Updated February 2019

How to Create and Publish Advisory Services Panel reports

Contents

Procedure 1: Add an Advisory Services Panel in netFORUM **1**

Step A: Create Advisory Services Panel 1

Step B: Enter panel members 1

Step C: Add a location for the ASP event 3

Step D: Add keywords for your ASP event 4

Procedure 2: Add Invoice and Contract **6**

Step A: Create invoices (if needed) 6

Step B: Attach a contract (if needed) 7

Procedure 3: Publish ASP to knowledge.uli.org **11**

Appendix Item 1—Keywords **13**

Appendix Item 2—How to choose keywords for ASPs **14**

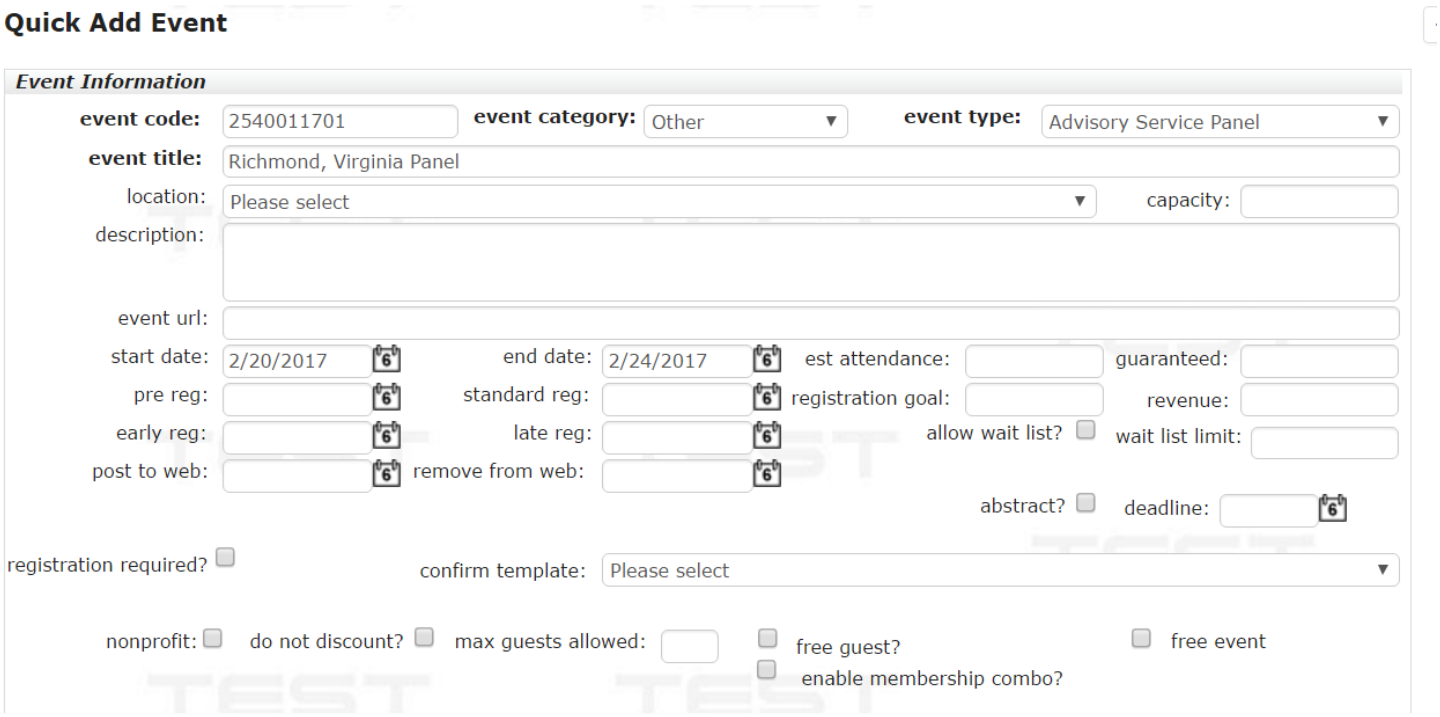
Appendix 3—Publish to Knowledge Finder Checklist **14**

Appendix Item 4—Sample Published TAP on knowledge.uli.org **15**

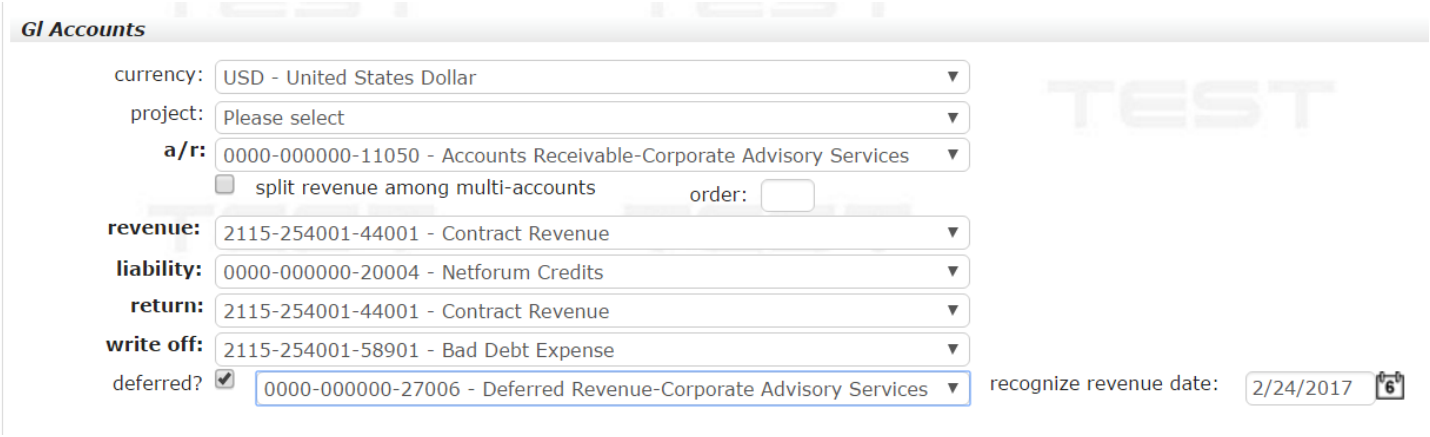
Procedure 1: Add an Advisory Services Panel in netFORUM

Step A: Create Advisory Services Panel

1. Go to Events module and create Advisory Panel.
2. Set up Event information for the ASP
    a. Meeting code: 25400117xx (01, 02, etc.)
    b. Event category: Other
    c. Event Type: Advisory Service Panel
    d. Title: [Location of Advisory Service Panel] e.g., Downtown Grand Forks, North Dakota
    e. Description: [subtitle], e.g. A Strategy for Rebuilding Downtown Grand Forks
    f. Start and End dates:
    g. GL accounts as below



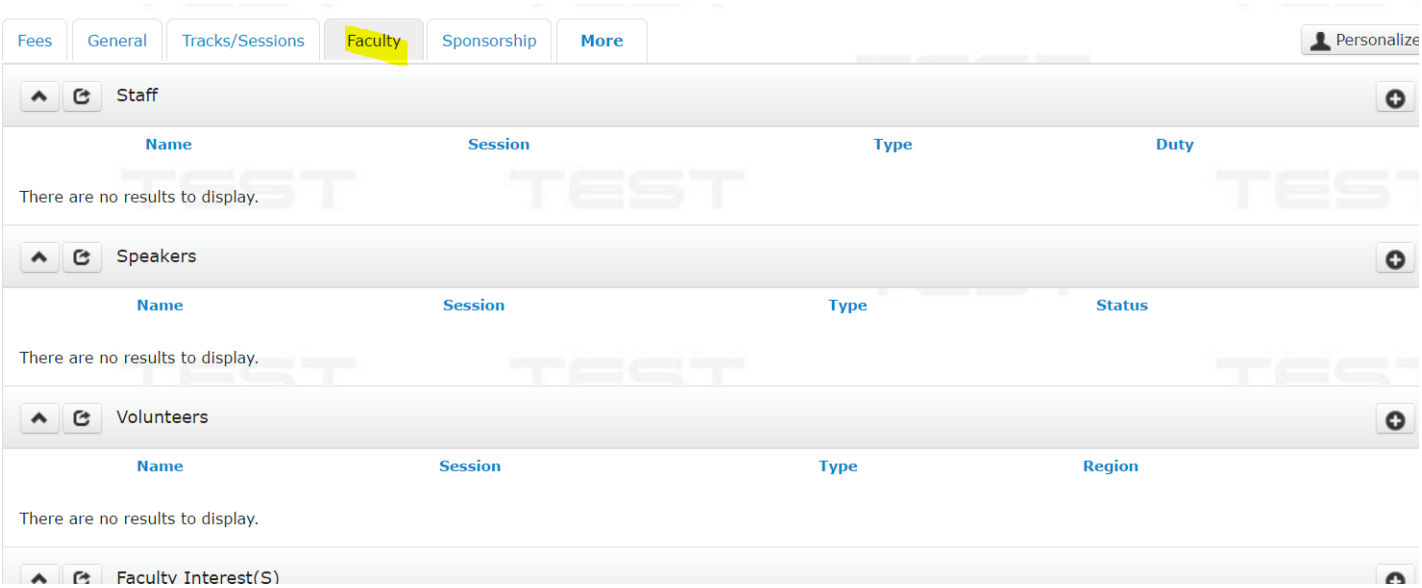
Add G/L accounts:



Click save.

Step B: Enter panel members

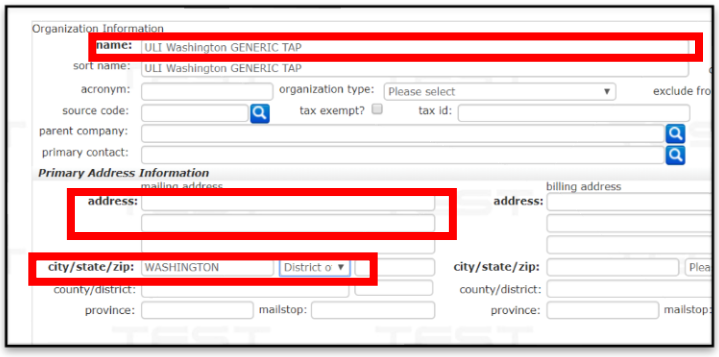
1. Go to Faculty tab to add Panel members.



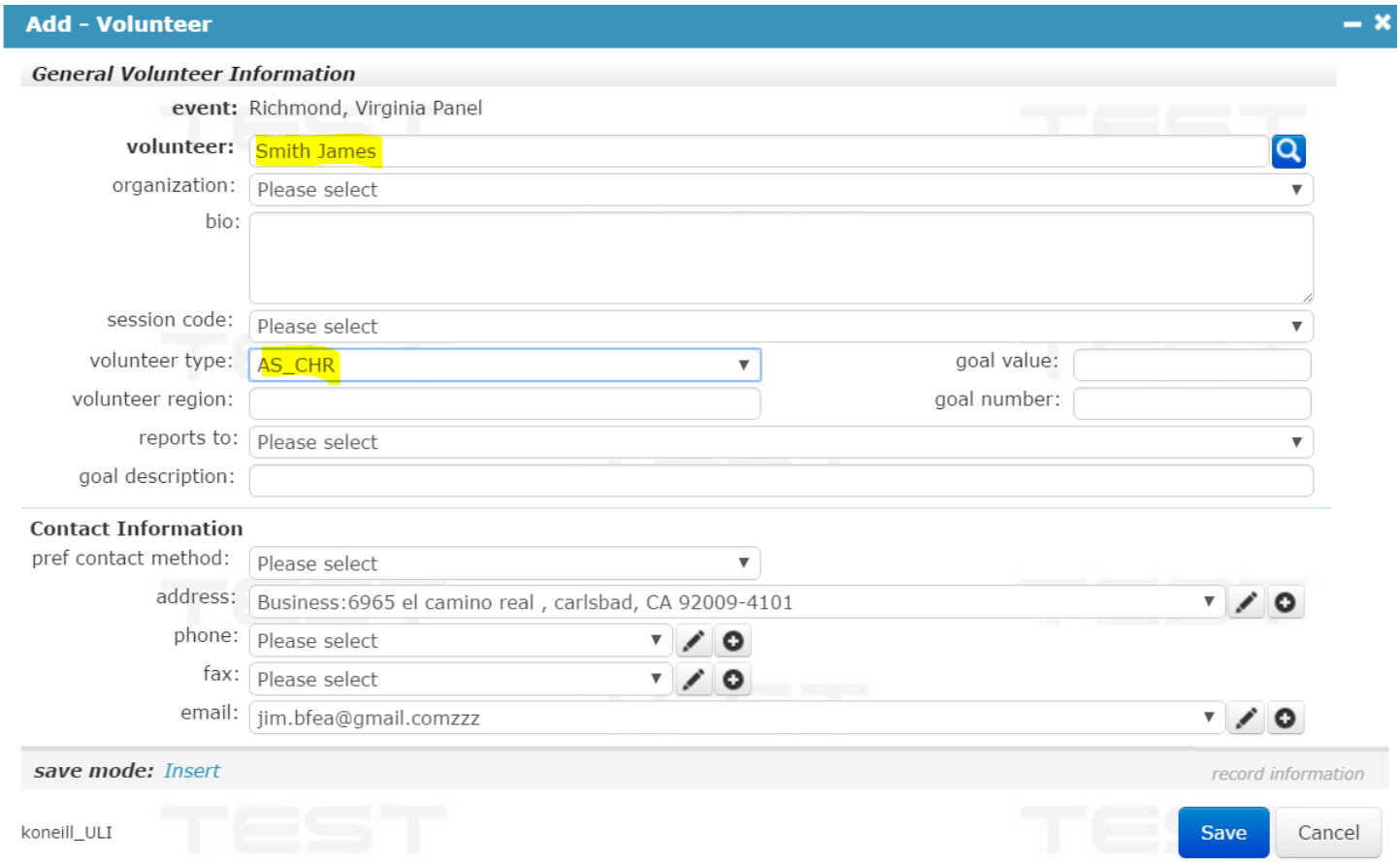
2. Click + next to Volunteers. Add name and volunteer type. Click Save.

Step C: Add a location for the ASP event

1. ASP reports must be assigned a City, State location
    a. **Note: You will need to add your ASP location to the database through the CRM module. Refer to Add an Organization documentation.**
2. ASP organization/location can be entered in the CRM module without the all the typical required fields.
    a. Add the ASP report as an organization



    b. For the Organization Information a street address is necessary, enter the **ASP report name**, **City**, and **State**
3. Click Save and the ASP organization information is now complete. You will see a new screen with your ASP organization.

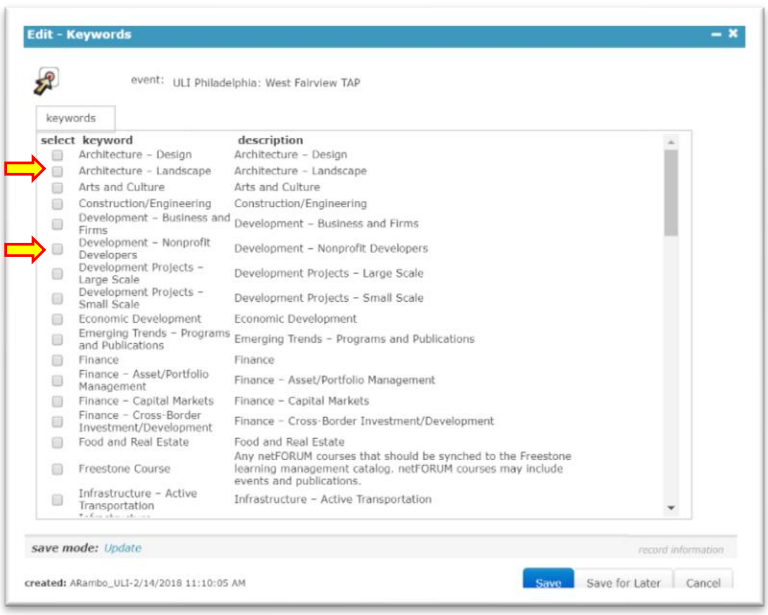


Step D: Add keywords for your ASP event

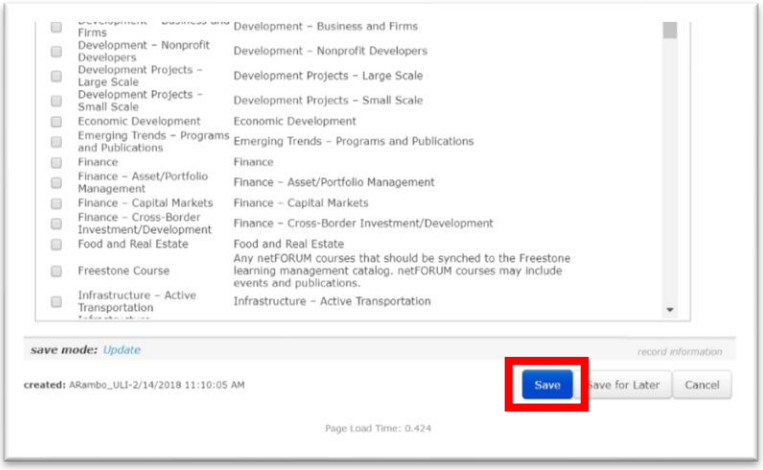
Keywords are used in netForum to categorize ASP reports for Knowledge Finder.

1. Click on the keywords button on the event page

2. Select keyword(s) based on the topic(s) of your ASP report



3. Click save, the box will automatically close

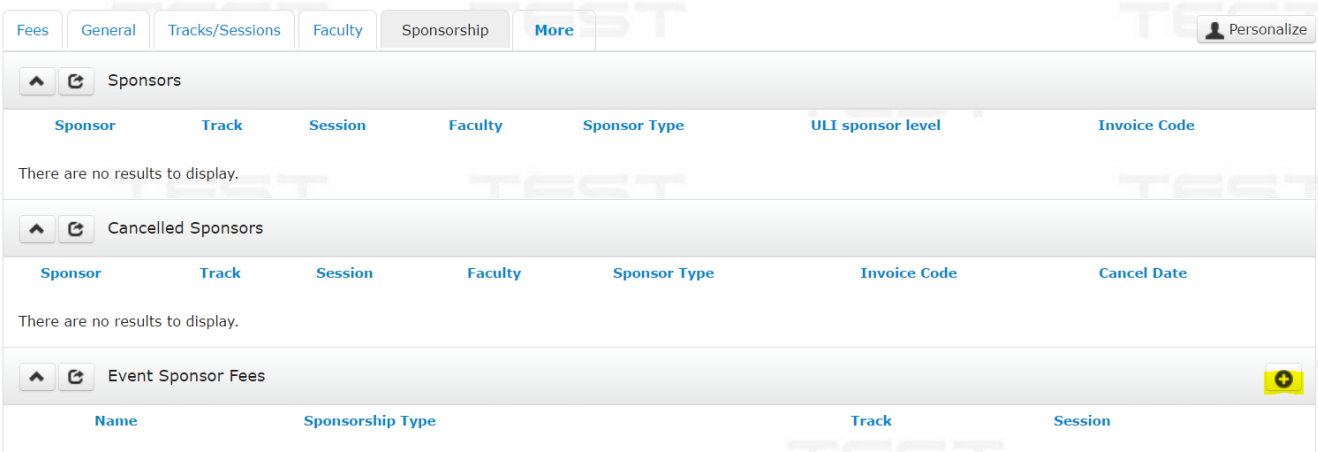

Development – Business and Firms
Development – Nonprofit Developers
Development Projects – Large Scale
Development Projects – Small Scale
Economic Development
Emerging Trends – Programs and Publications
Finance
Finance – Asset/Portfolio Management
Finance – Capital Markets
Finance – Cross-Border Investment/Development
Food and Real Estate
Freestone Course
Any netFORUM courses that should be synched to the Freestone learning management catalog. netFORUM courses may include events and publications.
Infrastructure – Active Transportation
save mode: Update
record information
created: ARambo_ULI-2/14/2018 11:10:05 AM
Save
Save for Later
Cancel
Page Load Time: 0.424

ULI Washington GENERIC TAP
Attn:
ULI Washington GENERIC TAP
WASHINGTON, DC
Phone:
Fax:
preference:
Business
receives benefits?
member flag?
Custom Info
Additional Information
org id: 001013512O
acronym:
org type:
parent:
addr type: Business
tax id:
e-mail:
source:
score:
edit name & address
edit contact info
Web Login
Demographics
User Defined Demographics
invoice
add membership
add chapter membership
add corp package
add payment
mass payment
add event sponsorship
exhibitor
find individuals

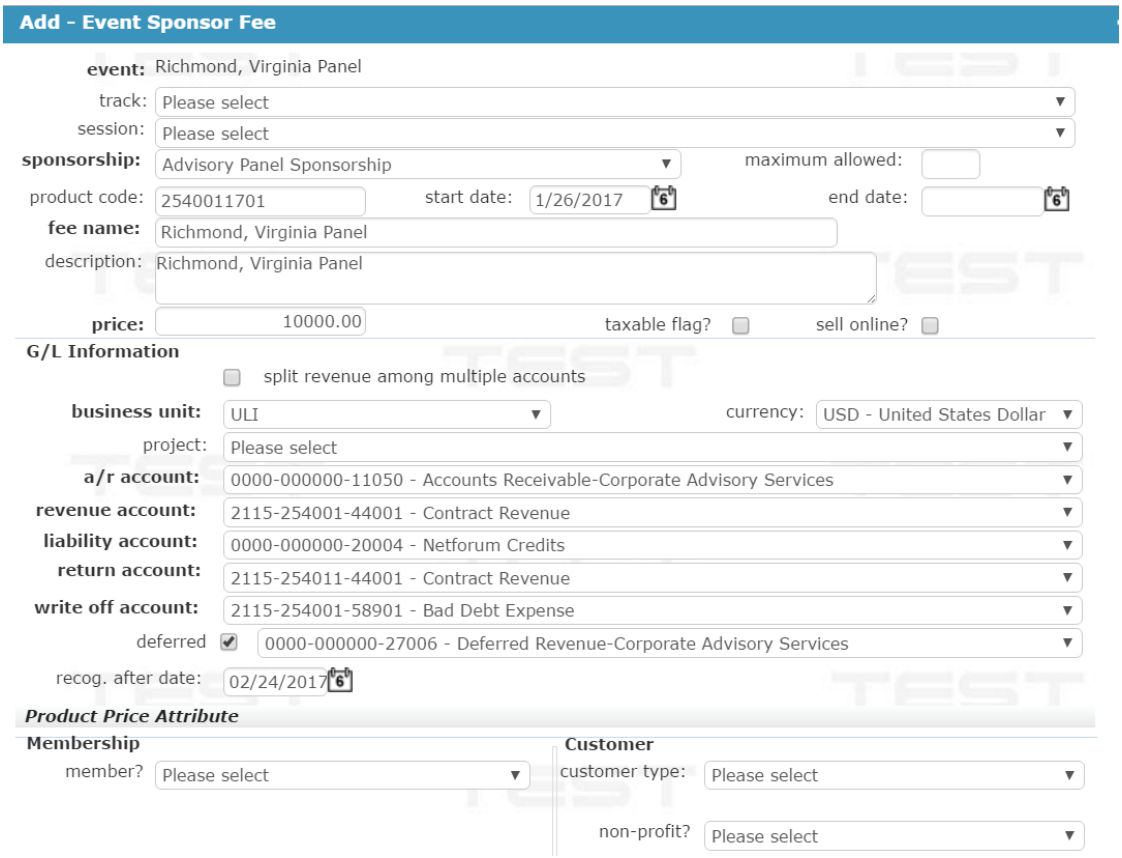
Procedure 2: Add Invoice and Contract

Step A: Create invoices (if needed)

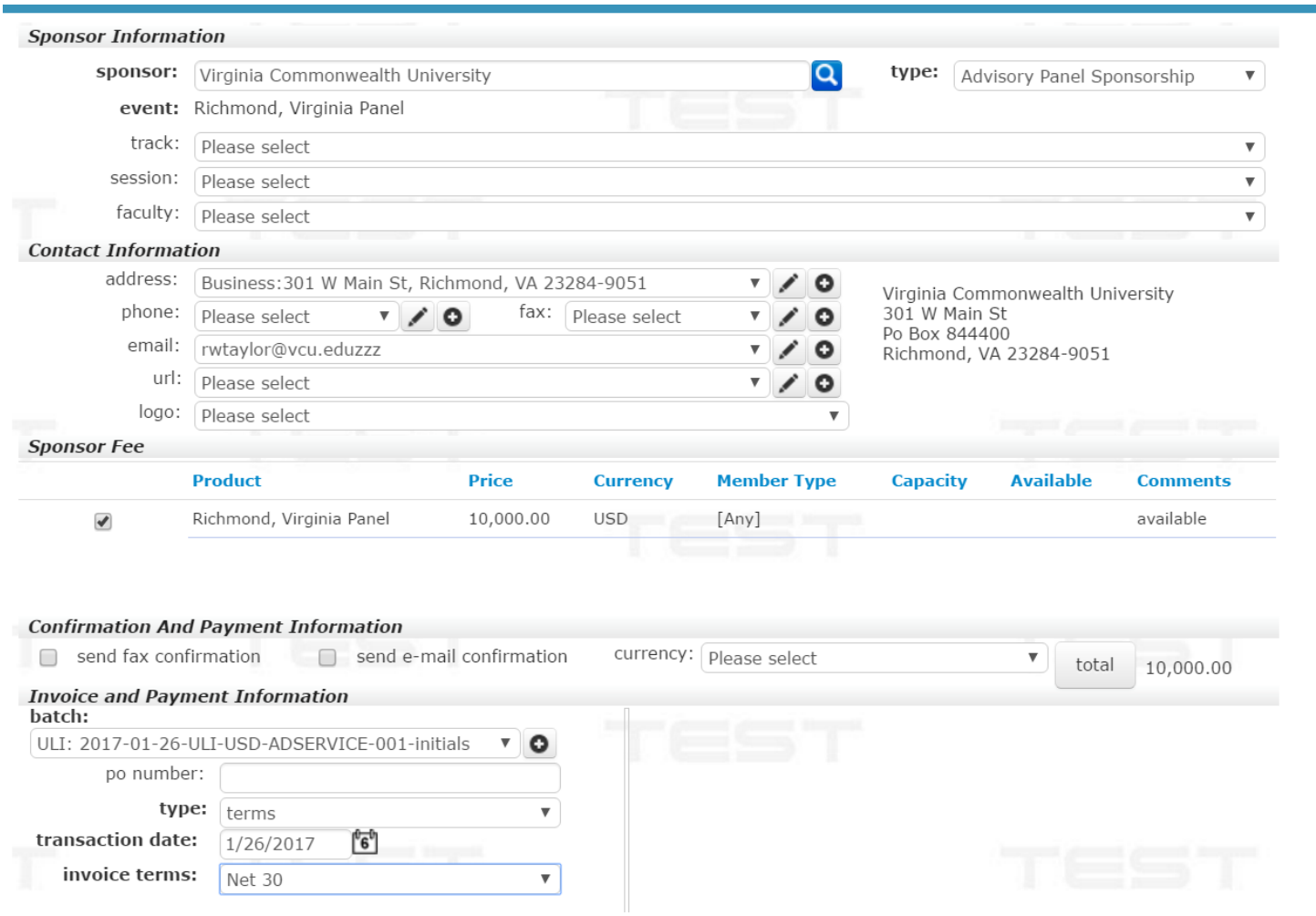
1. Go to Sponsorship tab.
2. Click + next to event sponsor fees. You can add multiple sponsor types.



3. Complete:
   a. Sponsorship drop down
   b. Price: enter fee
   c. Project: event code
   d. G/L accounts as below

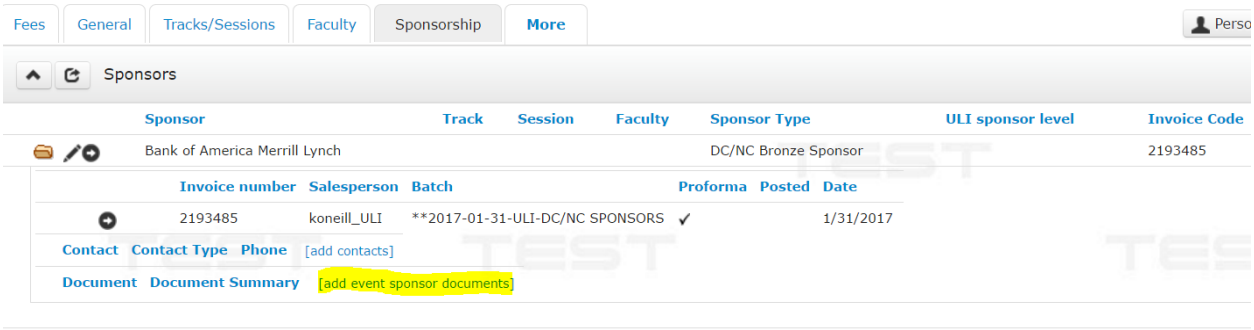


4. Add Event Sponsor from the “Sponsor” icon.
    a. Select organization (must be in NF)
    b. Select Type from drop down
    c. Check box next to sponsor fee
    d. Create batch. Transaction date can be edited.

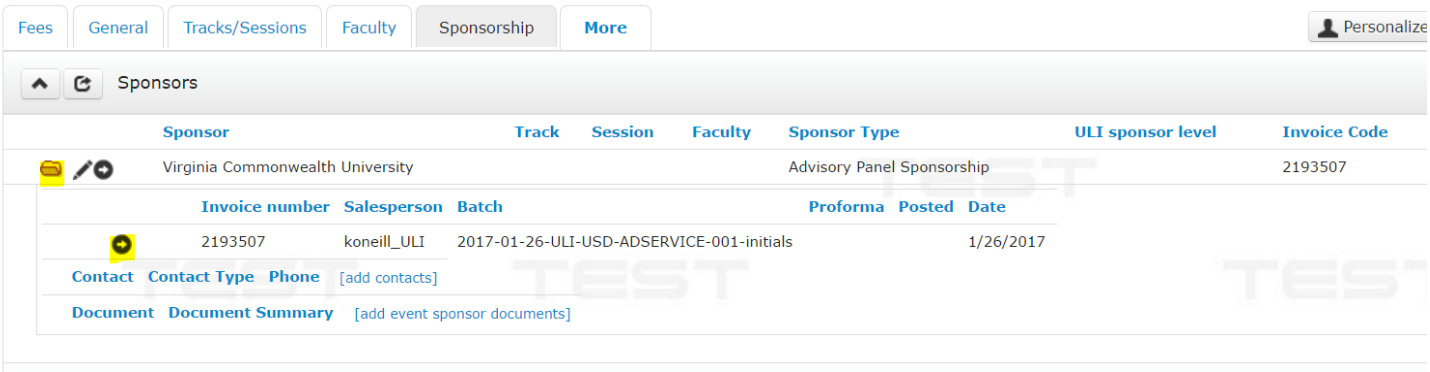


Step B: Attach a contract (if needed)

1. Open folder “add event sponsor document”.

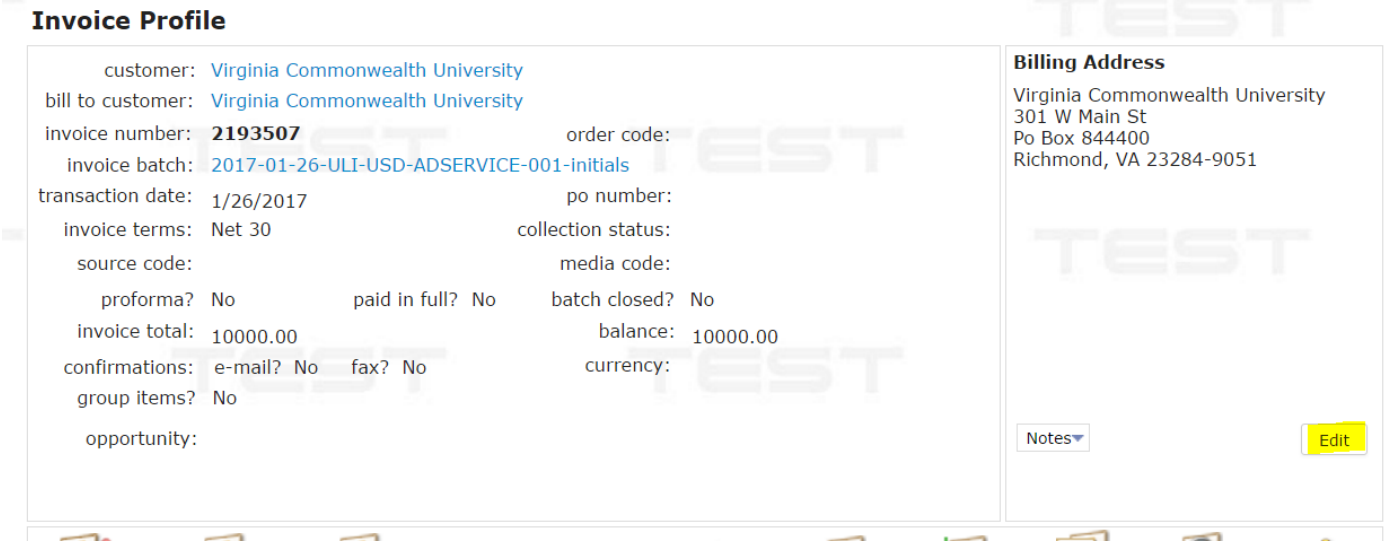


2. To print invoice, click on child form next to sponsor and click on arrow next to invoice.



3. To add information on the invoice, click edit.

4. Add information in external notes section and click save.



Edit - Invoice

Invoice Detail

customer: Virginia Commonwealth University
bill to customer: Virginia Commonwealth University
billing contact: Please select
address: Virginia Commonwealth University 301 W Main St Po Box 844400 Richmond, VA 23284-9051
invoice number: **2193507**
invoice batch: ULI: 2017-01-26-ULI-USD-ADSERVICE-001-initials
transaction date: 1/26/2017
po number:
invoice terms: Net 30
source code:
media code: Please select
tracking number:
collection status: Please select
invoice total: 10000.00
invoice balance: 10000.00
group items?
invoice group description:
opportunity: Please select
close opportunity?

e-mail confirmation sent? No
fax confirmation sent? No
paid in full? No
batch closed? No

Notes

external:
First installment

internal:

save mode: *Update*

record information

created: koneill_ULI-1/26/2017 1:42:42 PM

Save Cancel

5. Click on the reports tab to download invoice with ULI format.

Invoice Profile

customer: Virginia Commonwealth University
bill to customer: Virginia Commonwealth University
invoice number: **2193507**
order code:
invoice batch: 2017-01-26-ULI-USD-ADSERVICE-001-initials
transaction date: 1/26/2017
po number:
invoice terms: Net 30
collection status:
source code:
media code:
proforma? No
paid in full? No
batch closed? No
invoice total: 10000.00
balance: 10000.00
confirmations: e-mail? No fax? No
currency:
group items? No
opportunity:

Billing Address

Virginia Commonwealth University
301 W Main St
Po Box 844400
Richmond, VA 23284-9051

Notes Edit

edit detail | return/cancel | void invoice | add payment | add claim | add line item | list invoice details | find invoice details | installment payments

6. Download invoice as PDF. (Note where the external notes are found on the invoice.)

Urban Land Institute

Urban Land Institute
2001 L Street, NW
Suite 200
Washington, DC 20036
Email: customerservice@uli.org
1-800-321-5011 or 1-410-626-7500

Customer #: 000583120O

Mr. Robert W. Taylor, MAI, SRA
Virginia Commonwealth University
301 W Main St
Po Box 844400
Richmond, VA 23284-9051

Invoice

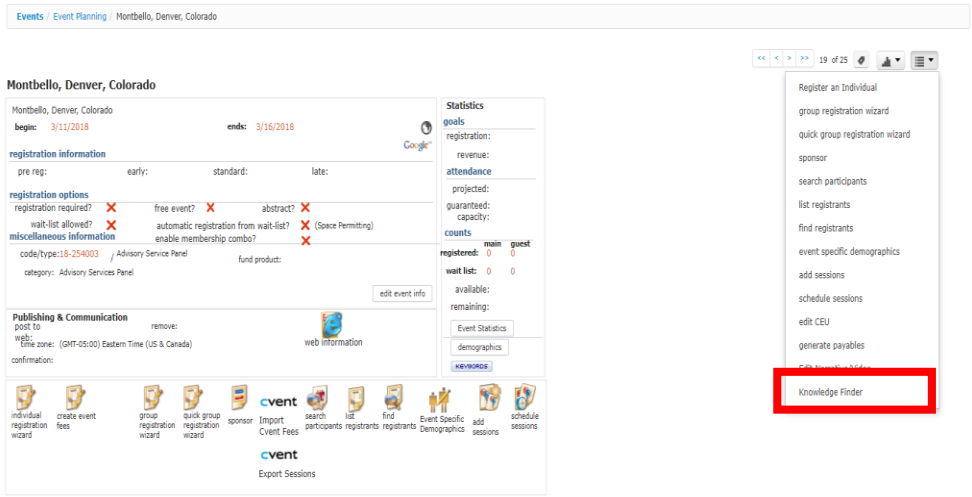
Invoice # : 2193507
Invoice Date: 01/26/2017

Description	Product Code	Quantity	Price	Discount	Amount
Richmond, Virginia Panel	2540011701	1	$10,000.00	$0.00	$10,000.00

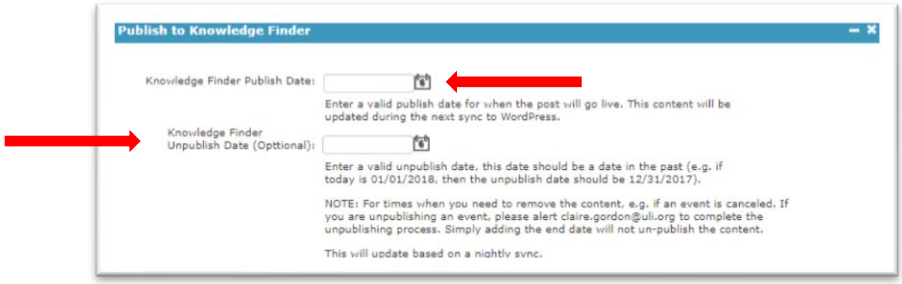
Notes:
First installment

Procedure 3: Publish ASP to knowledge.uli.org

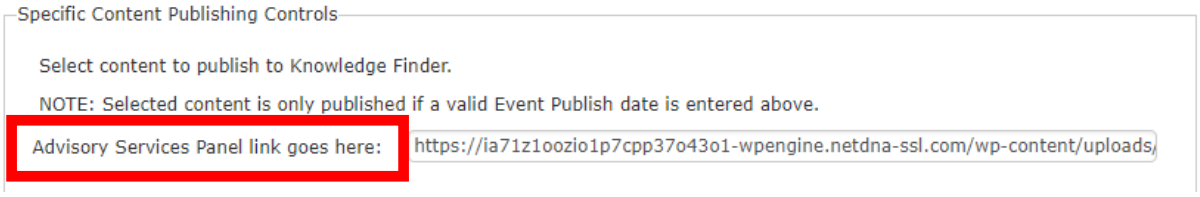
1. Go to your event in netFORUM
2. Click on the three vertical lines in the top right corner and select “Knowledge Finder” in the dropdown menu. This will take you to the Publish to Knowledge Finder screen where you will input publication details.



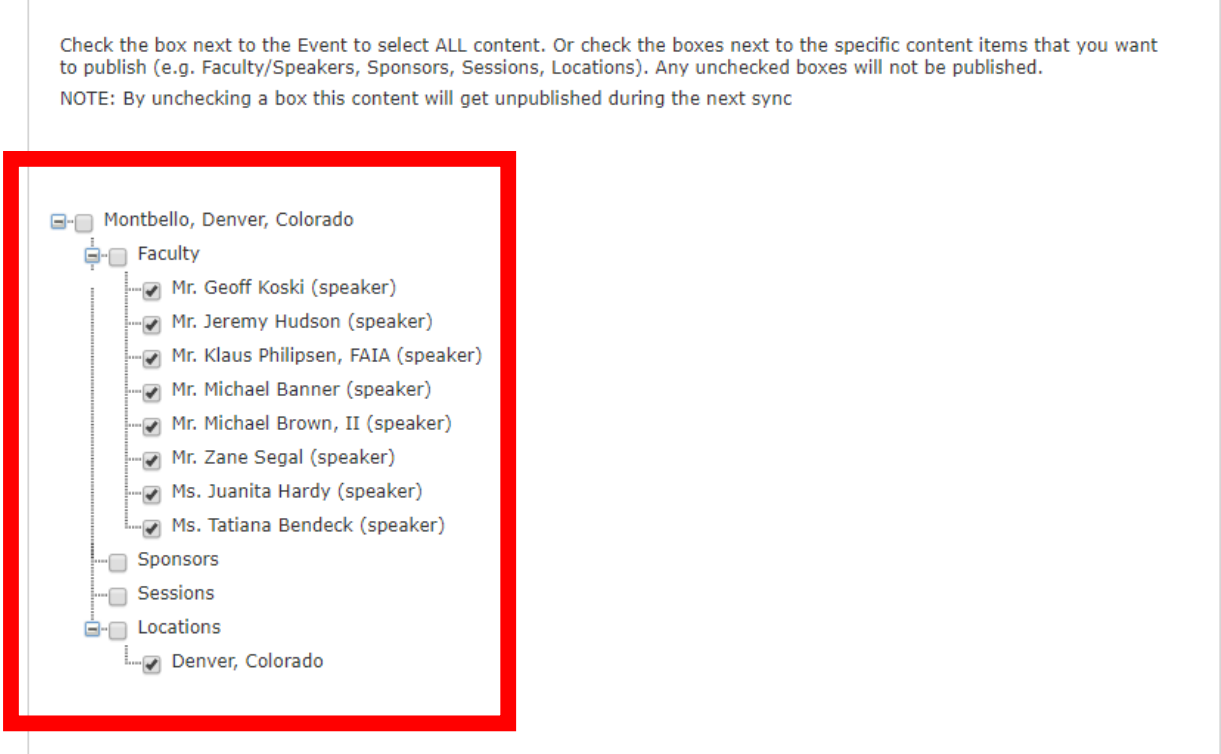
3. On the Publish to Knowledge Finder screen you must enter the following information



   a. Enter the Publish Date (this is when the post will go live)
   b. Optional: Enter the Unpublish date (for times when you need to remove the content, e.g. if an event is canceled. Note: If you are unpublishing an event, please alert claire.gordon@uli.org to complete the unpublishing process. Simply adding the end date will not unpublish the content.)
   c. Paste the Knowledge Finder PDF URL in the field.

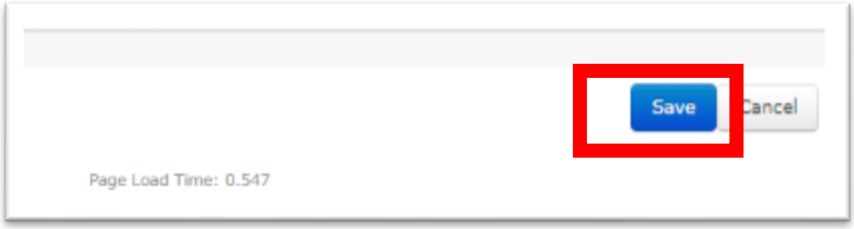


      i. Note: Knowledge Finder requires that your PDF exist on the web with an associated AZURE URL.
      ii. Note: If you require assistance generating an AZURE URL for your report, contact websupport@uli.org.
   d. Select the checkboxes next to the items that you want to publish (e.g. Faculty/Panelists, Sponsors, Sessions, Locations).



i. Note: The following items will be published to knowledge.uli.org: Faculty/Panelists and Location.
ii. Note: Sponsors may be required to be publish to knowledge.uli.org at a later date.
iii. Note: Sessions is not applicable to ASPs

e. Click save



4. After you hit save, the editor for knowledge.uli.org will be alerted—not immediately, but once a day. Note: The editor for knowledge.uli.org is responsible for the final publication of all content and will publish on a rolling (not instantaneous) basis.

Appendix Item 1—Keywords

Architecture – Design
Architecture – Landscape
Arts and Culture
Construction/Engineering
Development – Business and Firms
Development – Nonprofit Developers
Development Projects – Large Scale
Development Projects – Small Scale
Economic Development
Emerging Trends – Programs and Publications
Finance
Finance – Asset/Portfolio Management
Finance – Capital Markets
Finance – Cross-Border Investment/Development
Food and Real Estate
Infrastructure – Active Transportation
Infrastructure – Airports/Rail/Port Facilities
Infrastructure – Parking and Parking Facilities
Infrastructure – Transportation and Transit
Land Use Type/Sector – Health Care/Medical
Land Use Type/Sector – Hospitality – Hotels and Resorts
Land Use Type/Sector – Housing – Active Adult/Senior/Retirement Communities
Land Use Type/Sector – Housing – Affordable/Workforce
Land Use Type/Sector – Housing – Multifamily
Land Use Type/Sector – Housing – Single-Family
Land Use Type/Sector – Housing – Student
Land Use Type/Sector – Industrial
Land Use Type/Sector – Institutions – Libraries and Museums
Land Use Type/Sector – Master-Planned Communities
Land Use Type/Sector – Military Facilities
Land Use Type/Sector – Mixed Use and Multi-Use
Land Use Type/Sector – Office
Land Use Type/Sector – Recreation and Entertainment
Land Use Type/Sector – Retail
Land Use Type/Sector – Stadiums, Arenas, and Venues
Land Use Type/Sector – Universities and Educational Facilities
Land Use Type/Sector – Waterfront
Leadership
Market Conditions – Demographics
Market Conditions – Economy
Market Conditions – Market and Feasibility Analysis
Market Conditions – Market Trends
Market Conditions – Technology, New/Disruptive
Marketing
Open Space
Placemaking
Public Sector – Public Officials
Public Sector – Public/Private Partnerships
Real Estate Law
Land Use Type/Sector – Recreation and Entertainment
Regulations and Zoning
Resilience
Responsible Property Investment
Revitalization/Redevelopment – Adaptive Use/Building Reuse
Revitalization/Redevelopment – Central City
Revitalization/Redevelopment – Downtown
Revitalization/Redevelopment – Healthy Neighborhoods and Corridors
Revitalization/Redevelopment – Historic Preservation
Revitalization/Redevelopment – Infill
Revitalization/Redevelopment – Inner-City Neighborhoods
Revitalization/Redevelopment – Rural
Revitalization/Redevelopment – Suburbs
Sustainable Development
Traditional Neighborhood Development/New Urbanism
Transit-Oriented Development
Universities and Educational Facilities
Urban and Regional Planning

Appendix Item 2—How to choose keywords for ASPs

- Read the executive summary/introduction to get an idea of content theme and/or topic
- Choose at least 6 and up to 8 keywords
- Choose keywords that align with the previously-selected TAP topics
- Always pick land use type/sector, choosing up to 3
- Always pick location type, e.g. Downtown, Suburbs, Central City, Rural

Appendix 3—Publish to Knowledge Finder Checklist

Just because your ASP is in netFORUM doesn't mean that it is ready to be published to Knowledge Finder.

Please make sure that you have completed the key steps!

- Have you built out your ASP with the necessary information?
    - Have you added a location? And ASP name + Subtitle?
    - Is the start and end date correct?
    - Have you assigned keywords?
    - Have you linked faculty and panelists?
- Have you inputted all the publication details, to include:
    - Publish Date (this is when the report will go live, and not the date of the report)
    - Azure URL link for ASP PDF
    - Have you selected the following checkboxes in the publish to Knowledge Finder box? They are: Faculty/Panelists and Location.
    - Have you hit save?

Appendix Item 4—Sample Published TAP on knowledge.uli.org

Wuhan, China: Changjiang New Town

DETAILS

Wuhan

November 30, 2018 - December 4, 2018

View PDF
ADVISORY SERVICE PANEL REPORT

PANELISTS

In Keun Lee
Visiting Professor

Kenneth Rhee
Chief Executive Officer
Huhan Business Advisory (Shanghai) Company Limited

Allen Folks

Paul Doherty
President and Chief Executive Officer

Abel Xu
Director

Billy Grayson
Executive Director, Center for Sustainability and Economic Performance
Urban Land Institute

Chin Beng Yap
Dy CEO (Estates and Corporate)
Housing and Development Board

Sara Queen
Assistant Professor (Adjunct)
Columbia University - MSRED Program, GSAPP

Tom Eitler
Senior Vice President
Urban Land Institute

May Chow
Senior Vice President, Marketing and Communications
ULI Asia Pacific

Kate Bicknell
Oxford Properties Group

David McCracken
Executive Director

RELEVANT TOPICS

Economic Development
Finance
Infrastructure – Active Transportation
Infrastructure – Airports/Rail/Port Facilities
Infrastructure – Transportation and Transit

CONTENT PILLARS

Housing and Communities
Innovation in Development Practice
Real Estate Finance and Investment
Shaping Successful Cities and Regions
Sustainability and Economic Performance