

Supplemental Reference Guide for:

**NAMING CONVENTIONS AND STANDARDS FOR  
QUERIES/SELECTIONS IN *ALI***

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Anticipated Audience(s):    ANYONE BUILDING QUERIES/SELECTIONS  
  RESEARCH, REPORTING, & ANALYTICS, ADVANCEMENT  
  SERVICES, ANNUAL GIVING/MARCOMM

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## Naming Conventions for Query/Selection

It is important that we use our database conversion as an opportunity to build from the ground up, and organized method for saving and naming queries and selections. If done properly, this will make queries/selections more user-friendly, maximize efficiency by eliminating duplicated queries, and make the system run better/faster by keeping our number of stored selections as low as possible.

**NOTE 1:** This guide is meant to be paired with the Document [“SRG Naming Conventions and Standards”](#). The abbreviations there will be used when naming Queries/Selections.

**NOTE 2:** As a general rule, begin your names with the highest-level applicable label, and work down to greater specificity from there (i.e., query names for Lincoln Campus alumni should begin with “UNL”, a query name for Foundation Trustees should begin “UNF”, etc.)

**NOTE 3:** All queries should be saved with a description that details specifically what the purpose is, and what records the query is selecting

**NOTE 4:** Not all queries will require each component of its respective naming convention. Only include what is applicable to the query, but do so in the correct order

Query/Selection Category	Naming Convention
Alumni	[Campus Abbrev] + [College Abbrev] + [Major/Department] + [Additional Info]
Donor/Giving	[Campus Abbreviation] OR “UNF” + [College/Institute Abbreviation] + [Department or Purpose/Designation] + “Donors” + [Additional Info]
Geographic	[ST] – [City/Region], Additional Info
Geographic-NE	NE - [City/Region], Additional Info
Import	Use Name/ID if event, otherwise describe as necessary (clear and concise as possible)
Recognition Programs	“UNF”/[Campus Abbreviation] + [Program Name] + [Additional Details, if necessary]
Solicit Codes	same name as the most specific, applicable solicit code
VIP Groups (External)	[Organization Name/Abbreviation] + [Name of group] + [Additional Info, if necessary]
Volunteers (Internal)	“UNF”/[Campus Abbreviation] + [Name of group] + [Additional Info, if necessary]
Other	See instruction below

\*This table is meant to be used as a shortcut. Full descriptions, instructions, and examples of how properly to name, save, and organize queries/selections are found below.

### Alumni Selections:

- Created to identify alumni of specific campuses, colleges, departments, majors, etc.
- Should be saved with a **CATEGORY of “Alumni”**
- Should be saved with FOLDER of “Prospect Research” > “Alumni Selections” > [Applicable Campus]
- **Convention:**
  - [Campus Abbreviation] + [College Abbreviation] + [Major/Department] + [Additional Info]
  - Examples:
    - “UNO Living Alumni”
    - “UNMC MED Living Alumni”
    - “UNL A&S Statistics Alumni – including deceased”\*
    - “UNK FA Theatre Living Alumni”

\*add a dash ( - ) when including non-standard info to the query/selection name

### Donor Selections:

- Created to identify donors to specific campuses, institutes, sites, purposes/designations, efforts, etc.
- Should be saved with a **CATEGORY of “Donor/Giving”**
- Should be saved with a FOLDER of “Prospect Research” > “Donor Selection” > Applicable Campus OR “UNF”
- **Convention:**
  - [Campus Abbreviation] OR “UNF” + [College/Institute Abbreviation] + [Department or Purpose/Designation] + “Donors” + [Additional Info]
  - Examples:
    - UNL Donors
    - UNMC MED Donors – Organizations
    - UNK FAH English Donors
    - UNF BECI Donors

### Geographic Selections (Outside of Nebraska):

- Created to identify constituents in a particular region outside of Nebraska
- Should be saved with a **CATEGORY of “Geographic”**
- Should be saved with a FOLDER of “Prospect Research” > “Geographic Selections” > Applicable Region of Country
- **Convention:**
  - [ST] – [City/Region], Additional Info
  - Examples:
    - CA – Los Angeles, 50-mile radius
    - AR – Phoenix/Tucson, address processing
    - CO – Denver, 60-mile radius
    - MI – Upper Peninsula
- NOTE: Add specifics of your selection into the Details when saving in query builder

### Geographic Selections in Nebraska:

- Created to identify constituents in a particular region of Nebraska
- Should be saved with a **CATEGORY of “Geographic-NE”**
- Should be saved with a FOLDER of “Prospect Research” > “Geographic Selections” > “Nebraska”
- **Convention:**
  - NE - [City/Region], Additional Info
  - Examples:
    - NE – Panhandle
    - NE – Kearney, 30-mile radius
    - NE – Lincoln/Omaha

### Import Selections:

- Created from a pre-determined list of Lookup IDs and imported into the system
- Save with a **CATEGORY of “Import”**
- No folder, not built in query-builder
- **Convention:**
  - Use Name/ID if event, otherwise describe as necessary (clear and concise as possible)
  - Use any applicable abbreviations
  - Examples:
    - 17 NUF Carol Swarts Event – Invitees
    - UNL A&S mailing – IDs from Amy Kloefkorn
- For event imports, please include a date in order to note most recent upload and to ease cleanup.

### Recognition Programs:

- Created to identify members of specific recognition programs
- Save with a **CATEGORY of “Recognition Programs”**
- Should be saved with a FOLDER of “Donor Relations and Stewardship” > “Recognition Programs”
- **Convention:**
  - “UNF”/[Campus Abbreviation] + [Program Name] + [Additional Details, if necessary]
  - Examples:
    - UNMC Chancellor’s Society
    - UNF Nebraska Circle
    - UNF Burnett Society

### VIP Groups (External):

- Created to identify members of certain groups/boards/committees that exist outside of the Foundation. Campus groups/committees are considered EXTERNAL
- Save with a **CATEGORY of “VIP Groups (External)”**
- Should be saved with a FOLDER of “Prospect Research” > “VIPs and Volunteers”
- **Convention:**
  - [Organization Name/Abbreviation] + [Name of group] + [Additional Info, if necessary]
  - Examples:
    - NU Board of Regents
    - UNL A&S Advisory Board
    - NAA Executive Board of Directors
    - Conagra Executive Leadership

### Volunteers (Internal):

- Created to identify members of certain groups/boards/committees that exist within the Foundation
- Save with a **CATEGORY of “Volunteers (Internal)”**
- Should be saved with a FOLDER of “Prospect Research” > “VIPs and Volunteers”
- **Convention:**
  - “UNF”/[Campus Abbreviation] + [Name of group] + [Additional Info, if necessary]
  - Examples:
    - UNF Board of Directors
    - UNF Trustees
    - UNL A&S Campaign Committee

### Solicit Codes:

- Created to identify constituents who request not to receive certain types of communication
- Save with a **CATEGORY of “Solicit Codes”**
- Should be saved with a FOLDER of “Prospect Research” > “Solicit Code Selections”
- **Convention:**
  - Should be given the same name as the most specific, applicable solicit code
  - Examples
    - “UNF - No Email” (This query includes solicit codes of “No Contact”, “No Email”, “UNF-No Contact”, “UNF-No Email”)
    - “NAA – No Mail” (This query includes solicit codes of “No Contact”, “No Mail”, “NAA-No Contact”, “NAA-No Mail”)

### Other:

- Created for very specific purposes, often single-use or temporary selections. Unless under very unique circumstances, these selections should not be made to be seen in query builder.
- Save with a **CATEGORY of “OTHER”**
- Should be saved with a folder applicable to the specific use. For example, a triplist created by Joe Kozal will be saved with a FOLDER of “Prospect Research” > “Joe Kozal”. The folder structure and how these queries are saved can be determined based on the judgement of the builder/user of the query/selection.
- **Convention:**
  - Should be named however makes sense, please still use the designated abbreviations for Orgs/Campuses/Colleges/Institutes mentioned in NOTE 1

Please continue to follow the Hierarchy rule mentioned above in NOTE 2