

# Data Standards Committee Meeting Minutes

Tuesday, November 7th  
Library Lecture Room

Present: Steve Howell, Pam Stimpert, Ryan Reinheart, Lori Lower, Wendy Schag, Vicki Yoho, Don Prezioso, Barb Kiser, Curtis White, Brian Wisniewski and Dreama Knight

Minutes and Agenda will be posted to the IT website  
<http://tech.ashland.edu/dscCommittee.html>

Ways to Avoid Duplicate Record Creation Information from Lesley University on how to avoid duplicate use as a base policy of entering names was reviewed. Several items were discussed. **Don** asked thoughts on this as a document. **Vicki Yoho** said it's good.

- Everyone uses different varieties of entering names which makes it hard to narrow down.
- The idea when creating a new person doing a name search on both Colleague and Benefactor database using the same ID number. Name and address can be different but ID# ties them together.
- There is no direct link from Colleague to Benefactor.
- **Wendy Schagg** said there is a big problem with Legacy Students when Development is creating the ID in Benefactor. When the child becomes a student Admissions or who ever is assigning a new ID# are not pulling over information. Admissions need to be doing a search on the Benefactor side before creating a new record.
- **Don** asked Brian about if the import should it go through a duplicate checking process cross checking pulling directly against Colleague.
- **Don** asked thoughts on this as a document or a starting point for a draft. **Vicki Yoho** said she thought it is good. **Don** stated that he has not seen anything about searching Benefactor or Colleague searching Benefactor in the document. This should probably be added somewhere. **Don** asked where he thought it should go, under search before creating a new record? It's not really a matter of the application its places you can go to create a new person all take you to the Name/address screen. **Wendy**

stated that the problem Colleague faces is there are more users which is good for Benefactor because there are less people in Benefactor that can make changes so it's easier to control.

- **Don** commented that this isn't his document and feedback is necessary. **Curtis** stated that it has very useful rule of thumb information and that next time a reminder is sent out folks that don't reply need to have followed up personal phone calls. **Wendy** asked if it's necessary to reply to the e-mail. **Curtis** said yes. **Brian** stated that this isn't a decision we should make without folks from Admission. **Curtis** made several phone calls to try and locate members from Admissions.
- **Brian** asked if folks graduating are done only when they graduate. **Wendy** stated they break it out several times a year because it's such a big job, it's horrible. **Don** stated this will change with Colleague advancement from a data population effort to a clean up effort. Children of alums, disadvantage is that these children don't have SS#s but do have a birthdates. **Barb Kiser** asked if they could ask for SS#s. **Wendy** stated there just happy to get the DOB don't know if they would. **Wendy** added that there are several ways of getting information on the AU website questionnaire but she's is not sure if the Alums SS#s are on the site. **Brian** asked about securing pages behind certificate and **Don** asked what happens with the questionnaire, is an email generated? **Wendy** said it generates an email, but she's not sure if the Alums SS# field is in the questionnaire. **Brian** asked about the % of folks in the legacy category get new IDs created. **Wendy** stated she's not sure how many but the majority of those students probably get a new ID created.
- **Wendy** asked if there is a way in the Colleague Advancement to delete records. **Don** is not sure but with the prospect purge, at the point that a student is a prospect student their records are very simple, no "real records" have been created and no money has changed hands. When students apply all kinds of stuff is then linked throughout the system. At one time there was a merge duplicates process in Benefactor. There is no corresponding process in Colleague that takes all the information and puts it in another person's record. Payroll is a lot harder because the records are kept for a longer period of time. Datatel has not come up with a good way of purging data.

Basically comes down to moving as much good information and marking the bad records somehow. **Brian** asked if anyone is doing this purge now. **Don** said only when someone runs across it. Merging information is the tough part. **Wendy** stated they've done that a lot trying to match IDs. Once they move all the information they delete them. **Don** said that when it comes to Colleague the proper thing is to not create a duplicate record in the first place. **Vickie Yoho** stated they merge workshop people all the time. **Brain** asked about getting to a single file system, not sure about Admissions purging. A number of schools have tried to create a system for deleting records. If it goes past "prospect" they could not be deleted. It's not the problem of getting rid of the data, purging is the real concern. **Wendy** stated if the student has an extensive history it's harder to purge. People with payroll deductions can be a real problem especially if they have a history that covers several years.

- **Don** asked what revisions are needed to make this an AU document. **Don** said that lots of this stuff is marketed for teaching, and asked what we need to do to make it a policy. **Don** asked if someone wants to take the documents and work with it. **Brian** stated that he would give it a shot changing some logos and stuff like that. **Brain** added that duplicates are one piece, but how names are entered should be added. Before the next meeting he will send it around for changes/approvals.
- Release 18 is in the midst of pre-testing. **Don** hopes the campus testing will go live around spring break 2007. After August 2007, release 17 will no longer be supported by Datatel.
- We are in Cohort 3, which means we started our process for training and loading Release 18 last summer with hopes of going live in January. With Larry Norris retiring it has impacted that schedule. The new programmer starts on Nov. 13<sup>th</sup> and hopefully within 3-6 months he will be taking up the load. **Curtis** stated that he has not hired a Datatel person before so he wasn't sure how this would go. The new hire is someone who has been in the IT programming type field and has a real feel for it. He's someone committed to the field, now we just have to get Robert up to speed with Datatel. **Curtis** stated that he is a good catch for Ashland University.
- Release 18 will be coming out. The biggest changes will be with the graphical interfaces. This summer we will begin the

process of replacing Benefactor with the new Colleague Advancement module. This should take about a year which puts on a schedule for going live around fall 2008. They are starting to come out with a utility for checking 2 databases against each other.

- Loading updates once a month. First round comparing Colleague people against Benefactor people and anything else regarding data usage.
- **Wendy** asked under Colleague why they have parent address information for 1 parent and not for another. **Vickie** stated that in admissions they can add parents and change the address. **Don** said there is nothing in Colleague that enforces that there are 2 parents. **Wendy** stated that there is a weird thing in Benefactor when you are attaching children you have to attach to both parents separately; parents might not be the same for both kids. She's hoping this doesn't happen in Colleague advancement.
- **Steve Howell** stated that another topic we've discussed with all the different offices registering students would it be useful to have a similar document to make sure all the different departments are doing things the same. **Don** stated absolutely that's what this committee is about, what fields need to be completed and how. **Don** said that we're starting with names and the next will be addresses and focusing on parents. On the surface this is not real simple but once we figure out a policy on name entries and updates, and it's confirmed by the Cabinet, then this will be what everyone uses. **Brian** stated that the system being built on different forms will be consolidated at a single point so that all the data will get dumped into Datatel instead of different forms. **Don** stated the difficulty is of course there is no policy on what should be done. If we state that part of data entry is the SS# it will be on all of the forms. **Brian** stated the eventually all students will be the same.

Next meeting address entries will be discussed. Brian will be sending out the rough draft policy document for review and at the next meeting we will complete the 1<sup>st</sup> step in the data entry policy. Meeting will be in Founders Seminar room on Tuesday, December 5<sup>th</sup> at 2:00.

