Agenda

• Business Glossary
• Summary of the Meetings With Data Domain Trustees
• Sharing Information
• Administrative Data Management Policy
• Best Practices
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Business Glossary

- Ready for a “soft” roll-out
- Currently only a few sample definitions are ready

www.nyu.edu/business-glossary
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• Business Glossary
• **Summary of the Meetings With Data Domain Trustees**
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Meetings with Data Domain Trustees

• Meetings took place over summer

• Some major themes emerged
  – Training
  – Data Accuracy and Cleanliness
  – Data Security
  – Systems Integration
• Develop self-paced, on-line training modules
• Develop and publicize “tip sheets” for various systems
• Encourage *ad hoc* users to ask questions and get refresher training
• Instill a sense of ownership in all users for data in University systems
  – Encourage data users to report all instances of “bad” data
Data Accuracy and Cleanliness

- Create standardized reference tables across all systems
- Build in more data entry validation checks
- Take advantage of real-time validation possibilities
Data Security

• Secure transfer of data among offices
• Centralized support of locally maintained systems, ensuring security, backup, etc.
• Develop reports on user access to reporting systems (similar to what is in place for transactional systems)
• Investigate which systems may be at risk of failure or are out-of-date and plan for replacement
Systems Integration

• Develop automated interfaces between systems to replace manual processes
• Improve existing automated interfaces to more fully meet needs
Other Themes

• Encourage sharing of information by individuals who attend meetings as delegates from their schools/offices

• Investigate possibilities of moving to self-service applications

• Address issues relevant to the Global Network University as systems are implemented and maintained
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• **Sharing Information**
• Administrative Data Management Policy
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Sharing Information

• Communication, communication, communication!
  – Include all interested parties in discussions
  – Remind those you meet with to share information within their own offices
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• Sharing Information
• **Administrative Data Management Policy**
• Best Practices
Administrative Data Management Policy

• Statement of Purpose

All Administrative Data is owned by New York University and, as such, all members of the University community and affiliates are responsible for appropriately using and safeguarding that data.
Administrative Data Management Policy

Key Points:
- Access and Confidentiality
- Training
- Integrity, Validation, and Correction
- Extraction, Manipulation, and Reporting
Administrative Data Management Policy

- Specifies roles and responsibilities
  - Data Trustee and Data Trustee Committee
  - Data Domain Trustee
  - Data Steward and Data Stewardship Advisory Group
  - Data Custodian
  - Data User
  - Office of Institutional Research

Link to policy can be found at www.nyu.edu/IR/DataGov
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DATA INTEGRITY

NYU | University Development & Alumni Relations

University Data Steward Quarterly Meeting
Multiple Efforts on Two Fronts

- **On the way in...**
  - Scripts run against work tables
  - Loader utility “checks”
  - System option duplicate checking
  - Inline Address verification
  - Conditional validation

- **On the inside...**
  - Overnight scripts
  - Data Integrity jobs
  - Quarterly screenings
Data Sources

- **SIS**: Student, Alumni, Parents
- **AIS**: Stern Grad Supplemental
- **iModules**: Alumni Portal
- **Ruffalo Cody**: Phonathon
- **Merkle**: Gift Mail Processing

**Data exported from source files, into work tables**

**Clean-up scripts run against SIS/AIS, exported to loader files**

**Dataloader utility checks, highlight errors for visual review**
Name formatting

Domestic Telephones *customized to fit* 3 digit area code, 3 digits for exchange, and the remaining 4 digits
- If a foreign Address, *entire* Telephone # goes into Foreign Telephone field (one string)

Foreign Telephone must have country call code in the beginning of the number or it will fail > The Central IT (Advance team) will *manually sync/check data* to ensure load will go through
Dataloader Checks (subset)

- Validating TMS codes to ensure they exist and are active.
- Validating loaded data match the target column’s data type, e.g., it validates a datetime column contains valid date format.
- Validating start dates fall before stop dates.
- Validating users have the correct Application access.
- Validating email addresses are formatted correctly.
- Validating year falls within valid range (1700-2100).
- Validating phone is formatted correctly.
- Validating numeric values are numbers.
- Validating Entity IDs are valid.
- Validating check box/radio button values are provided (default values are inserted, if not provided).
- Validating partial dates contain correct values.
- Validating required fields have values.
- Validating min/max size (character fields).
- Validating min/max range (numeric fields).
Inline Address Verification

QAS → Initium

Enter ZIP code, city name, county name or state code
91105

Enter street name, organization or PO Box type
south

91105, Pasadena, CA
S Arroyo Blvd
S Arroyo Pkwy
S Del Mar
S Flora
S Glendora
S Oak
S Paseo

Enter building number/name or organization
155

Enter apartment/suite/unit number or organization
d

15105
S Orange Grove Blvd
S Oak
S Paseo

Please confirm the address
155 South Orange Grove Boulevard Apt. C

Add comma!!
Accept
Conditional Validation

- Selection in one field determines available options in the next
- Fields invisible unless specific selection made
- Default values (based on user logged in)
- Pop-up validation messages
- Staff table lookup to auto-populate other fields
Overnight Scripts

- **Special Handling**
  - System generated, Inactivated on Lift Date

- **Appeals**
  - Inactivated on Stop Date

- **Prospects**
  - Stage updated based on status of Proposals...

- **Proposals/Assignments**
  - Status or gift processing action kicks off inactivation
<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;ACTIVE&quot; records without an Active &quot;PREFERRED&quot; address</td>
<td>Weekly</td>
</tr>
<tr>
<td>&quot;FOREIGN&quot; address that does not contain &quot;FOREIGN CITY ZIP&quot; information</td>
<td>Weekly</td>
</tr>
<tr>
<td>(Addr line 4)</td>
<td></td>
</tr>
<tr>
<td>&quot;LOST&quot; records that contain and &quot;ACTIVE&quot; and &quot;PREFERRED&quot; address</td>
<td>Bi-weekly</td>
</tr>
<tr>
<td>&quot;SEASONAL ADDRESSES&quot; that do not contain a start date</td>
<td>Monthly</td>
</tr>
<tr>
<td>Active Address with a past Stop Date</td>
<td>Weekly</td>
</tr>
<tr>
<td>Alumni Entities that do not have an Alum record type</td>
<td>Weekly</td>
</tr>
<tr>
<td>Deceased with an active Telephone number or Email</td>
<td>Weekly</td>
</tr>
<tr>
<td>Domestic Addresses without a City and State</td>
<td>Weekly</td>
</tr>
<tr>
<td>Entity records that are &quot;ACTIVE&quot; but the individual is &quot;DECEASED&quot;</td>
<td>Monthly</td>
</tr>
<tr>
<td>(contain DOD/obit)</td>
<td></td>
</tr>
<tr>
<td>Entity records that have a foreign Address where City and State are</td>
<td>Weekly</td>
</tr>
<tr>
<td>populated</td>
<td></td>
</tr>
<tr>
<td>Entities that are Deceased but contain &quot;active&quot; Affiliations</td>
<td>Weekly</td>
</tr>
<tr>
<td>Entity records that contain active Appeals where the Appeals are inactive</td>
<td>Monthly</td>
</tr>
<tr>
<td>Foreign Addresses that contain no information in Addr Line 1</td>
<td>Weekly</td>
</tr>
<tr>
<td>No address info and preferred address listed is an email address</td>
<td>Weekly</td>
</tr>
<tr>
<td>Non-alpha characters in any Name field</td>
<td>Weekly</td>
</tr>
<tr>
<td>Parents not linked to Students and &quot;Parents&quot; linked to Child(ren) who are</td>
<td>Every Semester</td>
</tr>
<tr>
<td>not Students</td>
<td></td>
</tr>
<tr>
<td>Record type of Alumni, Faculty/Staff, or Student and do not contain a Net</td>
<td>Weekly</td>
</tr>
<tr>
<td>ID, N# or Email address</td>
<td></td>
</tr>
<tr>
<td>Record type of Faculty/Staff and do not contain a Net Id, N# or Business</td>
<td>Weekly</td>
</tr>
<tr>
<td>email address</td>
<td></td>
</tr>
<tr>
<td>Records with multiple or duplicate 'Home' &amp; 'Business' address types.</td>
<td>Weekly</td>
</tr>
<tr>
<td>Etc....</td>
<td></td>
</tr>
</tbody>
</table>
Quarterly Screenings

- NCOA – all Active, preferred addresses screened against National Change of Address database
- LOST – all Lost records screened through Lexis Nexis

[vendor: AlumniFinder, division of AccuData Integrated]
Into the Future

- **New Data Analyst position**

- **Revised Data import process**
  - Data “bridge” API

- **Increased Data outreach**
  - Acquisition vendors
  - Alumni survey
Thank you!

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Thank You!