

# How to create and publish TAPs

## Background on Technical Assistance Panels (TAPs)

TAPs are part of the ULI Advisory Services program and are implemented by District Councils. A group of panelists selected from the District Council participate in one- to two- day sessions to address land use challenges that require local knowledge to resolve. The TAP scope is defined by a sponsor and the panelists deliver recommendations in a high-quality report built on the community's existing accomplishments.

TAPs are recorded as Events in netFORUM for 3 main purposes:

- To create invoices for TAP sponsors to make payments to ULI
- To serve as a record of and repository for contract documents
- To serve as a record of and repository for completed TAP reports

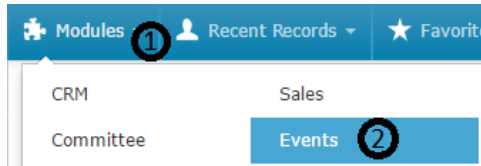
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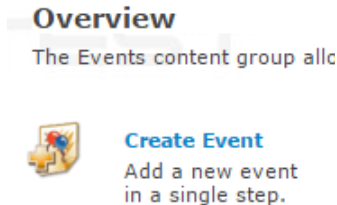
# Procedure 1: Add new TAP to netFORUM

## Step A: Enter TAP into netFORUM

1. Go to Modules > Events.



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



3. Set up Event Information for the TAP Panel.
  - a. **Event Code:** Request 8-digit event code from Jerry Kirschenman (Jerry.Kirschenman@ULI.org)
  - b. **Event category:** TAP
  - c. **Event Type:** TAPS Panel
  - d. **Title:** (See *best practices for naming the TAP*)
    - Make sure to name your TAP with a clear and concise title that conveys what the TAP is about
    - The preferred format is [District Council] + [Location / Region Name] + [TAP] e.g. ULI Washington New Carrollton TAP
    - Max 100 characters
  - e. **Start and End dates**
  - f. **GL Accounts (as below)**

**GL Accounts**

currency: USD - United States Dollar ▼

project: Please select ▼

a/r: 0000-000000-11049 - Accounts Receivable-Corporate Meetings/Conference ▼

☐ split revenue among multi-accounts order:


revenue: 1004-140006-44001 - DC/NC TAPS Contract Revenue ▼

liability: 0000-000000-20004 - Netforum Credits ▼

return: 1004-140006-44001 - DC/NC TAPS Contract Revenue ▼

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

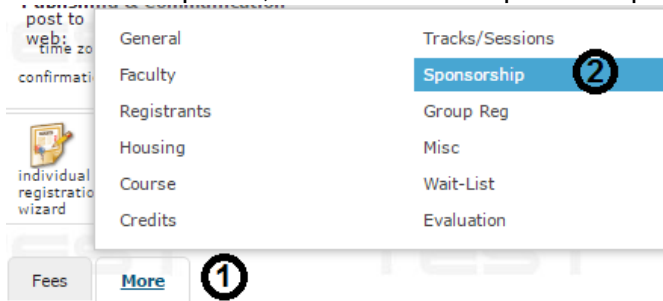
deferred? ☒ 0000-000000-27009 - Deferred Revenue-DC/NC TAPS ▼

recognize revenue date: 2/28/2017 

4. Click Save.

## Step B: Create Invoices

1. On the event profile, click on More > Sponsorship.



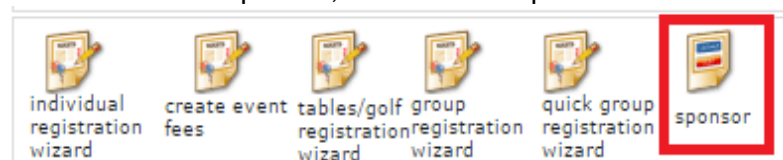
2. Click + next to event sponsor fees. You can add multiple sponsor types.



3. Complete the following fields.
  - a. Sponsorship drop down
  - b. Fee Name
  - c. Price: enter fee
  - d. Project: event code
  - e. G/L accounts as below
  - f. Recognize after date is meeting date

A screenshot of a web application form titled 'Add - Event Sponsor Fee'. The form has a blue header bar with the title and a close button. The form fields are as follows: 'event' (Richmond Virginia TAPS), 'track' (Please select), 'session' (Please select), 'sponsorship' (TAP Fee), 'maximum allowed' (empty), 'product code' (81001785), 'start date' (1/27/2017), 'end date' (empty), 'fee name' (Richmond Virginia TAPS - final payment), 'description' (Richmond Virginia TAPS), 'price' (5000.00), 'taxable flag?' (checkbox), 'sell online?' (checkbox). Below these is a section titled 'G/L Information' with a checkbox 'split revenue among multiple accounts'. It contains several dropdown menus: 'business unit' (ULI), 'currency' (USD - United States Dollar), 'project' (Please select), 'a/r account' (0000-000000-11047 - Accounts Receivable-DC/NC TAPS), 'revenue account' (1004-140006-44001 - DC/NC TAPS Contract Revenue), 'liability account' (0000-000000-20004 - Netforum Credits), 'return account' (1004-140006-44001 - DC/NC TAPS Contract Revenue), 'write off account' (1004-140006-58901 - DC/NC Bad Debt Expense), and 'deferred' (checkbox) (0000-000000-27009 - Deferred Revenue-DC/NC TAPS). There is also a 'recog. after date' field (02/28/2017). Below this is a section titled 'Product Price Attribute' with 'Membership' (member? Please select) and 'Customer' (customer type? Please select, non-profit? Please select, default rate - always available checkbox). There is also a 'source code' field with a search icon.


4. Click Save.
5. To add an event sponsor, click on the "Sponsor" button.



6. Select organization (must be in NF).

7. Select Type from drop down.
8. Check box next to sponsor fee.
9. Select DC/NC TAPS batch.
10. Transaction date can be edited.

#### Sponsor Information

**sponsor:** Virginia Commonwealth University, Urban and Regional Planning Program  **type:** TAP Fee ▼

**event:** District Council TAP

**track:** Please select ▼

**session:** Please select ▼

**faculty:** Please select ▼

#### Contact Information

**address:** Business:705 S Pine St, Richmond, VA 23220-6518 ▼  

**phone:** Please select ▼   **fax:** Please select ▼  

**email:** Please select ▼  

**url:** Please select ▼  

**logo:** Please select ▼

Virginia Commonwealth University,  
Urban and Regional Planning Program  
923 West Franklin Street  
Box 842028  
Richmond, VA 23284-2028


#### Sponsor Fee

	Product	Price	Currency	Member Type	Capacity	Available	Comments
<input checked="" type="checkbox"/>	District Council TAP - first payment	5,000.00	USD	[Any]			available

#### Confirmation And Payment Information


☐ send fax confirmation ☐ send e-mail confirmation **currency:** Please select ▼ **total** 5,000.00

#### Invoice and Payment Information


**batch:**  
ULI: \*FISCAL YEAR 2017-ULI-DC/NC TAPS ▼ 

**po number:**



**type:** proforma ▼


**transaction date:** 6/30/2017 

11. Click Save.
12. To print invoice, click on child form next to sponsor and click on arrow next to invoice.

Fees General Tracks/Sessions Faculty Sponsorship More 

↑ ↺ Sponsors

Sponsor	Track	Session	Faculty	Sponsor Type	ULI sponsor level	Invoice Code
  Virginia Commonwealth University, Urban and Regional Planning Program				TAP Fee		2193807

Invoice number	Salesperson	Batch	Proforma	Posted	Date
 2193807	koneill_ULI	*FISCAL YEAR 2017-ULI-DC/NC TAPS	✓		6/30/2017

[Contact](#) [Contact Type](#) [Phone](#) [\[add contacts\]](#)

[Document](#) [Document Summary](#) [\[add event sponsor documents\]](#)

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

### Invoice Profile

customer:	Virginia Commonwealth University, Urban and Regional Planning Program			<b>Billing Address</b>
bill to customer:	Virginia Commonwealth University, Urban and Regional Planning Program			Virginia Commonwealth University, Urban and Regional Planning Program 923 West Franklin Street Box 842028 Richmond, VA 23284-2028
invoice number:	<b>2193807</b>	order code:		
invoice batch:	*FISCAL YEAR 2017-ULI-DC/NC TAPS			
transaction date:	6/30/2017	po number:		
invoice terms:		collection status:		
source code:		media code:		
proforma?	Yes	paid in full?	No	
invoice total:	5000.00	batch closed?	No	
confirmations:	e-mail? No	balance:	5000.00	
group items?	No	currency:	USD - United States Dollar	
opportunity:				
				Notes▼ Edit

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

### Edit - Invoice

#### Invoice Detail

customer:	Virginia Commonwealth University, Urban and Regional Pla			Q
bill to customer:	Virginia Commonwealth University, Urban and Regional Pla			Q
billing contact:	Please select ▼			
address:	Virginia Commonwealth University, Urban and Regional Planning Program 923 West Franklin Street Box 842028 Richmc ▼			
invoice number:	<b>2193807</b>			
invoice batch:	ULI: *FISCAL YEAR 2017-ULI-DC/NC TAPS ▼			+
transaction date:	6/30/2017	po number:		
invoice terms:	Please select ▼			
source code:		media code:	Please select ▼	
tracking number:		collection status:	Please select ▼	
invoice total:	5000.00	invoice balance:	5000.00	
group items?	<input type="checkbox"/>	invoice group description:		
opportunity:	Please select ▼			<input type="checkbox"/> close opportunity?

#### Notes

external:

First payment

internal:

save mode: Update

record information

created: koneill\_ULI-2/13/2017 8:15:39 AM

Save Cancel

15. To download invoice with ULI format, click on the reports button.

### Invoice Profile

customer: [Virginia Commonwealth University, Urban and Regional Planning Program](#)  
 bill to customer: [Virginia Commonwealth University, Urban and Regional Planning Program](#)  
 invoice number: **2193807** order code:  
 invoice batch: [\\*FISCAL YEAR 2017-ULI-DC/NC TAPS](#)  
 transaction date: 6/30/2017 po number:  
 invoice terms: collection status:  
 source code: media code:  
 proforma? Yes paid in full? No batch closed? No  
 invoice total: 5000.00 balance: 5000.00  
 confirmations: e-mail? No fax? No currency:  
 group items? No  
 opportunity:

### Billing Address

Virginia Commonwealth University,  
 Urban and Regional Planning Program  
 923 West Franklin Street  
 Box 842028  
 Richmond, VA 23284-2028

Notes Edit

edit detail

return/cancel

void invoice

add payment

add claim

add line item

list invoice details

find invoice details

installment payments

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



# Urban Land Institute

Urban Land Institute - LB DC Sponsors/TAPS  
 PO Box 418355  
 Boston, MA 02241-8355  
 Email: [customerservice@uli.org](mailto:customerservice@uli.org)  
 1-800-321-5011 or 1-410-626-7500

Customer #: 0005831230

Virginia Commonwealth University, Urban and Regional  
 Planning Program  
 705 S Pine St  
 Richmond, VA 23220-6518

## Invoice

Invoice # : 2193807  
 Invoice Date: 06/30/2017

Description	Product Code	Quantity	Price	Discount	Amount
District Council TAP - first payment	taptest	1	\$5,000.00	\$0.00	\$5,000.00

Notes:

First payment

## Step C: Upload Contract Document

1. Follow the steps above to get the screen in step #12 to Create Invoices and click the “add event sponsor documents” highlighted in red below:

The screenshot shows the 'Sponsors' section of a web application. At the top, there are tabs for 'Fees', 'General', 'Tracks/Sessions', 'Faculty', 'Sponsorship', and 'More'. The 'Sponsorship' tab is selected. Below the tabs, there is a 'Sponsors' header with a 'Personalize' button. A table lists sponsors, with the first row showing 'Virginia Commonwealth University, Urban and Regional Planning Program' and 'TAP Fee' of '2193807'. Below the table, there are links for 'Contact', 'Contact Type', 'Phone', and 'add contacts'. The 'add event sponsor documents' link is highlighted with a red box.

2. Click the “+”.

The screenshot shows the 'Add - Sponsor Document' form. The 'sponsor' field is set to 'City of Austin, Economic Development Department'. The 'document' field is a dropdown menu with 'Please select' as the current selection. A red box highlights the '+' icon in the dropdown menu. Below the form, there is a 'save mode: Insert' button and a 'record information' button. At the bottom, there are 'Save' and 'Cancel' buttons.






3. Complete the 3 fields highlighted in red below: document code, description, and file to upload:

The screenshot shows the 'Add - File Upload' form. The 'document code' field is set to 'Red River Contract'. The 'summary' field is empty. The 'description' field is set to 'ULI Austin Red River TAP Contract'. The 'url' field is empty. The 'file to upload' field is set to 'Choose File' and 'ULI \_ RR TAP signed contract 10-6-2016 EXECUTED.pdf'. The 'document code', 'description', and 'file to upload' fields are highlighted with red boxes. Below the form, there is a 'save mode: Insert' button and a 'record information' button. At the bottom, there are 'Save' and 'Cancel' buttons.

- document code – enter in simplified name of TAP report + “Contract”
- description – list District Council name and full title of TAP report + “Contract”
- file to upload – executed contract document preferably in PDF format

Click Save when done.

4. Click Save again under the “Add – Sponsor Document” to complete contract upload.
5. The uploaded contract will appear under the Sponsors section of the TAP event record.

Sponsors						
Sponsor	Track	Session	Faculty	Sponsor Type	ULI sponsor level	Invoice Code
  City of Austin, Economic Development Department				Americas DC Sponsorship		2319541
Invoice number	Salesperson	Batch	Proforma	Posted	Date	
 2319541	MMaldonado_ULI	*FISCAL YEAR 2017-ULI-DC/NC SPONSORS	✓		6/30/2017	
Contact	Contact Type	Phone	[add contacts]			
Document	Document Summary	[add event sponsor documents]				
  	Red River Contract					

## Step D: Upload Completed TAP Report

- From the Event, click on the tab labeled “More” next to the “Fees” tab, then click on “Misc” under the “More” tab.

The screenshot shows the Abila system interface for the event 'ULI Austin Red River TAP-1727'. The left sidebar contains navigation options like Event Planning, Registrants, Sessions, Tracks, Speakers, Sponsors, Group Registrants, Locations, and Event X Registrant Type. The main content area displays event details including registration information, registration options, and miscellaneous information. A dropdown menu for 'Publishing & Communication' is open, showing options like General, Registrants, Group Reg, Housing, Course, Credits, Tracks/Sessions, Sponsorship, Faculty, Misc (highlighted), Wait-List, and Evaluation. The 'More' link in the bottom navigation bar is also highlighted.

- One of the expanded sections should be titled “Event Document” as shown below. Click on the “+” symbol on the far right of the Event Document banner.



**Add - Events Document**

**Event Document Information**

event title: ULI Austin Red River TAP-1727

document: Please select

save mode: Insert record information

KKaushal\_uli

Save Cancel

Page Load Time: 0.252

3. A pop up will show up as seen below, click on the “+” symbol on the far right of the “document” dropdown.

Modules Recent Records Favorites Search KKaushal\_uli

**Publishing & Communication**

post to Web: remove: web information

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

confirmation:

individual registration wizard create event fees group registration wizard quick group registration wizard sponsor search participants list registrants find registrants Event Specific Demographics add sessions schedule sessions

remaining: Event Statistics demographics KEYWORDS

Misc More

Source Codes

Event Document

Document Summary

There are no results to display.

Event Committees

Event Budget

Generated Payables

Personalize

4. Fill out the “Add – File Upload” form.
  - a. Document Code: Type in the name of the TAP Report.
  - b. Description: Use the topics in the Appendix that best describe this TAP Report.
  - c. URL: Use <http://dcresources.uli.org/programs/taps/taps-library/> to find a link to your TAP (organized by Fiscal Year). **Note:** if the TAP report is not on the DC Resources website, please contact Sara Gassman ([sara.gassman@uli.org](mailto:sara.gassman@uli.org)).
  - d. File to upload: Choose File → Upload the TAP Report Document
    - i. **Note:** Once you click “Save” in the lower right corner, you will not be able to edit this information but rather will need to delete the incorrect document and create a new entry. Please be sure the information you enter is correct.
  - e. Once all fields are complete, click “Save”.

## Add - File Upload

**document code:**

**summary:**

**description:**

**url:**

**file to upload:**  ULI Austin RedRiver TAP.pdf

*save mode: Insert* *record information*

KKaushal\_uli

5. Verify that the document is correct, then click "Save" once more.

### Add - Events Document

**Event Document Information**

**event title:** ULI Austin Red River TAP-1727

**document:**

*save mode: Insert* *record information*

KKaushal\_uli

6. Your TAP Report will now be available under "Event Document".

Misc More Personalize

Source Codes

**Event Document**

**Document** **Document Summary**

Red River Cultural

Event Committees

Event Budget

Generated Payables

7. You can once more verify that the correct report is uploaded by clicking on the title of the document.

# Procedure 2: Build out TAP information

## Step A: Link Panelists to TAP Event Record

1. On the Event page, click on the “More” tab next to “Fees” and select “Faculty”

ULI Austin Red River TAP-1727

ULI Austin Red River TAP-1727  
begin: 10/31/2016 ends: 11/30/2016

registration information  
pre reg: early: standard: late:

registration options  
registration required? ☒ free event? ☒ abstract? ☒  
wait-list allowed? ☒ automatic registration from wait-list? ☒ (Space Permitting)  
miscellaneous information  
code/type: 81021727 / TAPS Panel enable membership combo? ☒  
category: TAP fund product:

Publishing & Communication  
post to web: time zone confirmation  
General Tracks/Sessions  
Registrants Sponsorship  
Group Reg Faculty  
Housing Misc  
Course Wait-List  
Credits Evaluation

Statistics  
goals  
registration: revenue:  
attendance  
projected:  
guaranteed: capacity:  
counts  
registered: main guest  
wait list: 0 0  
available:  
remaining:  
Event Statistics  
demographics  
KEYWORDS

edit event info

find registrants registrants Event Specific Demographics add sessions schedule sessions

Fees More

2. You will see the “Volunteers” tab opened as shown below. Then click on the + symbol on the far right on the “Volunteers” banner.

Faculty More

Personalize

Staff

Speakers

Name Session Type Status

There are no results to display.

Volunteers

Name Session Type Region

There are no results to display.

Faculty Interest(S)

Speaker Evaluation

3. Type in the last name of the panelist under “Volunteer”. A drop-down search will appear giving you results, or you can click the magnifying glass to have the results show up in a separate window. To refine the search, type “[last name] [first name]” and this will allow the panelist’s information to complete the form.

**Add - Volunteer**

**General Volunteer Information**

event: ULI Austin Red River TAP-1727

volunteer: McKinnerney John

organization: 1

bio:

First	Middle	Last Name	ID	Organization	E-mail	Title	Address	City, State, Post Code	Member ID	Member Type
John	B.	McKinnerney								

session code:

volunteer type:

volunteer region:

reports to:

goal description:

**Contact Information**

pref contact method:

address:

phone:

fax:

email: Please select

Page Load Time: 0.002

save mode: Insert

record information

KKaushal\_uli

**Save** **Cancel**

4. After clicking on the correct panelist, the rest of the form will auto-populate as shown below.

**Add - Volunteer**

**General Volunteer Information**

event: ULI Austin Red River TAP-1727

volunteer: McKinnerney John B.

organization: Castle Hill Partners

bio:

session code: Please select

volunteer type: Please select

volunteer region: Please select

reports to: Please select

goal description:

goal value:

goal number:

**Contact Information**

pref contact method: E-Mail

address: Business

phone:

fax:

email:

save mode: Insert

record information

KKaushal\_uli

**Save** **Cancel**

**Note:** Panelists are entered into the system under their full name. A shortened version like Tom will need to be entered as Thomas.

- After clicking “Save”, the panelist’s name will now appear under the “Volunteers” tab under the event.

The screenshot shows a CRM interface with a sidebar on the left containing tabs: Faculty, More, Staff, Speakers, Volunteers, Faculty Interest(S), and Speaker Evaluation. The main area displays a table with columns: Name, Session, Type, and Status. The 'Volunteers' tab is active, and the table shows one entry: 'McKinnerney John B.'. The name is circled in red.

Their participation in the TAP event will also be listed on their personal page under Events → Faculty Assignments.

## Step B: Add location and organization for the TAP event

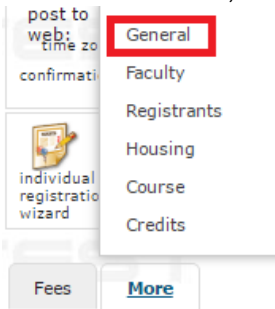
- TAP reports must be assigned a City, State location
  - Note: You will need to add your TAP location to the database through the CRM module. Refer to Add an Organization documentation.**
- TAP organization/location can be entered in the CRM module without the all the typical required fields.
  - Add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

The screenshot shows the 'Organization Information' form. The 'name' field is highlighted in red and contains 'ULI Washington GENERIC TAP'. The 'city/state/zip' field is also highlighted in red and contains 'WASHINGTON'. Other fields include 'acronym', 'organization type', 'source code', 'tax exempt?', 'tax id', 'parent company', 'primary contact', 'mailing address', 'billing address', 'county/district', 'province', and 'mailstop'.

- For the Organization Information a street address is not necessary, enter the **TAP report name, City, and State**
- Click Save and the TAP organization information is now complete. You will see a new screen with your TAP organization.

The screenshot shows the 'ULI Washington GENERIC TAP' organization page. The page displays contact information (Attn: ULI Washington GENERIC TAP, WASHINGTON, DC), phone, fax, and preference. It also shows 'Additional Information' including org id (0010135120), acronym, org type, parent, addr type (Business), tax id, e-mail, source, and score. A bottom navigation bar contains icons for Invoice, add membership, add chapter membership, add corp package, add payment, mass payment, add event sponsorship, exhibitor, and find individuals. There are also links for Web Login, Demographics, and User Defined Demographics.

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



5. Click the + sign next to Locations.



6. Click the + sign next to location.

A screenshot of a 'Location Information' form. The form includes fields for 'event title' (Sample Event), 'start date' (5/15/2017), and 'end date' (5/20/2017). The 'location' field is a dropdown menu with 'Please select' as the current value. To the right of the dropdown is a '+' icon, which is highlighted with a red rectangular box. Below the dropdown is a 'location name' field and a 'primary?' checkbox.

- a. 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.**

- b. 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.

A screenshot of a 'Location Information' form. The form includes fields for 'location name' (Hilton), 'location code' (\*), 'location type' (Please select), 'address' (Business:1329 Baltimore, Kansas City, MO 64105), 'phone', 'fax', 'url', 'email', and 'description'. The 'location type' dropdown menu is highlighted with a red rectangular box. To the right of the dropdown is a '+' icon.

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

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

A screenshot of a 'Location Information' form. The form includes fields for 'event title' (Sample Event), 'start date' (5/15/2017), and 'end date' (5/20/2017). The 'location' field is a dropdown menu with 'Hilton' as the current value. To the right of the dropdown is a '+' icon. Below the dropdown is a 'location name' field and a 'primary?' checkbox, which is checked and highlighted with a red rectangular box.

- e. Click Save.

## Step C: Add keywords for your TAP event

Keywords are used in NetFORUM to categorize TAP reports for Knowledge Finder.

1. Click on the keywords button on the event

page

**ULI San Francisco City of Orinda TAP**

ULI San Francisco City of Orinda TAP  
begin: 4/10/2017 ends: 4/11/2017

**registration information**

pre reg: early: standard: late:

**registration options**

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

code/type: 81331706 / TAPS Panel fund product:  
category: TAP

**Publishing & Communication**

post to web: time zone: (GMT-05:00) Eastern Time (US & Canada) web information

confirmation:

**Statistics**

goals  
registration:  
revenue:  
**attendance**  
projected:  
guaranteed:  
capacity:

**counts**

	main	quest
registered:	0	0
wait list:	0	0
available:		
remaining:		

Event Statistics  
demographics

**KEYWORDS**

individual registration wizard create event fees group registration wizard quick group registration wizard sponsor Import Event Fees search participants list registrants find registrants Event Specific Demographics add sessions schedule sessions

2. Select keyword(s) based on the topic(s) of your TAP report (See appendix for a list of all keywords and guidance for choosing key words)

**Edit - Keywords**

event: ULI Philadelphia: West Fairview TAP

keywords

**select keyword**

select	keyword	description
<input type="checkbox"/>	Architecture - Design	Architecture - Design
<input type="checkbox"/>	Architecture - Landscape	Architecture - Landscape
<input type="checkbox"/>	Arts and Culture	Arts and Culture
<input type="checkbox"/>	Construction/Engineering	Construction/Engineering
<input type="checkbox"/>	Development - Business and Firms	Development - Business and Firms
<input type="checkbox"/>	Development - Nonprofit Developers	Development - Nonprofit Developers
<input type="checkbox"/>	Development Projects - Large Scale	Development Projects - Large Scale
<input type="checkbox"/>	Development Projects - Small Scale	Development Projects - Small Scale
<input type="checkbox"/>	Economic Development	Economic Development
<input type="checkbox"/>	Emerging Trends - Programs and Publications	Emerging Trends - Programs and Publications
<input type="checkbox"/>	Finance	Finance
<input type="checkbox"/>	Finance - Asset/Portfolio Management	Finance - Asset/Portfolio Management
<input type="checkbox"/>	Finance - Capital Markets	Finance - Capital Markets
<input type="checkbox"/>	Finance - Cross-Border Investment/Development	Finance - Cross-Border Investment/Development
<input type="checkbox"/>	Food and Real Estate	Food and Real Estate
<input type="checkbox"/>	Freestone Course	Any netFORUM courses that should be synched to the Freestone learning management catalog. netFORUM courses may include events and publications.
<input type="checkbox"/>	Infrastructure - Active Transportation	Infrastructure - Active Transportation

save mode: Update

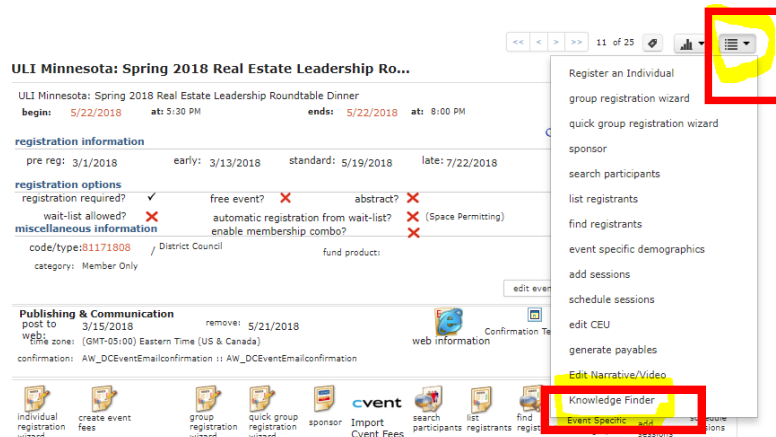
created: ARambo\_ULI-2/14/2018 11:10:05 AM

**Save** Save for Later Cancel

3. Click save, the box will automatically close

# Procedure 3: 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. 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 screenshot of the "Publish to Knowledge Finder" form. The form has a blue header bar with the title "Publish to Knowledge Finder". Below the header, there are two main input fields: "Knowledge Finder Publish Date:" and "Knowledge Finder Unpublish Date (Optional):". Both fields have a calendar icon to the right of the input box. A red arrow points to the "Publish Date" field, and another red arrow points to the "Unpublish Date" field. Below these fields, there is a note: "Enter a valid publish date for when the post will go live. This content will be updated during the next sync to WordPress." and "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).". A larger note follows: "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 to complete the unpublishing process. Simply adding the end date will not unpublish the content. This will update based on a nightly sync." At the bottom of the form, there is a section titled "Specific Content Publishing Controls" which contains a heading "Select content to publish to Knowledge Finder." and a note: "NOTE: Selected content is only published if a valid Event Publish date is entered above." Below this note is a text input field labeled "Technical Panel link goes here:" which is highlighted with a red box.

- 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](mailto: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.

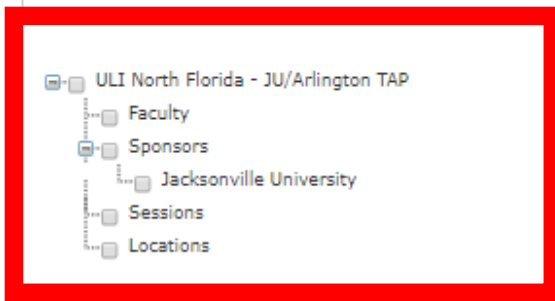
A screenshot of the "Specific Content Publishing Controls" section of the form. It features a heading "Select content to publish to Knowledge Finder." followed by a note: "NOTE: Selected content is only published if a valid Event Publish date is entered above." Below this note is a text input field labeled "Technical Panel link goes here:" which is highlighted with a red box.

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

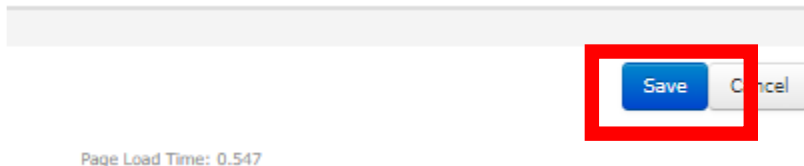


Check the box next to the Event to select ALL content. Or check the boxes next to the specific content items that you want to publish (e.g. Faculty/Speakers, Sponsors, Sessions, Locations). Any unchecked boxes will not be published.

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



- 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 TAPs
- 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– TAP Report Topics

Please review the following TAP report topics and select the topics most relevant to the given report.

1. Downtown Revitalization
2. Neighborhood and Corridor Revitalization
3. Transit Oriented Development
4. Infrastructure/Transportation/Transit
5. Housing and Communities – Workforce and Affordable Housing + Housing Finance
6. Economic Growth
7. Disaster Response
8. Office and Employment
9. Waterfront Development
10. Industrial, Ports and Rail
11. Masterplan and Resort Communities
12. Urban Resilience
13. Sustainable Development
14. Retail, Entertainment
15. Stadiums, Arenas and Venues
16. Urban Design, Architecture and Place Making
17. Cultural Resources and Historic Preservation
18. Metropolitan/Regional Policy + Municipal Leadership
19. Universities, Institutions, Life Sciences and Military Bases
20. Public/Private Finance

*Source: ULI Advisory Services, August 2016*

## Appendix Item 2—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 3—How to choose keywords for National/District Council TAPs

- 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 4—Publish to Knowledge Finder Checklist

*Just because your TAP 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 TAP with the necessary information?
  - Have you added a location? And TAP name?
  - 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 TAP 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 5—Sample Published TAP on knowledge.uli.org

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## ULI Washington Annandale TAP


DETAILS

 Annandale, VA

 July 19-20, 2016

DISTRICT COUNCIL

ULI Washington

 **View PDF**

TECHNICAL ASSISTANCE PANEL REPORT

### PANELISTS

Tanya Stern

Deputy Director, Planning, Engagement and Design  
DC Office of Planning

Rob Goodill

Principal  
Torti Gallas + Partners

Josh Olsen

Senior Vice President  
Monument Realty

Nat Bottigheimer

DC Region Market Lead

Connie Fan

Principal  
LSG Landscape Architecture Inc.

Kaushambi Shah

Jeff Saxe

### RELEVANT TOPICS

Economic Development

Land Use Type/Sector – Recreation and Entertainment

Land Use Type/Sector – Retail

Resilience

Revitalization/Redevelopment – Downtown

Revitalization/Redevelopment – Healthy Neighborhoods and Corridors

### CONTENT PILLARS

Housing and Communities

**Innovation in Development Practice**

**Real Estate Finance and Investment**

Shaping Successful Cities and Regions

**Sustainability and Economic Performance**

