Supplemental Reference Guide for:

SITE RECORDS & SITE HIERARCHY

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University of Nebraska Foundation - Confidentiality Agreement-protected information.
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Sites and the Site Hierarchy

Sites and the **Site Hierarchy** in *Ali* CRM provide tools to categorize and report on data connected to specific part(s) of the University of Nebraska structure. The primary use of sites is to group **Purpose** and **Designation** records. Sites are also used by Marketing and Communications (appeal and general correspondence codes), Events Management (linking events to sites), Development (plans, steps and interactions) and others user groups.

Designed as a hierarchy, the site structure in *Ali* CRM allows records to be grouped with similar sites. This allows each campus to be designated as its own site, with each college or academic unit grouped under the campus, and departments and divisions grouped an additional level below. This structure allows reporting to happen at an individual site level (facilitating drill-down reporting), and it allows the grouping of sites that fall under another site in the hierarchy (facilitating roll-up reporting).

Viewing the Site Hierarchy

To understand how the site hierarchy is organized and functions, *Ali* CRM users have the ability to view the hierarchy by going to the **Administration** functional area in the blue navigation bar and selecting **Sites**:
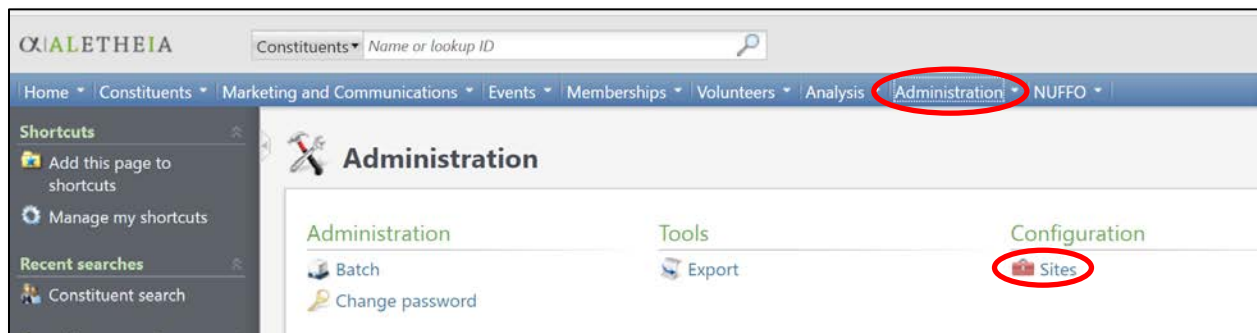
On the **Sites** page, users can view the entire hierarchy by clicking on the double chevron button at the top of the page, which will open the entire hierarchy, or drill down into individual sites by clicking on the expand/collapse arrow to the left of the individual site name. An arrow at the left edge of a **Site Name** indicates there are additional sites that fall under that site in the hierarchy and the user can click the arrow to drill down further to view those nested sites. The absence of an arrow indicates there are no additional sites nested below.
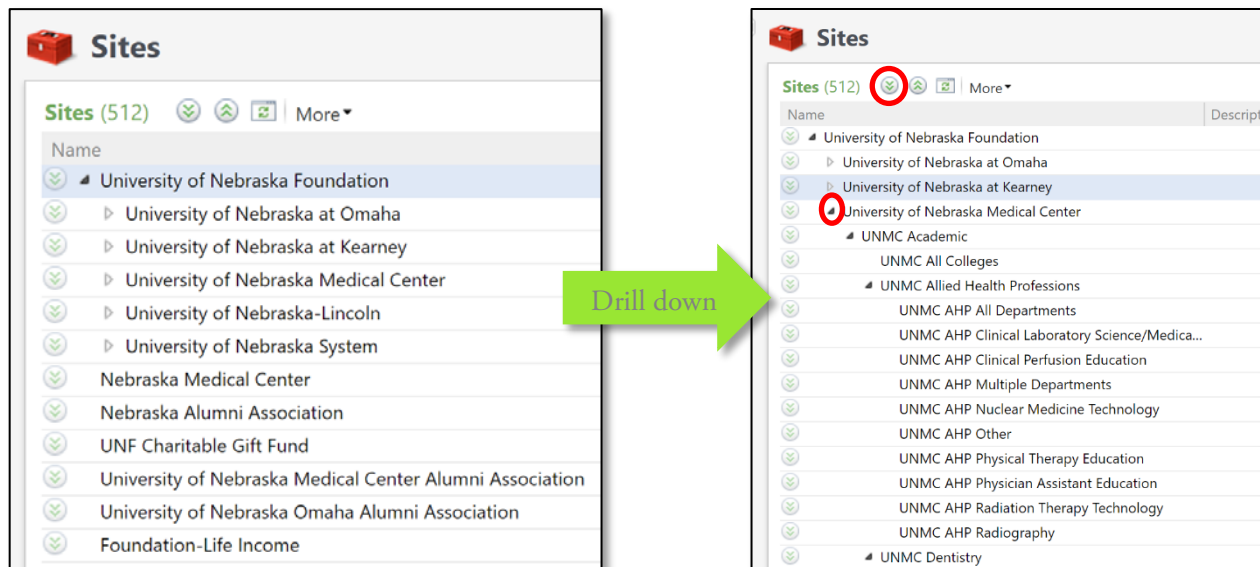
Understanding the Site Hierarchy

The **Site Hierarchy** was built to replicate, as best possible, the University of Nebraska Foundation and University of Nebraska structure. The top level of the hierarchy is the Foundation. The second-tier sites include each campus (UNK, UNMC, UNL, UNO), the University System, alumni associations (NAA, UNMCAA, UNOAA), and the Nebraska Medical Center. The hierarchy continues with colleges/academic units, departments, and divisions/sub-departments. Institutes are nested within the University of Nebraska System hierarchy.

To facilitate reporting needs, sites for **Academics**, **Athletics**, and **Other** have been created within the hierarchy on each campus. These site records are found between the campus level and the college/academic unit level within the hierarchy. This setup allows for easier reporting if certain types of funds (i.e. athletic) need to be excluded or included.

In most cases, if a site has multiple records that fall under it (i.e. a college with multiple departments), additional sites for **All**, **Multiple**, and **Other** have been created within that site structure. When linking records to sites, this structure allows for more accurate reporting within each site level. The table below outlines when the All, Multiple, and Other site records should be

used on **Purpose** or **Designation** records, though the concept may be applied to other record types in *Ali* CRM including **Events, Interactions, Plans, Appeals**, and others.

Site Name	When to Use
All	For use when *all* departments or *all* colleges/academic units will benefit from the purpose/designation. For example, a fund set up for the general support of UNK would be put in the site of UNK All Colleges. Another example would be a purpose/designation that provides a scholarship to any student who is in the UNL College of Architecture. Since no specific department is defined, the site on this purpose/designation would be UNL ARCH All Departments.
Multiple	For use when multiple, *not all,* departments or colleges/academic units will benefit from the purpose/designation. For example, a purpose/designation that provides a scholarship for students majoring in biology or chemistry at UNO would be coded with the site, UNO AS Multiple Departments.
Other	For use only when *no other site record exists* within the hierarchy for the intent of the purpose/designation. For example, a purpose/designation that provides support for the UNL Debate team would be coded with the site, UNL AS Other, as the debate team falls within the College of UNL Arts and Sciences but no site record exists for UNL AS Debate.

Site Naming Conventions

Each site record provides multiple naming and categorization fields. These fields have been populated in such a way that they can be used for multiple purposes:

Site Record Field	Intended Use
Name	The full name of the site. Typically, when a site falls under another, the Name will include abbreviations for the parent sites. For example, instead of listing a site of University of Nebraska-Lincoln-College of Business-Economics, the site name would be abbreviated as UNL BUS Economics. **Site Name** is used most frequently for reporting.
Site Type	Identifies where in the hierarchy the site record falls. Available values are provided via drop-down. **Site Type** is used most frequently for grouping and sorting of like sites.
Short Name	An abbreviated version of the Name. For example, a site with a name of UNL BUS Economics will have a short name of UNL BUS Econ. **Short Name** is used most frequently for reporting when space constraints exist.
Site ID	Used primarily to group and segment reporting for year-end goal setting. **Site ID** will abbreviate the Site Name so it only reflects the reporting area that will be used in year-end goal setting. For example, all funds that fall within the UNL College of Business will have a Site ID of UNL BUS.
Acronym	Not used.
Description	Not used.

Searching Using Sites

Ali CRM allows users to search and filter using **Site** throughout the system. Having a strong understanding of how the **Site Hierarchy** is structured will help ensure that users apply the right **Site Record**. Users are strongly encouraged to look at the **Site Hierarchy** to see where how sites records are nested and roll up.

When opening a **Site** search tool, users can search using any of the **Site Fields** (Site ID, Name, Short Name, etc…). When searching on **Site**, it is recommended to search using the site name, limit the search terms to the specific site being searched for, and employ the use of wildcard characters (*). For example, if a user wanted to perform a search on anything within the College of Medicine, in the **Name** field, type in "*Medicine*" to narrow down to College of Medicine related funds. The search will likely return multiple results, but the user should be able to identify the correct site from the filtered list.

As a reminder, users wishing to search all funds for a specific campus or college will want to avoid using a site that contains the word "All" in its name, as outlined in **Understanding the Site Hierarcy.** Selecting a site with "All" will only return results for anything placed under that site, but will exclude any other sites within that same level of the hierarchy. Users should instead select the higher level of the hierarchy when searching. For example, if a user wanted to search on all UNO Education sites, do not select the site of UNO ED All Departments. This would exclude any information from each of the other sites within that hierarchy. The user would instead want to select the site of UNO Education as this will show results for that site and all sites that are nested under it in the hierarchy.
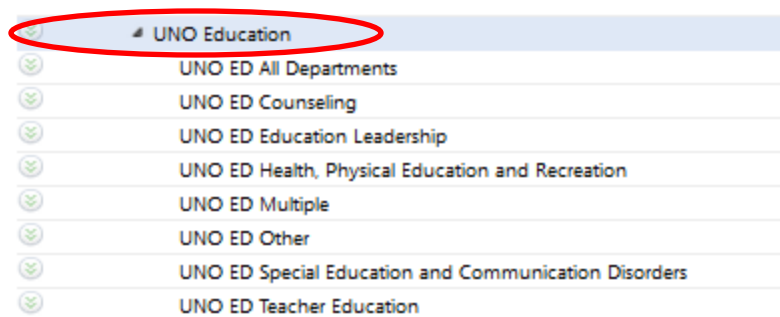
Site Reporting

Ali CRM allows for queries to be generated using **Site** records. The hierarchy, and how it has been structured, provide users the flexibility to query on specific site records or groups of records rolled up to a higher site record. When building queries using the **Site Record**, users have multiple operators from which to choose:

Operator	Intended Use
Equal To	For querying a single site record.
Not Equal To	For querying all site records except the single selected record.
One Of	For querying on multiple selected site records.
Not One Of	For querying all site records except the multiple selected records.
Blank	For querying any records that do not have a site assigned.
Not Blank	For querying records that have a site assigned, regardless of the value.
Under	For querying records that fall under a selected site. When using the **Under** operator: • Checking **Include Current Hierarchy Node** means that the site selected and anything under that site in the hierarchy *will* be included in results. • Unchecking **Include Current Hierarchy Node** means that anything under the site selected will be included in the results but the site selected will *not* be included.
Not Under	For querying records that do *not* fall under a selected site. When using the **Not Under** operator: • Checking **Include Current Hierarchy Node** means the site selected will be included in the results but *none of the sites under it* will be included. • Unchecking the **Include Current Hierarchy Node** means that *neither the site selected nor anything under that site* will be included in the results.