents might choose not to use the constituent experience, you can use Advise to manually manage each CRM Event. For example, if a constituent calls your institution to register for an event, you can manually add the person as a participant to an event. You can also use Advise to manually add a walk-up participant to an event when the person had not previously registered for the event. With Advise, you can manage all aspects of the event including the participant list, registration details, constituent experience details, and participant statistics.

Because some students might choose not to use the constituent experience, you can use Advise to manually manage each CRM Event. For example, if a student calls your institution to register for an event, you can manually add the person as a participant to an event. You can also use Advise to manually add a walk-up participant to an event when the person had not previously registered for the event. With Advise, you can manage all aspects of the event including the participant list, registration details, constituent experience details, and participant statistics.

Configure CRM Events

Configure CRM Events before you create your CRM Events.

Before you begin

If you want to use an institution specific registration form instead of the default event participant form, you must create the custom form before you can associate it with an event type described in step 2.i below.

Procedure

1. Review the setting that determines whether you want Advise to create new person records when an unauthenticated constituent experience user registers for an event and the constituent experience cannot locate the correct person in Advise.
   a)
   b) In the Enable Person Creation for Unmatched Event Participants field, review the value.
   By default, this check box is selected. If you do not want to use this setting, clear the check box.

   Note: This check box applies to both Eventbrite Events and CRM Events.

   c) Click OK.
2. Configure the CRM Events validation lists.
   a) Go to Settings > Validation Lists.
   b) On the Validation List Management page, select Event Location.
   c) Click New.
   d) On the New Event Location page, enter the details of a location where your institution holds events.
   The values in the Map URL and the Directions fields display in the constituent experience event detail page for events at the location. Users can use these values to search for an event. The information in the Address fields do not display in the constituent experience.
   e) Click Save.
   f) Repeat step 2 and add event locations as necessary.

   Tip: If your institution hosts online events that do not have a physical location, you can create an Event Location of Online Event and leave the address fields blank. When you add a new event, you do not have to specify a location because you might not know the event location when you create the initial record for the event. However, when you change the status to Open, you must associate the event with a location. For this reason, Ellucian recommends that you create a value that you can associate with events that do not have a physical location, or a location value that allows you to activate an event when you do not know the location.

   g) On the Validation List Management page, select Event Type.
   The Event Type validation list allows you to group similar events together.
   h) Click New.
   i) On the New Event Type page, enter the name for the event type.
   j) In the Registration Form field, select the registration form that you want to display when a constituent selects an event with this type.

For example, you can have an event named Alumni Open House, and the Event Type field on the Event profile contains a value of Alumni Event. If the Registration Form field for the Alumni Event contains a value of Default Event Participant, the Default Event Participant form appears when a constituent uses the constituent experience to register for the Alumni Open House event.

Tip: By default, Advise includes a form named Default Event Participant. You can use the Extended Form Editor to set up institution-specific registration forms. For example, if you have an event that requires additional information, you can create a separate registration form for that event. For more information on the native Microsoft Dynamics 365 Extended Form Editor functionality, see the Microsoft Dynamics 365 Help.

k) In the Show in Search field, select Yes or No to indicate whether you want to display events of this type through the constituent experience search.

Tip: This value applies to all events with this event type and applies only to searches. If the value in the Display in Constituent Experience field is Yes, but this value is No, the event is private.

l) Click Save.

m) On the Validation List Management page, select Event Rating.
The Event Rating validation list allows you to give ratings to the events.

n) Click New.

o) On the New Event Rating page, enter the name for the event rating.

p) Click Save.

q) Repeat step 2 and add event ratings as necessary.

r) On the Validation List Management page, select Meal Preference.

s) Click New.

t) On the New Meal Preference page, enter the name for the meal preference.

u) Click Save.

3. Configure whether you want students to be able to cancel their event registrations.

   a) On the navigation bar, click Advanced Find .

   b) In the Look for field, select Configuration Settings.

   c) Click Results.

   d) Click AllowEventRegistrationCancellation.

   e) Indicate whether you want students to be able to cancel their event registrations.

   - TRUE - students will be able to cancel their event registrations.
   - FALSE - students will not be able to cancel their event registrations.

4. Click Save.

5. Optional: Configure the Event URL and Filter Event view settings.
   You can perform this step if you want to distribute a URL to an event independently of the constituent experience. If you do not want to send a URL to an event independently, you do not need to perform this step.

Warning! If you want to use this functionality, you must complete this step before you start creating events. If you do not complete this step before you start creating events, you cannot populate the Event URL field on an event and you cannot .

a) On the navigation bar, click Advanced Find .

b) In the Advanced Find dialog box, in the Look for field, select Configuration Settings.

c) Click Results.

d) In the list, select ExternalSiteEventViewURL.

e) In the Configuration Settings page, in the Value field, enter the URL that CRM Events uses to generate a URL for each event.

   This setting uses the format https://ConstituentExperienceBaseURL/<site name>/Events/Details?eventId

   For example, https://elluciancloud.com/UndergraduateSchool/Events/Details?eventId

f) Click Save.

g) Repeat step 5.d and select ExternalSiteFilteredEventViewURL.

h) In the Configuration Settings page, in the Value field, enter the URL that CRM Events uses to filter lists of events.

   This setting uses the format https://ConstituentExperienceBaseURL/<site name>/Events/List

   For example, https://elluciancloud.com/UndergraduateSchool/Events/List

i) Click Save.

6. Enable the CRM Events configuration setting.

   a)

   b) In the Enable Events field, select the check box.

   c)

7. Optional: If you want to create events that require the collection of a registration fee, enable the collection fees setting.
   You only need to perform this step if one or more of your events require the collection of a registration fee. If none of your events require the collection of a registration fee, you do not need to perform this step.

   Warning! You must configure the eCommerce settings before you turn on event fee collection for CRM Events.

   a) Go to Integration > Event Management Settings.

   b) Select Enable Fee Collection for CRM Events.

   c) Click Save.

What to do next

You can now add CRM Events.

Manage CRM Events

Create a CRM Event, view or modify its details, or cancel it.

Create a CRM Event

Create a CRM Event, specify its attributes, and configure it for use with the constituent experience.

Before you begin

You must have configured CRM Events before you can create a CRM Event.

Procedure

1. Go to Advancement > Events.
2. In the drop-down list of views, select Active CRM Events.
3. Click New.
4. In the Information section, enter values in the required and optional fields.
   By default, the Event Status field contains a status of Draft, which means you are in the initial stages of creating the event. An event with this status does not display in the constituent experience. After you complete your internal review of the event and you are ready to display the event on the constituent experience, you can set the status of the event to Open. The constituent experience displays the event when you select a status of Open, the event's Display in Constituent Experience indicator is set to Yes, the event type for the event has the Display in Search set to Yes, and the event's location is not set to No Location. If the event does not meet all criteria, the event does not display in the constituent experience. Typically, an event progresses through the following statuses from start to finish: Draft, Ready for Review, Open, Closed, and Complete.
5. Optional: In the Statistics section, enter a number in the Goal Attendees field and specify how many people you want or expect to attend the event.
   You cannot enter values in any other field in this section. As people register or cancel registrations, Advise automatically updates the values in the other fields in this section.
6. Optional: In the Event Fees section, in the eCommerce Item field, select the applicable eCommerce Item.

   Note:

   - The Event Fees section appears only if you selected the Enable Fee Collection for CRM Events check box on the Event Management Configuration Settings page.
   - When you add an event, the constituent experience forces all users to pay the fee before the user can register. You can, however, waive fees for event participants that you manually register through Advise.
   - After you attach an eCommerce item to an event and there are registered participants, do not change or delete the eCommerce Item. Changes will result in participants paying different prices for the same event.

For additional information, see ../advance_help/t_settings_ecommerce_configure.xml.

7. On the Related Data tab, click Details.
8. In the Details and Attributes sections, enter details and attributes for the event.
   You can use these sections to indicate the event's capacity, expenses, catering, host information, and other related details.
9. On the Related Data tab, click Constituent Experience.
10. In the Display Details, Registration Details, and Event Meal Preferences sections, enter the display, registration, and meal preference details for the event.
    You can use these sections to indicate how the event displays on the constituent experience, whether the event allows registrations, whether unauthenticated donors can register for the event, whether the event allows guests, and maintain meal preferences for the event.
11. Optional: On the Related Data tab, click Recurrence.
12. Optional: In the Frequency field, specify the recurring frequency on which the event occurs.
    When you select a value, Advise displays additional fields that allow you to specify the recurrence details.

    Note: If the event occurs only one time, accept the default value of No Recurrence.

    Warning! You must use the Recurrence section to enter the recurring event details before you use the Event Status field to change the status of the event to Open. If you save an event with an Event Status of Open, Advise changes the values in the Recurrence section to display only and you cannot modify the recurrence details.

    For additional information on creating a recurring event. see Create a recurring CRM Event.
13. Optional: On the Related Data tab, click Attachments.
14. Optional: In the Notes Attachments and Documents sections, add attachments and documents that relate to the event.
    For example, you can attach a copy of a catering contract, an event agenda, or a seating map of the location.

    Note: The Documents section appears only to institutions that integrate with Banner Document Management.
15. Click Save.

CRM Event fields

CRM Event fields allow you to specify the details of a CRM Event.

The list does not include fields that are self-explanatory.

Note: Descriptions that reference the constituent experience apply only if you have enabled the event for use with the constituent experience.

Table 1: Event

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Event Name</td><td>The unique name that identifies the event.

If you display the event through the constituent experience, this name displays to constituents students in the constituent experience.</td></tr>
<tr><td>Event Status</td><td>The status of the event.

If an event contains a status other than Open, the event does not appear in the constituent experience regardless of the value in the Display in Constituent Experience field.

As you progress through the various statuses, Advise requires you to add additional information to the event. Additionally, because you cannot always change the status back to a previous status, you should take steps to ensure that you are ready to proceed from one status to the next.

Valid values include the following. Typically, an event progresses through the statuses in this order:

• Draft (default) = The event is in its initial creation stage, and you are not ready to allow people to register for the event.
• Ready for Approval = The event is ready for internal review, and you are not ready to allow people to register for the event.
• Open = The event is ready for people to register. If the event contains this status, and the Display in Constituent Experience field contains a value of Yes, the event displays on the constituent experience. The event does not display if the Event Location is set to No Location.

Note:
– If the Show in Search field on the Event Type validation list for the event's type is set to No, the event does not display when a constituent uses the constituent experience to search for the event. You can send the event's URL to specific individuals to inform them about the event.
– When you select this value, an additional audit trail field named Approved By appears on the Event profile page. Advise populates the field with the name of the user who changed the event's status to Open.

Warning! If the event is a recurring event, you must use the Recurrence section to enter the recurring event details before you select this value and save the event. If you save an event with an Event Status of Open, Advise changes the values in the</td></tr>
</table>

Field	Description
	Recurrence section to display only and you cannot modify the recurrence details. • Closed = The event is closed and registrations are not allowed. • Complete = The event is over and complete. • Canceled = The institution has canceled the event. Registrations are not allowed. If you want to cancel an event, you can select this status and save the change or click Cancel Event on the command bar while viewing the event's profile. When you cancel an event, Advise automatically cancels the event's participant records.
Event Type	The type of event. For example, Alumni Event, Athletics Event, or Fundraising Event.
Event Location	The location of the event. When you select an Event Status of Draft, you do not have to enter a value in this field because you might not know the location of the event at the time that you create the event. When you change the Event Status from Draft to any other Status, Advise requires you to enter a value in this field. Note: If the event does not have a location because it does not occur at a physical location, you can select a value that indicates there is no location. Advise includes a system reserved value of No Location. If you select this value, the event does not display in the constituent experience. For example, a Virtual Event.If you display the event on the constituent experience, a user can use the event's address information to search for an event. A user can also combine the address information with a distance parameter to locate events.
Start Date	The date and time that the event begins.
End Date	The date and time that the event ends.
Time Zone	The time zone in which the event occurs. If you display the event on the constituent experience, the event's start date and time appears before this value. You can manually select a value. Note: You can update this field only when the event is in Draft or Ready for approval status.
Internal Description	An internal description of the event.

Field	Description
	If you display the event on the constituent experience, this information does not display to constituents students through the constituent experience.
eCommerce Item	The eCommerce item that determines the fee per event participant. Note: The Event Fees section appears only if you selected the Enable Fee Collection for CRM Events setting. You can only select items that have an amount that is greater than zero. Ellucian recommends that you do not share eCommerce items across events. Advise does not support the use of discounts.
Goal Attendees	An internal goal of how many people or organizations you want to attend the event. If you display the event on the constituent experience, this information does not display to constituents students through the constituent experience.
Registered Participants	The total number of people or organizations who registered for the event. Advise updates this display-only value automatically when a person or organization registers for the event. You do not have to run a workflow to update this value. Advise decrements this value if a registered guest cancels their registration.
Registered Guests	The total number of people or organizations who registered as guests of the participants. Advise updates this display-only value automatically when a person or organization registers for the event. You do not have to run a workflow to update this value. Advise decrements this value if a registered guest cancels their registration.
Total Registered	The total number of registered participants and their registered guests. Advise updates this display-only value automatically when a person or organization registers for the event. You do not have to run a workflow to update this value.

Field	Description
	Advise decrements this value if a registered guest cancels their registration.
Minimum Capacity	The minimum number of participants that must attend the event.
Maximum Capacity	The maximum number of participants that can register for and attend the event. When the total number of participants reaches the maximum capacity, the status of the event on the constituent experience changes to Event Full and the constituent experience does not allow additional registrations. Warning! This setting does not apply if you use Advise to manually add participation records. Consequently, if you use Advise to manually add participation records, you can exceed the maximum number of guests and the maximum capacity for the event.
Estimated Expenses	The estimated cost of the event, including all of its expenses.
Actual Expenses	The actual cost of the event, including all of its expenses.
Equipment	Text field that allows you to track the equipment that you require for the event. For example, you can use this field to track the rental of tables and chairs or music equipment.
Catering	Text field that allows you to track information about the caterer for the event.
Host Organization	The name of the active host organization in Advise. If the organization does not exist, you can create a new organization record. Because a person and an organization can jointly host an event, if you enter a value in this field, Advise displays the Host Person field directly below and you can enter a value in both fields.
Host Person	The name of the active host person in Advise. If the person does not exist, you can create a new person record. Because a person and an organization can jointly host an event, if you enter a value in this field, Advise displays the Host Organization field directly above and you can enter a value in both fields.
College	The name of the college that has an association with the event.
Department	The name of the department that has an association with the event.
Division	The name of the division that has an association with the event.

Field	Description
Event Rating	The rating given to a completed event to indicate its overall performance. For example, indicate whether the event was Successful or Unsuccessful.
Display in Constituent Experience	Indicates whether you want to display the event on the constituent experience. • Yes = You want to display the event on the constituent experience. The constituent experience displays the event when you select this value, the event's status is Open, and the event's location is not No Location. • No (default) = You do not want to display the event on the constituent experience. For example, you can select this value for a private event. Tip: If you select this value, you can use the URL in the Event URL field to preview an event without displaying it to all constituents. Note: If the Show in Search field on the Event Type validation list for the event's type is set to No, the event does not display when a constituent uses the constituent experience to search for the event, regardless of whether the value in this field is set to Yes. You can send the event's URL to specific individuals to inform them about the event. Tip: You can select this value to hide a specific event from your constituents, and then send the event's URL, in the Event URL field, to a specific person or a targeted group of people. You can also create a list of filtered events that includes this event. After you create the list of filtered events, you can distribute the URL to a targeted list of private guests. Because the private guests have a direct link to the event, they can use the constituent experience to view the details of the event, and depending on the event's settings, register for the event. And because other constituents do not have a direct link to the event, they cannot view the event's details or register for the event.
Event URL	The URL for the event. Advise generates this display-only URL when you save a new event.
Display Meal Preference	Indicates whether you want to provide a meal preference option to each participant during the registration process.

Field	Description
	• No (default) = You do not want to display meal preferences to each participant during the registration process. You can select this value when the event does not include a meal, or if all of the participants will receive the same meal. • Yes = You want to display meal preferences to each participant during the registration process. You must use the Event Meal Preferences section to add meal preferences when you select this value.
Search Description	The description that you want to display to users of the constituent experience. This description displays in the Search Results under the name of the event, as noted in the Event Name field.
Detailed Description	The description that you want to display to users of the constituent experience when they click the name of the event to view its details. Tip: You can enter HTML in this field to provide a stylized page and include an image for the event.
Allow Registration	Indicates whether you want to allow constituents to use the constituent experience to register for the event. • No (default) = You do not want to allow constituents to register for the event or the event does not require registration. The Register button does not appear on the event's detail page in the constituent experience. For example, you can select this option if the event is an open house that does not require registration. When you select this value, Advise does not allow you to enter values in the Allow Unauthenticated, Registration Deadline, Maximum Number of Guests, and Collect Guest Details fields. • Yes = You want to allow constituents to use the constituent experience to register for the event. If the event has not reached its capacity, and the end date and registration deadline have not passed, the Register button appears on the event's detail page in the constituent experience.
Allow Registration	Indicates whether you want to allow students to use the constituent experience to register for the event. • No (default) = You do not want to allow students to register for the event or the event does not require registration. The Register button does not appear on the event's detail page in the constituent experience. For example, you can select this option if the event is an open house that does not require registration. When you select this value, Advise does not allow you to enter values in the Allow Unauthenticated, Registration Deadline, Maximum Number of Guests, and Collect Guest Details fields. • Yes = You want to allow students to use the constituent experience to register for the event. If the event has not reached

Field	Description
	its capacity, and the end date and registration deadline have not passed, the Register button appears on the event's detail page in the constituent experience.
Allow Unauthenticated	Indicates whether you want to allow unauthenticated constituents to use the constituent experience to register for the event. You can only enter a value in this field when the value in the Allow Registration field is set to Yes. • No (default) = You do not want to allow unauthenticated constituents to register for the event. • Yes = You want to allow unauthenticated constituents to register for the event. The Register button appears regardless of whether or not a constituent is logged in to the constituent experience. If the constituent did not log in to the constituent experience and registered for an event, depending on the setting in the Enable Person Creation for Unmatched Event Participants field on the Event Management Configuration Settings page, Advise attempts to locate and associate the event registration with the correct person. If Advise finds a match, it associates the event registration with the existing person record and displays that person's name on the event registration. If Advise cannot find a match and the Enable Person Creation for Unmatched Event Participants setting is selected, Advise creates a new person record for the constituent and displays the new constituent's name on the event registration. When creating email, phone, or address contact records for a new person record, Advise sets the contact records to preferred, however, for a phone contact, it does not set the text message allowed value to preferred. You can update this information as applicable. In some situations, Advise might not match the person in your system and subsequently create a new record for a person that already exists. If you determine that a duplicate person record exists, you can use Duplicate Merge to locate and merge the records after you process the event registration. If your institution uses multiple sites with the constituent experience, and a constituent uses the constituent experience to register for an event, when Advise creates a new person, email, phone, or address association record for the constituent, it associates the Source value for the site that owns the event with the new record. Because each site that uses the constituent experience can have its own Source value, you might have person, email, phone, and address association records from the constituent experience, each of which has a different Source value.

Field	Description
Registration Deadline	The date on which registration for the event closes. Constituents cannot register for the event after this date because the constituent experience automatically removes the Register button after this date. If you want to allow constituents to register for the event even after the event has started, you can leave this field blank.
Registration Deadline	The date on which registration for the event closes. Students cannot register for the event after this date because the constituent experience automatically removes the Register button after this date. If you want to allow students to register for the event even after the event has started, you can leave this field blank.
Maximum Number of Guests	The maximum number of guests that each participant can bring to the event. If you do not enter a value, the constituent experience does not allow participants to bring any guests. If you want to allow participants to bring guests, you must enter a number. Warning! This setting does not apply if you use Advise to manually add participant records. Consequently, if you use Advise to manually add participant records, you can inadvertently exceed the maximum number of guests and the maximum capacity for the event. When constituents use the constituent experience to view the details of an event that allows guests, the event's detail page includes information that informs the constituents how many guests they can bring to the event. When participants register for the event, the participants can either enter the number of guests or enter each guest's details, depending on the value in the Collect Guest Details field. When students uses the constituent experience to view the details of an event that allows guests, the event's detail page includes information that informs the students how many guests they can bring to the event. When the participants registers for the event, the participants can either enter the number of guests or enter each guest's details, depending on the value in the Collect Guest Details field.
Collect Guest Details	Indicates whether you want to collect the details of each participant's guest.

Field	Description
	You can select a value after you enter a number in the Maximum Number of Guests field. • No (default) = You do not want to capture information about each participant's guests. When participants register, they can use the Number of Guests field to indicate how many guests they will bring to the event. The participants cannot enter additional information about each guest. During the registration process, if participants use the Number of Guests field to enter a number that exceeds the value in the Maximum Number of Guests field, the constituent experience displays a message that reminds the participants about the maximum number of guests. If you select this value, and you set the Display Meal Preference to Yes, then you cannot receive information on guest meal preference. When this occurs, the single meal preference selection applies to the registered participant and all of their guests. If the Maximum Number of Guests field is blank, Advise sets this field to No and you cannot change the value. • Yes = You want to capture information about each participant's guest. When participants register, they can click Add Participant to enter a guest's details, including the guest's First name, Last Name, Email, Special Accommodation, and meal preference, if applicable. The participant can add guest details for each guest up to the maximum, as noted in the Maximum Number of Guests field. Advise attempts to locate and associate the guest's event registration with the correct person record in Advise.
Event Meal Preferences	Indicates the meal preferences for the event. When the value in the Display Meal Preference field is Yes, you can use this section to add each type of meal that you want to display to event participants.
Frequency	Indicates whether the event recurs on a specified frequency. After you select an Event Status of Open, you cannot modify the recurrence event schedule. You should make sure that you add the event recurrence information before you change the Event Status to Open. If you entered incorrect event recurrence information, you must either delete the recurring event and all of its recurrences or cancel the recurring event. You can select one of the following recurrence values: • No Recurrence (default) = The event is a one time event and it does not recur. When you select an Event Status of Open, Advise does not create any recurring events for the event.

Field	Description
	• Daily = The event recurs daily. You can specify whether the event recurs every day or every weekday. • Weekly = The event recurs on the same day or days every week. You can specify that the event repeats on a weekly basis or on a specified interval, for example, every two weeks. You can also specify which day or days of the week the event recurs. For example, you can create an event that recurs every Tuesday and Thursday. To select multiple days, select the first day, press Ctrl on the keyboard, and then select the next day that you want to include. • Monthly = The event recurs monthly on a specific day or on a specified interval. For example, the second Tuesday of each month.
Recur / Every	Indicates how often an event occurs. The value in the Frequency field determines which fields and values appear. • Recur - This field appears when you select a frequency of Daily or Monthly. If you select Daily because the event recurs every day, you can enter a maximum of 730 days. • Every - This field appears when you select a frequency of Weekly. You can specify which day or days of the week the event recurs.
Range	Indicates when the last recurring event occurs. • End after = You can specify how many times the event should occur before it ends. You can enter a maximum of 730 occurrences. This number includes the current event. • End by = You can enter a specific date on which the recurring event ends. The date you enter is inclusive.
Recurring Event Status	Indicates the status of the recurring event. When you change the status of the event in the Event Status field to Open, Advise sets the status of all of the recurring events to the recurring status in this field. • Draft (default) = The recurring event is in its initial creation stage and requires additional changes. • Ready for Approval = The recurring event is ready for internal review before making the event available for event participants. • Open = The recurring event is ready for people to register for the event. You cannot select this value for an eCommerce event. You must validate and change the status of each recurring event.

Create a CRM Event

Create a CRM Event, specify its attributes, and configure it for use with the constituent experience.

Before you begin

You must have configured CRM Events before you can create a CRM Event.

Procedure

1. Go to Communication > Events.
2. In the drop-down list of views, select Active Events.
3. Click New.
4. In the Information section, enter values in the required and optional fields.
   By default, the Event Status field contains a status of Draft, which means you are in the initial stages of creating the event. An event with this status does not display in the constituent experience. After you complete your internal review of the event and you are ready to display the event on the constituent experience, you can set the status of the event to Open. Typically, an event progresses through the following statuses from start to finish: Draft, Ready for Review, Open, Closed, and Complete. There is validation to restrict the user going from Open back to Approved or Draft.
5. Optional: In the Statistics section, enter a number in the Goal Attendees field and specify how many people you want or expect to attend the event.
   You cannot enter values in any other field in this section. As people register or cancel registrations, Advise automatically updates the values in the other fields in this section.
6. On the Notes tab, you can create notes and attach files, as necessary.
7. Optional: In the Frequency field, specify the recurring frequency on which the event occurs.
   When you select a value, Advise displays additional fields that allow you to specify the recurrence details.

   Note: If the event occurs only one time, accept the default value of No Recurrence.

   Warning! You must use the Recurrence section to enter the recurring event details before you use the Event Status field to change the status of the event to Open. When you change the status to Open is when Advise creates a recurring event and locks the fields. If you save an event with an Event Status of Open, Advise changes the values in the Recurrence section to display only and you cannot modify the recurrence details.

   For additional information on creating a recurring event. see Create a recurring CRM Event.
8. On the Details tab, enter information in the Details and Attributes sections for the event.
   You can use these sections to indicate the event's capacity, expenses, catering, host information, and other related details.
9. On the Constituent Experience tab, in the Display Details, Registration Details, and Event Meal Preferences sections, enter the display, registration, and meal preference details for the event.
   You can use these sections to indicate how the event displays on the constituent experience, whether the event requires registrations, and maintain meal preferences for the event.

10. Click Save.

CRM Event fields

CRM Event fields allow you to specify the details of a CRM Event.

The list does not include fields that are self-explanatory.

Note: Descriptions that reference the constituent experience apply only if you have enabled the event for use with the constituent experience.

Table 1: Event

Field	Description
Event Name	The unique name that identifies the event. If you display the event through the constituent experience, this name displays to constituents students in the constituent experience.
Event Status	The status of the event. If an event contains a status other than Open, the event does not appear in the constituent experience regardless of the value in the Display in Constituent Experience field. As you progress through the various statuses, Advise requires you to add additional information to the event. Additionally, because you cannot always change the status back to a previous status, you should take steps to ensure that you are ready to proceed from one status to the next. Valid values include the following. Typically, an event progresses through the statuses in this order: • Draft (default) = The event is in its initial creation stage, and you are not ready to allow people to register for the event. • Ready for Approval = The event is ready for internal review, and you are not ready to allow people to register for the event. • Open = The event is ready for people to register. If the event contains this status, and the Display in Constituent Experience field contains a value of Yes, the event displays on the constituent experience. Warning! If the event is a recurring event, you must use the Recurrence section to enter the recurring event details before you select this value and save the event. If you save an event with an Event Status of Open, Advise changes the values in the Recurrence section to display only and you cannot modify the recurrence details.

Field	Description
	• Closed = The event is closed and registrations are not allowed. Closed events do not show on the constituent experience. • Complete = The event is over and complete. Complete events do not show on the constituent experience. • Canceled = The institution has canceled the event. Registrations are not allowed. If you want to cancel an event, you can select this status and save the change or click Cancel Event on the command bar while viewing the event's profile. When you cancel an event, Advise automatically cancels the event's participant records.
Event Type	The type of event. For example, Advising Seminar, Orientation, Information Session.
Event Location	The location of the event. When you select an Event Status of Draft, you do not have to enter a value in this field because you might not know the location of the event at the time that you create the event. When you change the Event Status from Draft to any other Status, Advise requires you to enter a value in this field. Note: If the event does not have a location because it does not occur at a physical location, you can select a value that indicates there is no location.
Start Date	The date and time that the event begins.
End Date	The date and time that the event ends.
Time Zone	The time zone in which the event occurs. Note: You can update this field only when the event is in Draft or Ready for approval status.
Internal Description	An internal description of the event. If you display the event on the constituent experience, this information does not display to constituents students through the constituent experience.
Goal Attendees	An internal goal of how many people you want to attend the event. If you display the event on the constituent experience, this information does not display to constituents students through the constituent experience.
Registered Participants	The total number of people who registered for the event.

Field	Description
	Advise updates this display-only value automatically when a person registers for the event. You do not have to run a workflow to update this value. Advise decrements this value if a registered guest cancels their registration.
Registered Guests	The total number of people who registered as guests of the participants. Advise updates this display-only value automatically when a person registers for the event. You do not have to run a workflow to update this value. Advise decrements this value if a registered guest cancels their registration.
Total Registered	The total number of registered participants and their registered guests. Advise updates this display-only value automatically when a person registers for the event. You do not have to run a workflow to update this value. Advise decrements this value if a registered guest cancels their registration.
Minimum Capacity	The minimum number of participants that must attend the event.
Maximum Capacity	The maximum number of participants that can register for and attend the event. When the total number of participants reaches the maximum capacity, the constituent experience does not allow additional registrations. Warning! This setting does not apply if you use Advise to manually add participation records. Consequently, if you use Advise to manually add participation records, you can exceed the maximum number of guests and the maximum capacity for the event.
Estimated Expenses	The estimated cost of the event, including all of its expenses.
Actual Expenses	The actual cost of the event, including all of its expenses.
Equipment	Text field that allows you to track the equipment that you require for the event.

Field	Description
	For example, you can use this field to track the rental of tables and chairs or IT equipment.
Catering	Text field that allows you to track information about the caterer for the event.
Host Person	The name of the active host person in Advise. If the person does not exist, you can create a new person record.
Event Rating	The rating given to an event to indicate its overall performance. For example, indicate whether the event was Successful or Unsuccessful.
Display in Constituent Experience	Indicates whether you want to display the event on the constituent experience. • Yes = You want to display the event on the constituent experience. The constituent experience displays the event when you select this value, the event's status is Open, and the event date and time is in the future. • No (default) = You do not want to display the event on the constituent experience. For example, you can select this value for a private event.
Search Description	This field is not in use.
Detailed Description	The description that you want to display to users of the constituent experience when they click the name of the event to view its details.
Registration Required	Indicates whether you want students to use the constituent experience to register for the event. • No (default) = You do not want students to register for the event or the event does not require registration. The Register button does not appear on the event's detail page in the constituent experience. For example, you can select this option if the event is an open house that does not require registration. • Yes = You want students to use the constituent experience to register for the event. If the event has not reached its capacity, and the end date and register before date have not been reached the Register button appears on the event's detail page in the constituent experience.
Register Before	The date on which registration for the event closes. In this case, the registration button will no longer be available. Students cannot register for the event on this date. They must register no later than the day before this date, because the

Field	Description
	constituent experience automatically removes the Register button on this date. If you want to allow students to register for the event even after the event has started, you can leave this field blank.
Event Meal Preferences	Indicates the meal preferences for the event. You can create a new meal preference using the lookup control for this field, if necessary.
Frequency	Indicates whether the event recurs on a specified frequency. After you select an Event Status of Open, you cannot modify the recurrence event schedule. You should make sure that you add the event recurrence information before you change the Event Status to Open. If you entered incorrect event recurrence information, you must either delete the recurring event and all of its recurrences or cancel the recurring event. You can select one of the following recurrence values: • No Recurrence (default) = The event is a one time event and it does not recur. When you select an Event Status of Open, Advise does not create any recurring events for the event. • Daily = The event recurs daily. You can specify whether the event recurs every day or every weekday. • Weekly = The event recurs on the same day or days every week. You can specify that the event repeats on a weekly basis or on a specified interval, for example, every two weeks. You can also specify which day or days of the week the event recurs. For example, you can create an event that recurs every Tuesday and Thursday. To select multiple days, select the first day, press Ctrl on the keyboard, and then select the next day that you want to include. • Monthly = The event recurs monthly on a specific day or on a specified interval. For example, the second Tuesday of each month.
Recur/Every	Indicates how often an event occurs. The value in the Frequency field determines which fields and values appear. • Recur - This field appears when you select a frequency of Daily or Monthly. If you select Daily because the event recurs every day, you can enter a maximum of 730 days. • Every - This field appears when you select a frequency of Weekly. You can specify which day or days of the week the event recurs.
Range	Indicates when the last recurring event occurs.

Field	Description
	• End after = You can specify how many times the event should occur before it ends. You can enter a maximum of 730 occurrences. This number includes the current event. • End by = You can enter a specific date on which the recurring event ends. The date you enter is inclusive.
Recurring Event Status	Indicates the status of the recurring event that Advise will create when it updates the current event status to Open. When you change the status of the event in the Event Status field to Open, Advise sets the status of all of the recurring events to the recurring status in this field. • Draft (default) = The recurring event is in its initial creation stage and requires additional changes. • Ready for Approval = The recurring event is ready for internal review before making the event available for event participants. • Open = The recurring event is ready for people to register for the event. You must validate and change the status of each recurring event.

Create a recurring CRM Event

Create a recurring CRM Event and specify the frequency on which it recurs.

About this task

A recurring event is an event that repeats on a specified cadence. For example, a sporting event that recurs every Sunday, or a theater performance that recurs every Tuesday and Thursday.

A recurring event is an event that repeats on a specified cadence. For example, a lecture series that occurs every Tuesday.

Procedure

1. Go to Advancement > Events.
2. Go to Communications > Events.
3. In the drop-down list of views, select Active CRM Events.
4. In the drop-down list of views, select Active Events.
5. Click New.
6. Enter information in all required fields and additional fields as needed.

   Warning! Do not select an Event Status of Open until after you enter your recurring event information. After you select an Event Status of Open, you cannot modify the recurrence event schedule. You should make sure that you add the event recurrence information before you change the Event Status to Open. If you entered incorrect event recurrence information, you must either delete the recurring event and all of its recurrences or cancel the recurring event.

7. On the Related Data tab, click Recurrence.
8. In the Frequency field, select the frequency on which the event recurs.
   You can select one of the following recurrence values:
   - No Recurrence (default) = The event is a one time event and it does not recur. When you select an Event Status of Open, Advise does not create any recurring events for the event.
   - Daily = The event recurs daily. You can specify whether the event recurs every day or every weekday.
   - Weekly = The event recurs on the same day or days every week. You can specify that the event repeats on a weekly basis or on a specified interval, for example, every two weeks. You can also specify which day or days of the week the event recurs. For example, you can create an event that recurs every Tuesday and Thursday. To select multiple days, select the first day, press Ctrl on the keyboard, and then select the next day that you want to include.
   - Monthly = The event recurs monthly on a specific day or on a specified interval. For example, the second Tuesday of each month.
9. In the Frequency field, select the frequency on which the event recurs.
   - No Recurrence (default) = The event is a one-time events, and it does not recur. When you select an Event Status of Open, CRM Advise does not create any recurring events for the event.
   - Daily = The event recurs daily. You can specify whether the event recurs every day or every weekday.
   - Weekly = The event recurs on the same day or days every week. You can specify that the event repeats on a weekly basis or on a specified interval, for example, every two weeks. You can also specify which day or days of the week the event recurs. For example, you can create an event that recurs every Tuesday and Thursday. To select multiple days, select the first day, press Ctrl on the keyboard, and then select the next day that you want to include.
   - Monthly = The event recurs monthly on a specific day or on a specified interval. For example, the second Tuesday of each month.
10. In the Recur or Every field, specify how often an event occurs.
    The value in the Frequency field determines which values fields and values appear.
    - Recur - This field appears when you select a frequency of Daily or Monthly. If you select Daily because the event recurs every day, you can enter a maximum of 730 days.
    - Every - This field appears when you select a frequency of Weekly. You can specify which day or days of the week the event recurs.
11. In the Recur or Every field, specify how often an event occurs.
    The value in the Frequency field determines which fields and values appear.
    - Recur - This field appears when you select a frequency of Daily or Monthly.
    - Every - This field appears when you select a frequency of Weekly. You can specify which day or days of the week the event recurs.

12. In the Range field, indicate when the event ends.
    For example, specify that the event ends after 10 occurrences or that the event ends on the last day of the year.
    - End after = You can specify how many times the event should occur before it ends. You can enter a maximum of 730 occurrences. This number includes the current event.
    - End by = You can enter a specific date on which the recurring event ends. The date you enter is inclusive.
13. In the Recurring Event Status field, enter the status to set the recurring events to when created.

    When you change the status of the event in the Event Status field to Open, Advise sets the status of all of the recurring events to the recurring status in this field.
    - Draft (default) = The recurring event is in its initial creation stage and requires additional changes.
    - Ready for Approval = The recurring event is ready for internal review before making the event available for event participants.
    - Open = The recurring event is ready for people to register for the event. You must validate and change the status of each recurring event.
14. Click Save.

    Warning! When you are certain that you do not need to make any additional changes to the recurring event, you can select an Event Status of Open. After you select an Event Status of Open, you cannot modify the recurrence event schedule. You should make sure that you add and confirm the event recurrence information before you change the Event Status to Open. If you entered incorrect event recurrence information, you must either delete the recurring event and all of its recurrences or cancel the recurring event.

Result

Advise creates the recurring events. When you view the list of CRM Events, individual events appear for each occurrence. With a few exceptions noted below, each occurrence contains the same attributes that you entered when you created the recurring event. You can manage each event separately, and if necessary, cancel an individual event occurrence or the entire series of events. If you update the parent event, Advise does not update the recurring events to include the change. You can use bulk edit if you need to make a change to all event occurrences.
When you create a recurring event, each occurrence does not inherit certain information. Instead, you can maintain the information on each occurrence at your discretion:

- Event Status - Advise uses the value in the Recurring Event Status field instead of the value in the Event Status field.
- Start Date and End Date - Advise uses the frequency information that you provided to calculate the start and end date for each recurrence.
- Event URL - Advise uses the Event URL configuration setting to calculate an individual URL for each recurring event.
- Registration Deadline - Advise uses the Registration Deadline from the event to calculate the deadline for each occurrence.

For example, if the registration deadline for the first event was three days before the event start date, Advise calculates the registration deadline for all the recurring events to three days before each recurring event's start date.

If the event does event does not have a registration deadline, Advise allows constituents to register for each recurring event up until the end date of the recurring event.

- Register Before - Advise uses the Register Before on the original event to calculate the Register Before for each occurrence relative to the start date of the event.
  For example, if the register before date for the first event was three days before the event start date, Advise calculates the registration deadline for all the recurring events to three days before each recurring event's start date.

  If the event does event does not have a register before date, Advise allows students to register for each recurring event through the end date of the event.

View the details of a CRM Event

View the details of a CRM Event and examine its progress, including its statistics on registered participants.

Procedure

1. Go to Advancement > Events.
2. Go to Communications > Events.
3. In the drop-down list of views, select Active CRM Events.
4. In the drop-down list of views, select Active Events.
5. On the Event form, view the details of the selected event.

Cancel a CRM Event

Cancel a CRM Event when you determine that the event will not occur.

About this task

You can cancel a CRM Event when associated records exist for the event and you want to retain an audit of the records. For example, if you cancel an event, and you want to retain a record of the people who registered for the event before you canceled it, or if you receive a refund from a caterer when you cancel the event, you can use Advise to cancel the event and retain an audit of the registrant and catering records. Conversely, if you delete an event, you will lose all associated records. You should only delete an event if you accidentally created it, and you are certain that it does not have any related records that you want to retain.

Procedure

1. Go to Advancement > Events.

2. Go to Communications > Events.
3. In the drop-down list of views, select Active CRM Events.
4. In the drop-down list of views, select Active Events.
5. In the list, select the event that you want to cancel.
6. In the command bar, click Cancel Event.

   If an event has recurrences and you want to cancel the event and all of its recurrences, you can use the command bar to select Cancel Recurring Events.
7. Click Save.

Result

Advise cancels the event by changing the Event Status to Canceled and changes the registration status of all event participants to Canceled. If an authenticated constituent experience user registered for an event and you subsequently cancel the event, when the constituent views the My Events page, the constituent experience displays information that tells the constituent the event was canceled.

Advise cancels the event by changing the Event Status to Canceled and changes the registration status of all event participants to Canceled.

Advise does not send notifications that the event was canceled. You can use an institution-specific procedure or triggered communication plan to notify registered participants when you cancel an event.

Additionally, if you cancel an event that has an event fee, and a refund policy exists for the event, you might need to refund the fee. Advise creates a task for the event owner to let them know that an event with an fee was canceled. You can compare the Total Registrants against the Total Event Fees to understand whether there is a mismatch. If a mismatch exists, you might need to issue a refund. If you issue a refund, you should update the Total Event Fees.

Manage CRM Event Orders

View the details of system-generated and manually-created event orders.

When an event has a linked eCommerce item in the event fees section, a fee is required for the registration. If an event participant registers from the constituent experience, Advise calculates the total event fees and processes the transaction through the payment vendor specified in the Provider Profile Key field in the eCommerce item. After the payment vendor processes the transaction, Advise records an event order to track the transaction and facilitate the collection of reporting fees. If a registration includes guests, Advise links event orders to the parent event participant. Additionally, you can manually create an event order to track the collection of event fees, for example, through a check or cash.

- For event orders that come from the constituent experience Advise sends the total event fees and purchaser information to the Ellucian Payment Gateway to complete the transaction.

- You cannot change the event participants associated with a system-generated event order, including the parent relationship to guests.
- If an event participant cancels, Advise updates the Number of Registrants field but not the Total Event Fees field because the fee already processed. Advise does create a task for the event owner indicating that there was a change to the number of registrants associated with the order and that a refund may be necessary. If you issue a refund, you should update the Total Event Fees.
- If you manually create an event order in Advise, you must create the event participant first with a registration status of Confirmed to avoid skewed reporting. If event participants have any registration status other than Confirmed, even if associated with an order, Advise does not count them in the Number of Registrants field. You should also create guests of the participant first so that the total number of participants and total fees auto populate correctly.
- Be careful when you make changes to manually-created event orders to ensure that the event participants associated with the event order are correct.
- You cannot add guests to a system-generated event order, because you can have only one eCommerce transaction associated with a system-generated event order.

Create a CRM Event order manually

Manually create a CRM Event order and specify its attributes.

About this task

If you have elected to enable fee collection for CRM events, usually constituents will create event orders through the constituent experience when they register for events with an eCommerce item. However, there may be cases for which you want to manually create an event order for a constituent. Examples include when you are waiving event fees, collecting fees by cash or check, or when a constituent needs assistance registering.

Make sure you create an event participant record to associate with an event order before you create the event order itself. You cannot create an event order without associating it with an event participant who is the event order purchaser. Additionally, you should create all guests and associate them with the event purchaser before you create the event order. You can associate a participant and the participant's guests with one order only, though there is no direct link between the guests and the event order.

After you create an event order, it will be visible in Advanced Find or on the event participant record of the purchaser.

Procedure

1. Go to Advancement > Events.
2. Open the event for which you want to create an event order.
   It must be an event with a linked eCommerce item in the Event Fees section.
3. Select the applicable event participant. If necessary, create a new event participant and any guest participants.

4. On the Event Participant: CRM Event Participant form, Event Order tab, click Add New Event Order record ➕.
   Advise populates all fields except eCommerce Transaction and Description.
5. In the Payment Type field, change the payment method, if necessary.
6. Optional: If you have an eCommerce transaction with an authorization number, select it in the eCommerce Transaction field.
7. Optional: In the Description field, enter any comments about the event order.
   For example, if you waive the fees for a VIP guest, enter an explanation.
8. In the Total Event Fees field, change the amount, if necessary.
9. Click Save.

View credit card event orders without an authorization code

From Advanced Find, view credit card event orders that do not have an authorization code so that you can research and resolve any issues.

About this task

System-generated orders come from registrations made through the constituent experience after processing the event fees with the payment vendor. In the unlikely event there is a communication problem between the payment gateway and Advise, the system shows a registration without an authorization number on a system-generated order. These are registrations for which participants successfully paid the vendor but for which Advise does not have an authorization number. To facilitate investigation into these registrations, there is a view called Credit Card Orders missing Authorizations on the Event Order entity.

Procedure

1. On the navigation bar, click Advanced Find.
2. In the Look for field, select Event Orders.
3. In the Use Saved View field, select Credit Card Orders Missing Authorization.
4. Click Results.

What to do next

If you get an authorization number from the vendor for an order, you can enter it in the linked eCommerce transaction record and change the status to Charge Succeeded.

Manage CRM Event participants

Add an event participant, view the list of registered participants, modify participant details.

Add a participant to a CRM Event

Add a participant to a CRM Event if, for example, you want to add a guest speaker or institution staff without constituent experience accounts.

About this task

Typically, constituents use the constituent experience to register for an event. If a constituent cannot use the constituent experience to register, you can manually add the participant record for the person or organization.

Note: If you use this mechanism to add a participant record, Advise does not copy the contact information to the related person's profile. If you receive updated contact information, you should manually update the person's profile.

Note: If you receive updated contact information, you should manually update the person's profile.

Procedure

1. Go to Advancement > Events.
2. Go to Communications > Events.
3. In the drop-down list of views, select Active CRM Events.
4. In the drop-down list of views, select Active Events.
5. In the list, select the event to which you want to add the person or organization as a participant.
6. In the list, select the event to which you want to add the person as a participant.
7. On the Related Data tab, click Event Participants.
8. In the Event Participants section, click Add Event Participant record .
9. On the New Event Participant form, in the Person or Organization field, enter the name of the person or organization to which the event participation applies.

   Advise defaults the person's first and last name from the person record into the event participation record.
   If the person or organization exists in Advise, you can use these fields to link the participant record to an existing person or organization. If the person or organization does not exist in Advise, or if you do not want to link the participation record to an existing person or organization, you can use the Participant Information section to add the name information. If you use the Participant Information section to add the name information, at the minimum, you must enter the participant's last name.

   The name of the event displays in the Event field. You cannot modify this value.
10. On the New Event Participant form, in the Person field, enter the name of the person to which the event participation applies.

    Advise defaults the person's first and last name from the person record into the event participation record.

If the person exists in Advise, you can use this field to link the participant record to an existing person. If the person does not exist in Advise, or if you do not want to link the participation record to an existing person, you can use the Participant Information section to add the name information. If you use the Participant Information section to add the name information, at the minimum, you must enter the participant's last name.

The name of the event displays in the Event field. You cannot modify event participant information.

11. Optional: On the New Event Participant form, in the Contact or Account or Lead field, enter the name of the contact or account or lead, respectively.
    If the person or organization exists in Advise, you can use these fields to link the participant record to an existing person or organization. If the person or organization does not exist in Advise, or if you do not want to link the participation record to an existing person or organization, you can use the Participant Information section to add the name information. If you use the Participant Information section to add the name information, at the minimum, you must enter the participant's last name.

    The name of the event displays in the Event field. You cannot modify this value.
12. In the Participant Information and Attendance Information sections, enter the participant's contact information and additional fields as necessary.
    If the Registration Status is set to Pending or Canceled, Advise does not include the registration in the event's registration statistics. Additionally, the invitation status defaults to Walk-Up Registration instead of Manual Registration. You can modify this default value.
    If the Registration Status is set to Pending or Canceled, Advise does not include the registration in the event's registration statistics.
13. In the Address Information section, enter the participant's address.
14. Click Save.
15. If the participant is bringing a guest, in the Guest Participants section, click Add Event Participant record, add the guest participant record, and then click Save.
    Advise defaults the parent participant record when you add a guest from the parent record. You can add a guest to a parent by entering a new record and then entering a parent link. A participant cannot be a guest of a guest.
    After you manually add the event participant record and any guests, Advise updates the statistics on the event.

View the participant list for a CRM Event

View the participant list for a CRM Event and see which people and organizations are registered for the event.

Procedure

1. Go to Advancement > Events.
2. In the drop-down list of views, select Active CRM Events.
3. In the drop-down list of views, select Active CRM Events.
4. In the list, select the event that contains the participant list that you want to view.
5. On the Related Data tab, click Event Participants.

6. In the Event Participants list, view the list of registered participants or click See the records associated with this view to open the associated view.

   Tip: You can use the Search field above the participant list to locate a specific registration record.

View the participant list for a CRM Event

View the participant list for a CRM Event and see which people are registered for the event.

Procedure

1. Go to Communications > Events.
2. In the list, select the event that contains the participant list that you want to view.
3. In the Event Participants list, view the list of registered participants or click See the records associated with this view to open the associated view.

   Tip: You can use the Search field above the participant list to locate a specific registration record.

Constituent Ellucian Experience and CRM Events

When you enable CRM Events for use with the constituent experience, students can view events, register for events, cancel an event registration, and view a list of their events.

When you enable CRM Events for use with the Ellucian Experience, students can view events, register for events, and cancel an event registration.

CRM Event registrations

The constituent experience allows students to register for events that meet specific criteria.

Whether a student can use the constituent experience to register for an event depends on the following factors. An event must meet all of the criteria.

- The event must contain a status of Open. The event form contains a field named Event Status. By default, the Event Status field contains a status of Draft, which means you are in the initial stages of creating the event. An event with this status does not display in the constituent experience. After you have completed your internal review of the event and you are ready to display the event on the constituent experience, you can set the status of the event to Open.
- The Display in Constituent Experience field on the event must contain a value of Yes. If the value is No, the event does not display in the constituent experience.
- The Registration Required field on the event must contain a value of Yes. If it does not, students still see the event, but the register button does not appear.

- Today's date must be before the register before date on the event. When today's date is on or after the register before date, students cannot register.
- The event must not have reached the amount specified in the Maximum Capacity field. If the event has reached capacity, a student cannot register.

Constituent experience and CRM Events

When you enable CRM Events for use with the constituent experience, users can search for events, register for events, cancel an event registration, view a list of their events, and integrate their list of upcoming events with their personal calendar through an ICS file that they can download from the constituent experience.

CRM Event searches

The constituent experience allows constituents to search for events that meet specific criteria.

Whether an event displays to users of the constituent experience depends on the following factors. An event must meet all of the criteria to display to users in the constituent experience.

- You must enable the search functionality for the type of event. The Event Type validation list contains a field named Show in Search. If you create an Event Type and set the value in this field to Yes, each event that you associate with the Event Type displays to constituents who use the constituent experience to search for events. For example, if you use the Validation List Management form to create an Event Type named Alumni Events, and you set the Show in Search field to Yes, and you subsequently create an event named Homecoming Weekend, when you enter Alumni Event in the Event Type field for the Homecoming Weekend event, the Homecoming Event displays to users in the search results of the constituent experience.
- The Event must contain a status of Open. The Event form contains a field named Event Status. By default, the Event Status field contains a status of Draft, which means you are in the initial stages of creating the event. An event with this status does not display in the constituent experience. After you have completed your internal review of the event and you are ready to display the event on the constituent experience, you can set the status of the event to Open.
- The Display in Constituent Experience field on the event must contain a value of Yes. If the Display in Constituent Experience field contains a value of No, the event does not display in search results.
- The event must not have an Event Location of No Location, which is a system reserved value.
- A user can include any of the following information in the search to locate an event:
  - Event Name
  - Date From and Date To
  - Event Type
  - On/Off Campus
  - Event Location
  - Postal Code / Distance

Note: For events that occur online, you should consider what information you have added to the Event Location and how users can locate the event through the search.

For example, a user cannot use postal code information to search for an event that does not have an address.

CRM Event registrations

The constituent experience allows constituents to register for events that meet specific criteria.

Whether a constituent can use the constituent experience to register for an event depends on the following factors. An event must meet all of the criteria before a constituent can use the constituent experience to register for an event. If an event does not meet all of the criteria, constituents cannot register for the event.

- The event must contain a status of Open. The Event form contains a field named Event Status. By default, the Event Status field contains a status of Draft, which means you are in the initial stages of creating the event. An event with this status does not display in the constituent experience. After you have completed your internal review of the event and you are ready to display the event on the constituent experience, you can set the status of the event to Open.
- The Display in Constituent Experience field on the event must contain a value of Yes unless the registrant has the Event URL. If the Display in Constituent Experience field contains a value of No, the event does not display in constituent experience. A participant can register for a private event even if this indicator is No.
- The Allow Registration field on the event must contain a value of Yes.
- The registration date on the event must be today's date or a future date. The registration date cannot be in the past.
- The event must not have reached the amount specified in the Maximum Capacity field. If the event has reached it's capacity, a user cannot register. The constituent experience displays a status of Event Full.
- If the Start Date and End Date for the event are not the same because the event occurs over multiple days, a user can register beyond the Start Date. For an event that occurs over multiple days, users can register after the Start Date unless the Registration Date and the Start Date are the same.

Filtered list of CRM Events

You can create a filtered list of CRM Events and then distribute the list to a targeted group of people or organizations.

Create a filtered list of CRM Events

Create a list of events that meets specific criteria, and then distribute the list to a targeted group of people and organizations.

Before you begin

You must have entered a value in the Filtered Events View URL setting before you can create a filtered list of CRM Events.

About this task

When you create a filtered list of events, you use the native Microsoft Dynamics 365 functionality to create and manage a query that contains filter criteria. After you create a managed query, Advise generates a URL for the filtered list, which you can distribute to a targeted group of people and organizations. When you enter the URL in a browser, you can view a list of events that meet the list's criteria.

For example, you can create a filtered list that contains upcoming athletic events in a specific geographic region. You can then distribute the URL to people and organizations who live in the area to let them know about upcoming athletic events in their area. You can also create a filtered list of private events, and then distribute the URL to a select group of people or organizations to ensure they can view the events. When you combine the power of a filtered list of private events and the constituent experience settings on an event, you can prevent an event from displaying in the constituent experience and prevent constituents from finding a private event through the event search feature. Only constituents who have access to the URL for the filtered list can view the details of each event in the list and register for an event in the list.

Procedure

1. Go to Advancement > Filtered Event Views.
2. Click New.
3. In the Name field, enter a name that uniquely identifies the list.
4. Optional: In the Show Future Events Only field, indicate whether you want to only include events that have a future start date.

Option	Description
Yes (default)	Select this value if you want the list to only include events that have today's date or a future start date.
No	Select this value if you want the list to include all events that meet the list's criteria, regardless of the event's start date.

5. In the Internal Description field, enter a description that your institution can use to identify the filter.
   This description does not appear in the constituent experience.
6. In the Detailed Description field, enter the name of the list, which displays to users in the constituent experience.
7. Click Save.
8. Specify the criteria for the filter.
   For example, create a filter that includes all upcoming athletic events, or a filter that includes all private events based on a specific event type.
   a) On the command bar, click More Commands , and then click Manage Query.
   b) In the Fields field, select the field that you want to filter.
      For example, if you want to include a specific type of event, select Event Type.

c) In the Operator field, specify the operator.

For example, if you want to include events of a specific type, select Equals.

d) In the Value field, specify the value that you want to include in the query.

For example, if you want to include athletic events in the query, select an event type that identifies your athletic events.

e) Click Use Query.

Advise closes the Manage Query form and displays the Filtered Event View.

9. Refresh or close and then re-open the Filtered Event View.
Advise displays a URL in the URL field.
10. Copy the URL from the URL field and paste it into your browser.
The Filtered Events page displays in the constituent experience and you can view a list of events that meet the filter's criteria.

    Warning! The value in the ExternalSiteFilteredEventView configuration setting determines the site in which the list of filtered events displays. If you want to target a list of filtered events for display in a specific site, your configuration setting should match the site to which the list of events applies. You should modify the configuration setting as often as necessary, and before you generate the URL for a filtered list to ensure the accuracy of each URL. Failure to adhere to this rule can result in a list of events for one site with the formatting and appearance of a different site.
11. Review the list of events and confirm that it is accurate.

What to do next

You can now use your communication method of choice to distribute the URL in step 10 to your constituents or a targeted group of people or organizations.

Tip: If you want to track the location from which a user originated when the user clicks the link, you can add UTM codes to your filtered list of events.

View filtered CRM Events

View filtered CRM Events to understand what criteria Advise uses to build the filtered list.

Procedure

1. Go to Advancement > Filtered Event Views.
2. In the list, select the filtered event list that you want to view.
3. On the Filtered Event form, view the filter's details.
4. On the command bar, click More Commands ••• , click Manage Query, and then view the list's filter criteria.

    Tip: The URL for the filtered list displays in the URL field. If you want to distribute the filtered list to people or organizations, you can copy the URL and then distribute it as necessary.

Document Management

Add a document to student profile

You can attach documents to a student's profile. If your institution uses a document management system, attachments will upload to it. Documents sent from Advise exist in the B-A-CRM-ADVISE folder in document management.

Procedure

1. Go to one of the following locations:
   - Advisors > My Students
   - Case Managers > My Students
   - Managers > High-Risk Students
2. In the list, open the student whose record you want to view.
3. In the Notes section, enter a note title and description, if desired.
4. Click Attach, then click Browse to search for and select the file.
5. Click Done to attach the file.

   Note: If you are not able to see the documents under Document section, click Refresh.

Result

The file will be attached to the student record. If you are using a document management system, the file should be uploaded to the system. You will be able to access it from the Document section.

Add a document to alert

You can add documents to an alert. If your institution uses a document management system, attachments will upload to it. Documents sent from Advise exist in the B-A-CRM-ADVISE folder in document management.

Procedure

1. Go to one of the following locations:
   - Advisors > Alerts
   - Managers > Alerts
2. Open the alerts for which you want to add a document.

3. In the Notes section, enter a note title and description, if desired.
4. Click Attach, then click Browse to search for and select the file.
5. Click Done to attach the file.

   Note: If you are not able to see the documents under Document section, click Refresh.

Result

The file will be attached to the alert. If you are using a document management system, the file should be uploaded to the system. You will be able to access it from the Documents section.

Add a document to case

You can add documents to case from Case Managers. If your institution uses a document management system, attachments will upload to it. Documents sent from Advise exist in the B-A-CRM-ADVISE folder in document management.

Procedure

1. Go to Case Managers > Manage Cases
2. Open the case for which you want to add a document.
3. In the Notes section, enter a note title and description, if desired.
4. Click Attach, then click Browse to search for and select the file.
5. Click Done to attach the file.

   Note: If you are not able to see the documents under Document section, click Refresh. If it still does not appear, there might have been an issue with the upload. The document should be uploaded the next time the Send Documents to Ellucian Document Management workflow runs.

Result

The file will be attached to the case. If you are using a document management system, the file should be uploaded to the system. You will be able to access it from the Documents section.

United Kingdom version of Advise

If you are using the United Kingdom version of Advise, please note that there are terminology differences.

United States Term	United Kingdom Term
catalog	catalogue
cutoff	cut-off
enrollment	enrolment
keyblock	key block
labor	labour
program	programme
readonly	read-only
organization	organisation
customize	customise
customization	customisation
synchronize	synchronise
realize	realise
analyze	analyse
authorize	authorise
recognize	recognise
optimize	optimise
finalize	finalise
state	region
zip	post code
#	No
advisor	tutor
advising	tutoring
course	module