

Technical Assistance Panels (TAPs)

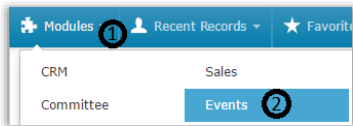
TAPs are part of the ULI Advisory Services program and are implemented by District Councils. A group of panelists selected from the District Council participate in one- to two- day sessions to address land use challenges that require local knowledge to resolve. The TAP scope is defined by a sponsor and 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:

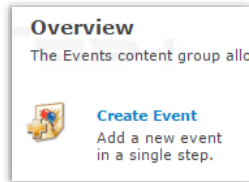
- To create invoices for TAP sponsors to make payments to ULI
- To serve as a record of and repository for contract documents
- To serve as a record of and repository for completed TAP reports

Entering TAPs in NF

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
- b. **Event category:** TAP
- c. **Event Type:** TAPS Panel
- d. **Title**
(Best practices for naming the TAP)
 - i. Make sure to name your TAP with a clear and concise title that conveys what the TAP is about
 - ii. Preferably with the location/region in the title
 - iii. Max 100 characters
- e. **Start and End dates**
- f. **GL Accounts (as below)**

Commented [CG1]:

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

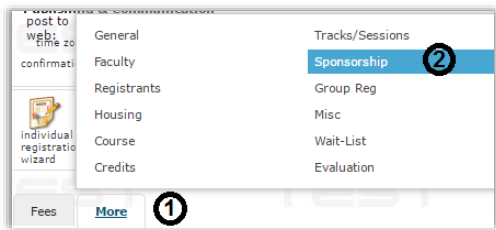
write off: 1004-140006-58901 - DC/NC Bad Debt Expense

deferred? 0000-000000-27009 - Deferred Revenue-DC/NC TAPS recognize revenue date: 2/28/2017

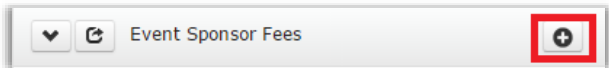
4. Click Save.

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

Add - Event Sponsor Fee

event: Richmond Virginia TAPS
 track: Please select
 session: Please select

sponsorship: TAP Fee maximum allowed:
 product code: 81001785 start date: 1/27/2017 end date:
 fee name: Richmond Virginia TAPS - final payment
 description: Richmond Virginia TAPS

price: 5000.00 taxable flag? sell online?

G/L Information
 split revenue among multiple accounts

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
 deferred 0000-000000-27009 - Deferred Revenue-DC/NC TAPS
 recog. after date: 02/28/2017

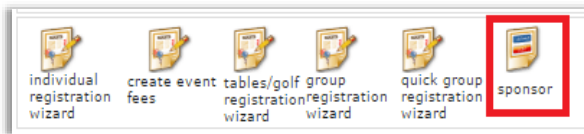
Product Price Attribute

Membership
 member? Please select

Customer
 customer type: Please select
 non-profit? Please select
 default rate - always available

source code:

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](#) Personalize

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	<input checked="" type="checkbox"/>		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		
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: USD - United States Dollar
group items?	No		
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		
bill to customer:	Virginia Commonwealth University, Urban and Regional Pla		
billing contact:	Please select ▼		
address:	Virginia Commonwealth University, Urban and Regional Planning Program 923 West Franklin Street Box 842028 Richm< ▼		
invoice number:	2193807		
invoice batch:	ULI: *FISCAL YEAR 2017-ULI-DC/NC TAPS ▼	e-mail confirmation sent?	No
transaction date:	6/30/2017	po number:	<input type="text"/>
invoice terms:	Please select ▼	fax confirmation sent?	No
source code:		proforma?	<input checked="" type="checkbox"/>
tracking number:	<input type="text"/>	media code:	Please select ▼
invoice total:	5000.00	paid in full?	No
group items?	<input type="checkbox"/>	batch closed?	No
invoice balance:	5000.00	invoice group description:	<input type="text"/>
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

<p>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:</p>	<p>Billing Address Virginia Commonwealth University, Urban and Regional Planning Program 923 West Franklin Street Box 842028 Richmond, VA 23284-2028</p> <p>Notes Edit</p>
---	--

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 - LB DC Sponsors/TAPS
 PO Box 418355
 Boston, MA 02241-8355
 Email: 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

Uploading 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 a web interface with tabs for Fees, General, Tracks/Sessions, Faculty, Sponsorship, and More. The Sponsors section is active, displaying a table with columns for Sponsor, Track, Session, Faculty, Sponsor Type, ULI sponsor level, and Invoice Code. Below the table, there are sections for Invoice number, Salesperson, Batch, Proforma, Posted, and Date. At the bottom, there are links for Contact, Contact Type, Phone, Document, and Document Summary. The 'add event sponsor documents' link is highlighted in red.

2. Click the “+”.

The screenshot shows a dialog box titled 'Add - Sponsor Document'. It has a 'sponsor' field with the value 'City of Austin, Economic Development Department' and a 'document' field with the value 'Please select'. A red box highlights the '+' icon next to the document field. 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 a dialog box titled 'Add - File Upload'. It has a 'document code' field with the value 'Red River Contract', a 'description' field with the value 'ULI Austin Red River TAP Contract', and a 'file to upload' field with the value 'Choose File ULI _ RR TAP signed contract 10-6-2016 EXECUTED.pdf'. The 'document code', 'description', and 'file to upload' fields are highlighted in red. 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.

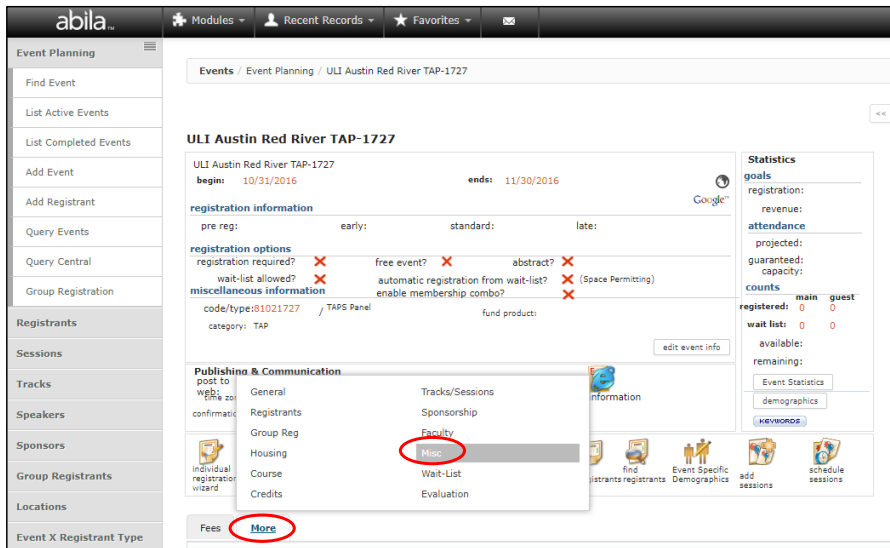
4. Click Save again under the “Add – Sponsor Document” to complete contract upload.
5. The uploaded contract will appear under the Sponsors section of the TAP event record.

Commented [CG2]: TAP locations can be entered in the CRM module without the all the typical required fields. They can be entered as below: ie Town of Easton (Add screen shot of add org module)

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						

Uploading Completed TAP Report

1. 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 event details include a start date of 10/31/2016 and an end date of 11/30/2016. The "Publishing & Communication" menu is open, showing options like General, Tracks/Sessions, Registrants, Sponsorship, Group Reg, Faculty, Housing, Misc, Course, Wait-List, Credits, and Evaluation. The "Misc" option is highlighted with a red circle. In the "Fees" section at the bottom, the "More" tab is also highlighted with a red circle.

2. 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.

The screenshot shows a window titled "Add - Events Document". Inside, there's a section for "Event Document Information" with the "event title" set to "ULI Austin Red River TAP-1727". Below this is a "document:" dropdown menu with the text "Please select". A red circle highlights the dropdown menu, and another red circle highlights a "+" symbol on the far right of the dropdown. At the bottom, there are "Save" and "Cancel" buttons, and a "Page Load Time: 0.252" indicator.

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

The screenshot shows the main application interface. At the top, there's a navigation bar with "Modules", "Recent Records", and "Favorites". Below this is a "Publishing & Communication" section with various icons for event management. The "Event Document" section is expanded, and a "+" symbol on the far right of the "Event Document" banner is circled in red. The interface also includes a search bar, a user profile "KKaushal", and a "Personalize" button.

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://dcreources.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 David Park (david.park@uli.org) and Sara Gassman (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: Red River Cultural

summary:

description: Housing and Committees - Workforce & Affordability
Housing + Housing Finance, Retail and Entertainment, Stadiums, Arenas, and Venues, Cultural Resources and Historic Preservation

url: http://dcresources.uli.org/?wpfb_dl=2786

file to upload: Choose File ULI Austin RedRiver TAP.pdf

save mode: Insert record information

KKaushal_uli Save Cancel

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: Red River Cultural

save mode: Insert record information

KKaushal_uli Save Cancel

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

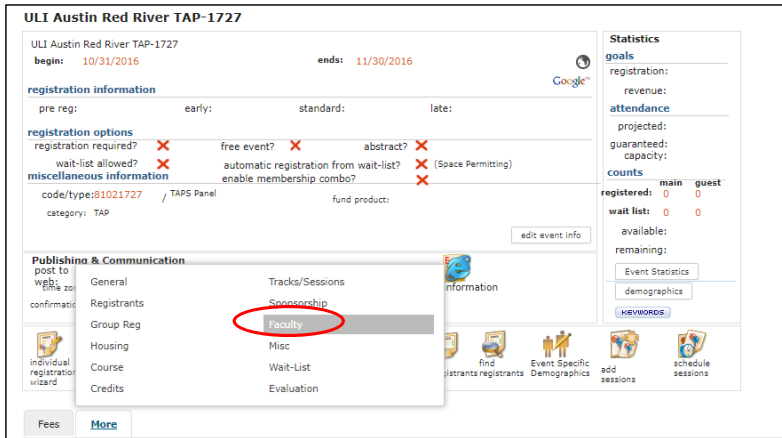
Event Budget

Generated Payables

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

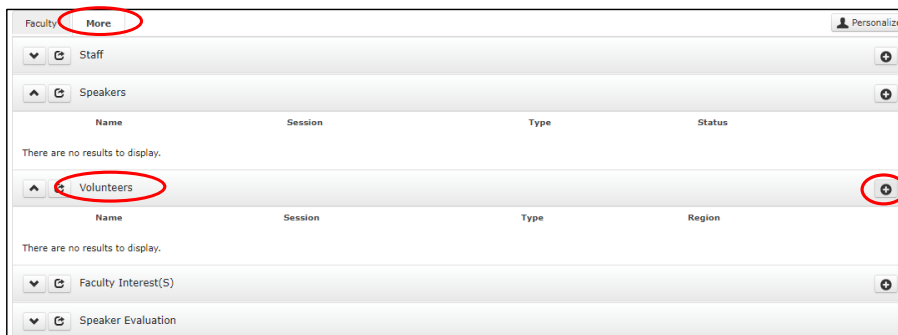
Linking Panelists to TAP Event Record

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



The screenshot shows the event page for "ULI Austin Red River TAP-1727". The event begins on 10/31/2016 and ends on 11/30/2016. The page is divided into several sections: "registration information", "registration options", "miscellaneous information", "Publishing & Communication", and "Statistics". The "More" tab next to "Fees" is highlighted. A dropdown menu is open, showing the following options: General, Tracks/Sessions, Sponsorship, Faculty (highlighted), Misc, Wait-List, and Evaluation. The "Faculty" option is circled in red.

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



The screenshot shows the Faculty page. The "More" tab is highlighted. The "Volunteers" tab is selected, and the "+" symbol on the far right of the "Volunteers" banner is circled. The page displays a table with columns: Name, Session, Type, and Status. The table is empty, and the text "There are no results to display." is shown. Below the table, there are tabs for "Faculty Interest(S)" and "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:

organization:

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

session code:

volunteer type:

volunteer region:

reports to:

goal description:

Contact Information

pref contact method:

address:

phone:

fax:

email:

Page Load Time: 0.002

save mode: Insert

record information

KKaushal_uli

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:

organization:

bio:

session code:

volunteer type:

volunteer region:

reports to:

goal description:

goal value:

goal number:

Contact Information

pref contact method:

address:

phone:

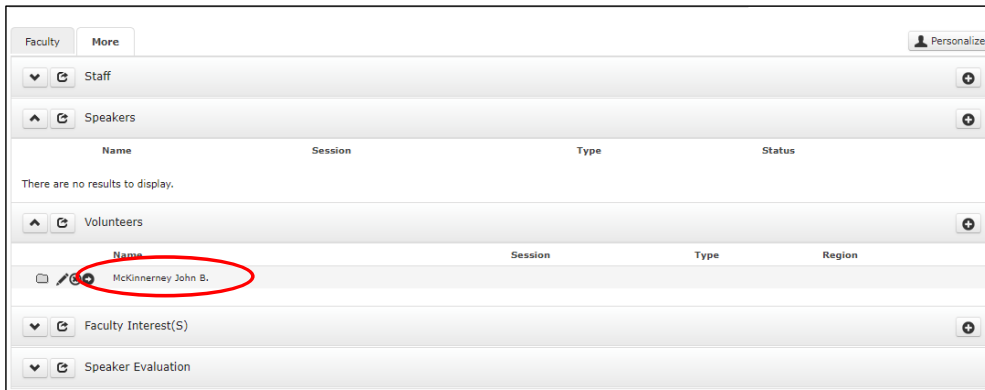
fax:

email:

KKaushal_uli

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.



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

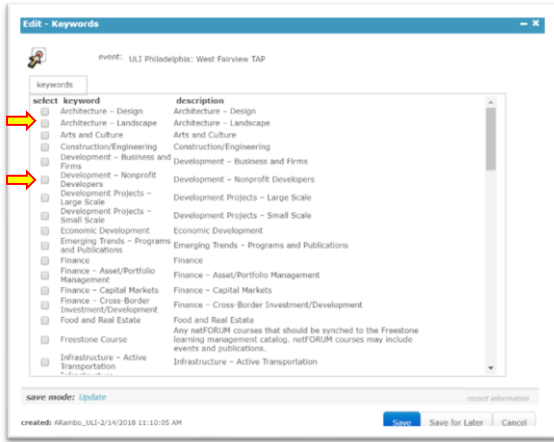
Adding keywords for your TAP event

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

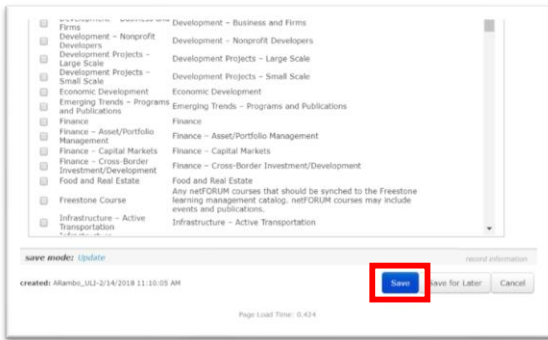
- Click on the keywords button on the event page



- Select keyword(s) based on the topic(s) of your TAP report



3. Click save, the box will automatically close



Adding a location for the TAP event

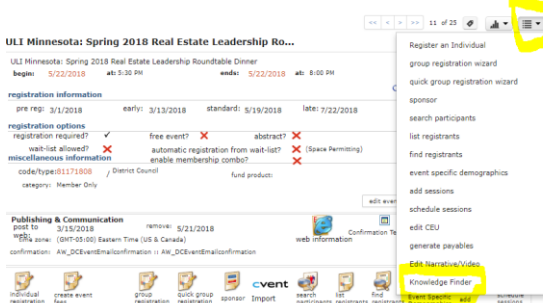
1. TAP reports must be assigned a City, State location
 - a. **Note: You will need to add your TAP location to the database through the CRM module. Refer to Add an Organization documentation.**
2. TAP organization/location can be entered in the CRM module without the all the typical required fields.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

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

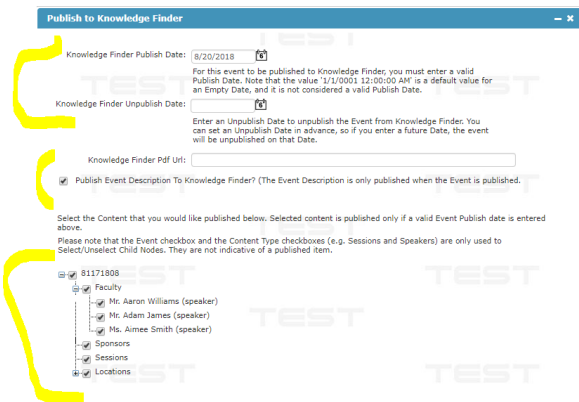


Publishing an Event to knowledge.uli.org

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. 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 URL.
 - ii. Note: If you require assistance generating a URL for your report, contact web support.
 - d. As of 8/22 you do not need to select the checkbox next to “Publish Event Description to Knowledge Finder?” (but may be required at a later date).
 - i. Note: This is only applicable to TAP reports. For other District Council content items you will have to select this box.
 - e. 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 TAPs
 - f. Hit 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 – 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