

# How to create and publish a District Council event

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# Procedure 1: Establish a new District Council Event

This section describes the process for establishing a new District Council event.

Once the meeting is entered in NetForum, a request to open a meeting (ROM) must be submitted to DCMeetings with a new event code approved by finance. Finance only requires a meeting date and title to assign code; the code can be requested in advance of preparing your meeting documents.

**Following is an example of the information in the message to Finance:**

I am submitting a Request to Open a Meeting and need approval for:

**Name of Event:**

**Date of Event:**

**The other information you have requested:**

- Was this meeting included in your budget submission? YES
- If it was, what code did you budget it under? XXXX-XXXX

Please let me know if we are okay to proceed.

Thanks,

**DCMeetings requires 24 hours for meeting approval. If there are issues with the set-up, the 24 hours will start again with resubmission of documents.**

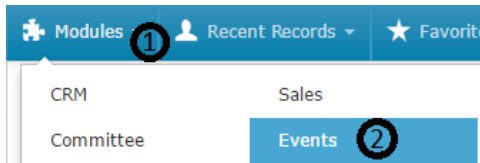
Table registrations and meeting functions (i.e., lunches, tours, promo codes) will be added by a preferred provider or DCMeetings. Please let them know they need to be added.

If your location is not appearing, then it must be added to the database through the CRM module. Refer to Add an Organization documentation.

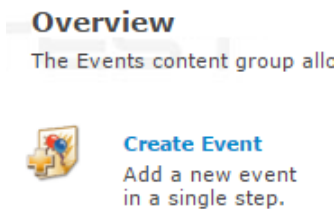
# Procedure 2: Create an Event in netFORUM

## Step A: Set Up Event Information

1. Go to Modules > Events.



2. Under Overview, click on "Create Event."



3. Set up Event Information. *Note: If a field is not mentioned, it should not be completed.*
  - a. **Event Code:** 8-digit meeting code, no hyphen.
  - b. **Event Category:** Member Only, Full Member, District Council, YLG, or one of the other categories that applies to meeting. **Member Only does not restrict non-members from registering; that is done in fee set-up.**
  - c. **Event type:** District Council
  - d. **Event title:** meeting title, always starting with DC name
    - i. **Best practice - limit your title to 100 characters**
  - e. **Capacity:** enter registration limit
  - f. **Start date:** First Date of Event
  - g. **End date:** Last Date of Event
  - h. **Pre reg:** first day of the month when entering
  - i. **Early reg:** end date of early bird registration; if there is no early bird date, enter yesterday's date
  - j. **Standard reg:** **day after regular online registration ends** (If online deadline is later than mail/tel/fax deadline, the online deadline is the one that is entered here.)
  - k. **Late reg:** two months after the event date
  - l. **Post to web/Remove from web:** Leave blank
  - m. **Registration required box:** Always check box
  - n. **Confirmation template:** AW\_DCEventEmailconfirmation :: AW\_DCEventEmailconfirmation.
  - o. **Max guests allowed: 0**

A screenshot of the 'Event Information' form in netFORUM. The form contains various fields for event details. Fields include: event code (12345678), event category (Member Only), event type (District Council), event title (Sample Event), location (Please select), capacity (1000), description, event url, start date (5/15/2017), end date (5/20/2017), est attendance, guaranteed, pre reg (5/1/2017), standard reg (4/30/2017), registration goal, revenue, early reg (3/1/2017), late reg (7/15/2017), allow wait list?, wait list limit, post to web, remove from web, abstract?, deadline, registration required? (checked), confirm template (AW\_DCEventEmailconfirmation :: AW\_DCEventEmailconfirmation), nonprofit?, do not discount?, max guests allowed (0), free guest?, enable membership combo?, and free event.

4. Fill in G/L codes as in screenshot. G/L codes are always the same for DC events. Always check deferred box.

**GL Accounts**

currency: USD - United States Dollar ▼

project: Please select ▼

a/r: 0000-000000-11045 - Accounts Receivable-DC/NC Meetings ▼

☐ split revenue among multi-accounts order:

revenue: 1004-140006-41001 - DC/NC Registration Fees ▼

liability: 0000-000000-20004 - Netforum Credits ▼

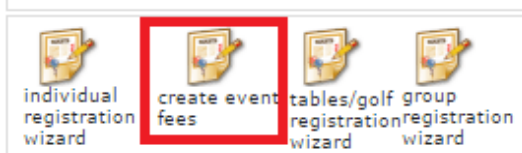
return: 1004-140006-41001 - DC/NC Registration Fees ▼

write off: 1004-140006-58901 - DC/NC Bad Debt Expense ▼

deferred? ☒ 0000-000000-27007 - Deferred Revenue-DC/NC Meetings ▼ recognize revenue date: 03/15/2017

## Step B: Create Event Fees

1. Click on the Create Event Fees icon.



- a. **Non-Member Surcharge** – Default setting is the minimum 33% surcharge for non-members. The percentage can be increased here or fees can be modified in next screen. **To create a members-only event, uncheck the non-member box so fees won't be available in fees tab.** They will, however, show up in set-up screen.
- b. **Early Bird Discount** – If the meeting does not have an early bird discount, set to 0 and then uncheck box. If there is an early bird discount, set a percentage and confirm fees in next screen.
- c. **Late Surcharge** – If the meeting does not have an additional late fee, set percentage to 0, but leave box checked. This will allow for on-sites to still be registered after the meeting. If there is a late fee, set a percentage and confirm fees in next screen.
- d. **Currency** – USD – United States Dollar.
- e. **Enter all the Member Standard fees:** Member, Member Public, Member Student, Member YL, and Member Retired.
- f. **Create complimentary fees** for this event box should stay checked if you will have comps to enter.
- g. Click Next.

Non-Member Surcharge % 33 ☒ Early Bird Discount % 25 ☒ Late Surcharge % 0 ☒

Currency USD - United States Dollar ▼ Is this a free event? ☐

Enter standard pricing for each individual type below. Prices will be rounded up to the nearest "5" increment. Click "Next" to manage the early and late prices.

**Member Standard**  
Cutoff: 4/30/2017

Member	\$ 100	.00
Member Public	\$ 120	.00
Member Student	\$ 75	.00
Member YL	\$ 60	.00
Member Retired	\$ 50	.00

Create complimentary fees? ☒ Allow donations for this event? ☐ Next Cancel

2. Check the "Is this a free event?" box to create a free event.
  - a. You will be taken to the next screen where you cannot edit any of the fees, but will just click Save. Your \$0 fees are now in netFORUM for all categories.
  - b. When you submit a members-only free event to DCMeetings for posting, please request that the non-member fees that show up under the fees tab be deleted.
  - c. Please note, the "Is this a free event?" box is different than the "Free Event" box on the main set up screen. You do not use that box.
3. Create event fees.
  - a. Calculations for corresponding non-member, early bird, and late fees are made based on the percentage set in previous screen.
  - b. System will calculate the percentages and will round up to nearest five-dollar increment.
  - c. Each of the calculated fees can be edited, but must meet the minimum surcharge. Fees that do not meet the required surcharge will generate a message and the amount will revert to calculated fee.  
(TIP: You can use the back button to go back to previous screen to change the percentage and generate new fees.)
  - d. Please NOTE when setting up a "Members Only" or "Full Member Only" event, you will see non-member fees in your set up screen. If you have unchecked the non-member fee box on the previous screen, though, you will not be able to edit those fees.
  - e. Click save once all prices are set to desired amounts.
  - f. You can now view fees in fees tab. Only meetings staff can edit fees once they are created.

Member Standard Cutoff: 4/30/2017		Member Early Bird Cutoff: 3/1/2017		Member Late Cutoff: 7/15/2017	
Member	\$ 100 .00	Member	\$ 75 .00	Member	\$ 100 .00
Member Public	\$ 120 .00	Member Public	\$ 90 .00	Member Public	\$ 120 .00
Member Student	\$ 75 .00	Member Student	\$ 60 .00	Member Student	\$ 75 .00
Member YL	\$ 60 .00	Member YL	\$ 45 .00	Member YL	\$ 60 .00
Member Retired	\$ 50 .00	Member Retired	\$ 40 .00	Member Retired	\$ 50 .00

Non-Member Standard Cutoff: 4/30/2017		Non-Member Early Bird Cutoff: 3/1/2017		Non-Member Late Cutoff: 7/15/2017	
Non-Member	\$ 135 .00	Non-Member	\$ 110 .00	Non-Member	\$ 135 .00
Non-Member Public	\$ 160 .00	Non-Member Public	\$ 130 .00	Non-Member Public	\$ 160 .00
Non-Member Student	\$ 100 .00	Non-Member Student	\$ 85 .00	Non-Member Student	\$ 100 .00
Non-Member YL	\$ 80 .00	Non-Member YL	\$ 65 .00	Non-Member YL	\$ 80 .00

## Procedure 3: Build out Event Information

### Step A: Add Location

1. To add a location, click on More > General.

A screenshot of a software interface showing a dropdown menu. The menu is open, displaying several options: 'General' (highlighted with a red box), 'Faculty', 'Registrants', 'Housing', 'Course', and 'Credits'. Below the menu, there are buttons for 'Fees' and 'More'.

2. Click the + sign next to Locations.


A screenshot of a software interface showing a 'Locations' section. There is a button with a plus sign (+) next to the 'Locations' text, which is highlighted with a red box. To the left of the plus sign are two small circular icons.

- Click the + sign next to location.

**Location Information**

event title: Sample Event

start date: 5/15/2017 end date: 5/20/2017

location: Please select 

location name:

primary? ☐


- Type the name of location in the location name field. A list of likely matches will pop up as you type. If you see the correct location in the pop up list, click on the arrow next to that name and it will populate the fields in your dialogue box.


**Note: If your location is not appearing then it must be added to the database through the CRM module. Refer to Add an Organization documentation.**


- Select a location type from the drop down list. You must add an "\*" in location code box and description box. The Html description can be used to copy and paste directions. If there are not any directions to include in the Html description, type an "\*" in the box so that the location address will pull on the email confirmation.


**Location Information**


location name: Hilton


location code: \* location type: Please select  housing ☐

address: Business:1329 Baltimore, Kansas City, MO 64105 

phone: Please select 

fax: Please select 

url: Please select 

email: Please select 

description: \*

Hilton  
1329 Baltimore  
Kansas City, MO 64105

- Click Save.
- Check the "Primary?" box.

**Registration will not function unless this box is checked.**

**Location Information**

event title: Sample Event

start date: 5/15/2017 end date: 5/20/2017

location: Hilton


location name:

primary? ☒

- Click Save.


## Step B: Add start times and end times

- Click on "Edit Event Info."

**miscellaneous information** enable membership combo? 

code/type: 12345678 / District Council fund products:



category: Member Only



edit event info 



- Add start and end times and check the time zone.


**Note that end time comes before start time on this screen.**

**Event Date / Time & Other Information**

event start date: 5/15/2017  end date: 5/20/2017  end time: 5:00pm

pre reg cut-off: 5/1/2017  standard: 4/30/2017  start time: 9:00am

early: 3/1/2017  late: 7/15/2017  event closed ☐

post to web:   remove web:  

time zone: (GMT-05:00) Eastern Time (US & Canada)

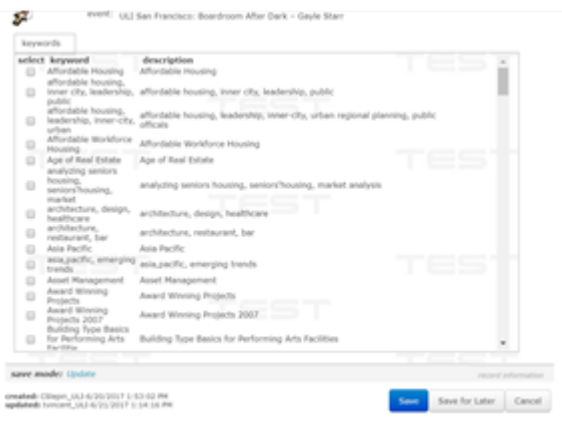
- Click Save.

## Step C: Add keywords to the event

1. Click on the keywords button.



2. Click the box next to the keywords you would like to associate with the event. Note: Keywords are assigned to events based on the topic of the events, an event can have multiple keywords, but the words should be relevant to the meeting content and/or its speaker. See appendix for full list of keywords.

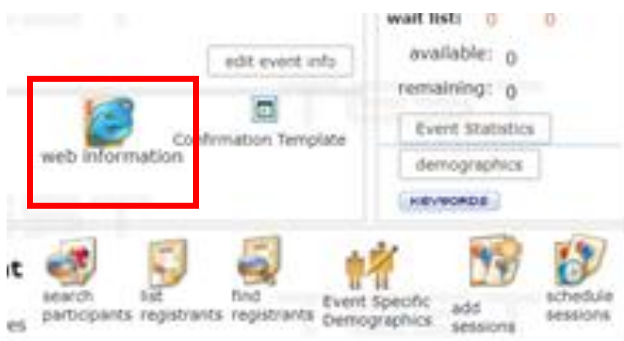


3. Click save to save your keyword selections

## Step D: Add an event description

The event description is used to describe your event and the agenda for the event, this information can be the same as the text used for your Real Magnet (RM) email communications or from the WordPress description. This can be setup later, i.e. if you plan to input your RM communication here

1. Click on web information icon



2. Paste preselected text into the box or type in the event description

3. Click save and the window will close

## Procedure 4: Submit meeting.

1. Meeting is now ready to be submitted with documentation to [DCMeetings@uli.org](mailto:DCMeetings@uli.org).

## Procedure 4: Publish Event 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.

**ULI Minnesota: Spring 2018 Real Estate Leadership Roundtable Dinner**

ULI Minnesota: Spring 2018 Real Estate Leadership Roundtable Dinner  
begin: 5/22/2018 at: 5:30 PM ends: 5/22/2018 at: 8:00 PM

**registration information**  
pre reg: 3/1/2018 early: 3/13/2018 standard: 5/19/2018 late: 7/22/2018

**registration options**  
registration required? ☒ free event? ☒ abstract? ☒  
wait-list allowed? ☒ automatic registration from wait-list? ☒ (Space Permitting)  
**miscellaneous information** enable membership combo? ☒

code/type: 81171808 / District Council fund product:  
category: Member Only

**Publishing & Communication**  
post to: 3/15/2018 remove: 5/21/2018  
web: time zone: (GMT-05:00) Eastern Time (US & Canada) web information Confirmation Te  
confirmation: AW\_DCEventEmailconfirmation :: AW\_DCEventEmailconfirmation

edit event

individual registration wizard create event fees group registration wizard quick group registration wizard sponsor Import Cvent Fees search participants list registrants find registrants

Register an Individual  
group registration wizard  
quick group registration wizard  
sponsor  
search participants  
list registrants  
find registrants  
event specific demographics  
add sessions  
schedule sessions  
edit CEU  
generate payables  
Edit Narrative/Video  
Knowledge Finder  
Event Specific Demographics add sessions schedule sessions

This will take you to the Publish to Knowledge Finder screen where you will input publication details.

**Publish to Knowledge Finder**

Knowledge Finder Publish Date:

Enter a valid publish date for when the post will go live. This content will be updated during the next sync to WordPress.

Knowledge Finder Unpublish Date (Optional):

Enter a valid unpublish date, this date should be a date in the past (e.g. if today is 01/01/2018, then the unpublish date should be 12/31/2017).

NOTE: For times when you need to remove the content, e.g. if an event is canceled. If you are unpublishing an event, please alert [claire.gordon@uli.org](mailto:claire.gordon@uli.org) to complete the unpublishing process. Simply adding the end date will not un-publish the content.

This will update based on a nightly sync.

**Specific Content Publishing Controls**

Select content to publish to Knowledge Finder.

NOTE: Selected content is only published if a valid Event Publish date is entered above.

☐ Click here to publish the District Council Event Description on Knowledge Finder

Check the box next to the Event to select ALL content. Or check the boxes next to the specific content items that you want to publish (e.g. Faculty/Speakers, Sponsors, Sessions, Locations). Any unchecked boxes will not be published.

NOTE: By unchecking a box this content will get unpublished during the next sync

☒ ULI Nashville: Young Leader Mentor Participation Fee FY19

- ☐ Faculty
- ☐ Sponsors
- ☐ Sessions
- ☐ Locations

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)

**Publish to Knowledge Finder**

Knowledge Finder Publish Date:

Enter a valid publish date for when the post will go live. This content will be updated during the next sync to WordPress.

Knowledge Finder Unpublish Date (Optional):

Enter a valid unpublish date, this date should be a date in the past (e.g. if today is 02/02/2019, then the unpublish date should be 12/31/2017).

NOTE: For times when you need to remove the content, e.g. if an event is canceled. If you are unpublishing an event, please alert [claire.gordon@uli.org](mailto:claire.gordon@uli.org) to complete the unpublishing process. Simply adding the end date will not un-publish the content.

This will update based on a nightly sync.

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](mailto:claire.gordon@uli.org) to complete the unpublishing process. Simply adding the end date will not unpublish the content.)

- b. Select the checkbox next to “Publish Event Description to Knowledge Finder?”

**Specific Content Publishing Controls**

Select content to publish to Knowledge Finder.

NOTE: Selected content is only published if a valid Event Publish date is entered above.

☐ Click here to publish the District Council Event Description on Knowledge Finder

Check the box next to the Event to select ALL content. Or check the boxes next to the specific content items that you want to publish (e.g. Faculty/Speakers, Sponsors, Sessions, Locations). Any unchecked boxes will not be published.

- c. Select the checkboxes next to the items that you want to publish (e.g. Faculty/Speakers, Sponsors, Sessions, Locations).

**Specific Content Publishing Controls**

Select content to publish to Knowledge Finder.

NOTE: Selected content is only published if a valid Event Publish date is entered above.

☒ Click here to publish the District Council Event Description on Knowledge Finder

Check the box next to the Event to select ALL content. Or check the boxes next to the specific content items that you want to publish (e.g. Faculty/Speakers, Sponsors, Sessions, Locations). Any unchecked boxes will not be published.

NOTE: By unchecking a box this content will get unpublished during the next sync

☒ ULI Nashville: Young Leader Mentor Participation Fee FY19

☒ Faculty

☒ Sponsors

☒ Sessions

☒ Locations

Note: the only content that will come over will be Faculty/Speakers and Location.

- d. Click save

**Specific Content Publishing Controls**

Page Load Time: 0.584

4. After you click save, the editor for [knowledge.uli.org](http://knowledge.uli.org) will be alerted—not immediately, but once a day. Note: The editor for [knowledge.uli.org](http://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—Sample Published event on knowledge.uli.org

DETAILS

San Pedro, CA

August 16, 2018

DISTRICT COUNCIL

ULI Los Angeles

AGENDA CONTENT

The Port of Los Angeles and the communities of San Pedro and Wilmington have been the subject of three Technical Assistance Panel (TAP) reports, resulting in meaningful and lasting improvements to these locales.

Enjoy a 2 hour boat cruise on the magnificent Sir Winston, Southern California's newest dining yacht, and see firsthand both the workings of America's busiest port and the synergies possible between ULI and local communities. We'll tour the Port of Los Angeles' LA Waterfront; embarking at San Pedro's Downtown Harbor, hear updates on the San Pedro Public Marketplace (former Ports o'Call) redevelopment, AltaSea marine research and innovation center, Space X's Big Falcon Rocket assembly facility, the Wilmington Waterfront Development projects, and also see upcoming opportunities for LA's iconic Warehouse 1 and the Cabrillo Way Marina.

The Port of LA complex covers more than 7,500 acres and 43 miles of waterfront, has 27 cargo terminals, more than 50 berths and 86 ship-to-shore cranes, and handled \$284 billion in cargo in 2017. Set against the picturesque backdrop of the Port of Los Angeles, with miles of public promenade and walking paths, acres of open space and scenic views, the LA Waterfront blankets more than 400 acres of prime waterfront property. The Port of Los Angeles funds and maintains the LA Waterfront which draws over 2 million visitors annually, and remains committed to enhancing public access to the waterfront by connecting visitors and local harbor communities with recreational and commercial attractions that expand and diversify the Port's position as a premier source of economic vitality for the region. San Pedro Bay port complex operations and commerce facilitate one in nine jobs in the five-county Southern California region

SPEAKERS

Michael Galvin

Director of Waterfront and Commercial Real Estate

Tim McOsker

AltaSea

RELEVANT TOPICS

Infrastructure – Airports/Rail/Port Facilities

Land Use Type/Sector – Waterfront

CONTENT PILLARS

Housing and Communities

Innovation in Development Practice

Real Estate Finance and Investment

Shaping Successful Cities and Regions

Sustainability and Economic Performance

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