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We are currently using Blackbaud Raiser's Edge NXT as our CRM. To maintain data integrity and make sure that data coming into our system meets our set business rules and data entry standards, we used to run manually several queries plus another system tool (RE Queue) that would run multiple queries on a scheduled time. We had a total of 100 queries that would output the data inconsistencies to later be corrected. This tool serves to automate this process and consists of several stored procedures created in SQL that run multiple queries and returns data that is not aligned with specific business rules. The reports runs daily and when inconsistent data is found it allows for the operator to drill down on the granular data to be corrected.

This project was especially important for us to create as there is a university-wide goal to increase alumni giving and the focus on gift entry will be more critical in the upcoming years. While volume is expected to grow, staff is expected to remain the same, so enhancing business operations such as this one is critical for the overall success of the university. Before this tool was created, the Gift Services and Data Management department had to manually run over one hundred audit queries, regardless of the state of the data. Meaning some queries were run creating no output if no data met the criteria. RE Queue would often take hours to run and thereafter, it would take the staff additional hours to correct any inconsistencies. After this tool was created this process is always running in the background and generates output when the data does not meet the specified criteria. It also provides the exact instructions as to how to adjust the "inconsistent data" based on the set business rules. This saves the department time, where they no longer need to run the queries manually or use RE Queue, and instead they receive a weekly report of all the audits and highlights which audits need attention. In addition, the report allows a drilldown of the underlying data to view constituent ID's and other relevant information that is helpful in correcting the records.

This tool was created to be proactive and timely in auditing and adjusting large quantities of data. It enables the consistent monitoring of several complex data business rules. From this automation process many hours are saved from the staff not having to do all the manual work involved with running the queries. Instead, the staff can focus their time on other gift-related duties and quality control efforts. We spent \$0 as we currently have a Datawarehouse (built in-house, since 2014) and we actively use SSRS for visualization purposes.



Title of entry: **Streamlining Data Audits and Data Integrity at the FIU Foundation**
CASE: Advancement Services Initiatives

The Director of Gift Services and Data Management took the business lead on this project as this process is operated by her department. The coding was done by our inhouse staff Data Warehouse Architect. We used SSRS for the visualization and our Datawarehouse as our data repository

We started by translating existing data audit queries from Raisers Edge NXT front end as well as automations done in RE Queue into SQL stored procedures. These procedures were run against our Datawarehouse. From there we use SSRS to create the final audit report. We then conducted a validation process where the Gift Services and Data Management department reviewed the SSRS audit report and results and verified against the data in Raiser's Edge to verify that the process was running correctly.

See samples and descriptions on the following pages.

Below is a sample of the data audit report and below are descriptions for each column:

- 1) The first column contains a unique ID of the process.
- 2) The second column Record Count shows how many records failed the audit.
- 3) The third column has the audit name.
- 4) The fourth column has the instructions on how fix/adjust the audit.
- 5) The sixth column has the type of change - a global change or a manual change within the Raiser's Edge.
- 6) The last column shows the owner of the process, in this case which department oversees doing the changes.

Raiser's Edge NXT - Audits						
Execution Date and Time: 3/10/2022 11:36:31 AM						
Id	Record Count	Details	Audit Name	Procedure to Fix	Type	Current Owner
1	0	-	Daily Audit - Records With Two Primary Codes	Remove Individual if constituent is Alumni (can use global change)	Global	Data Management
2	39	Click Here	Daily Audit-Records With No Primary Constituency	Move primary constituency to first row	Manual	Data Management
3	3	Click Here	Daily Audit-Address=Lost, No Valid Addresses=No	Add has no valid address checkmark via global change	Global	Data Management
4	2	Click Here	Daily Audit-No Valid Addresses, Address is Valid	Remove no valid address checkmark via global change	Global	Data Management
5	318	Click Here	Daily Audit-Address is Valid, Send Mail Unchecked	Add send mail checkbox	Manual	Data Management
6	877	Click Here	Daily Audit-Address not in US, Send Mail Checked	Remove send mail checkbox	Manual	Data Management
7	1049	Click Here	Daily Audit-Address=Blank, No Valid Addresses=No	Add no valid address checkbox via global change	Global	Data Management
8	0	-	Daily Audit-Has a State, Country not United States	Verify part of US, add United States as country (if not remove state)	Manual	Data Management
9	24	Click Here	Daily Audit-Formal Addressee Blank	Fix addressee/salutation - note: there is a default for this to use	Manual	Data Management
10	24	Click Here	Daily Audit-Formal Salutation Blank	Fix addressee/salutation - note: there is a default for this to use	Manual	Data Management
11	456	Click Here	Daily Audit-Primary Addressee is Blank	Fix addressee/salutation - note: there is a default for this to use	Manual	Data Management
12	457	Click Here	Daily Audit-Primary Salutation is Blank	Fix addressee/salutation - note: there is a default for this to use	Manual	Data Management
13	2018	Click Here	Daily Audit-Address Blank, Type is Home/Business	Change to Home lost or Business Lost	Manual	Data Management
14	568	Click Here	Daily Audit-Preferred State Not US Country=US	Remove US as country, find correct country and fix record	Manual	Data Management
15	0	-	Daily Audit - City Contains #	Remove # (this affects FPM/Reeher)	Manual	Data Management
16	0	-	Daily Audit - A Primary Contact w/o Addressees	Add business addressee to primary contact - note: there is a default for this to use	Manual	Data Management



Below is a sample of the drill down output from the second audit highlighted in red in the above report. It shows records with no primary constituency flagged by the audit process.

Daily Audit-Records With No Primary Constituency

Execution Date and Time: 3/10/2022 11:38:04 AM

Const ID	Name	Primary Constituency Code	Constituent Added By	Constituent Last Changed By	Key Indicator	QRECID
525845	Central Development Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817815
525846	Principal Gifts Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817816
561670	EverTrue DXO 1	Miscellaneous Record	yyyyyyyy	cccccccc	Individual	856091
561671	EverTrue DXO 2	Miscellaneous Record	yyyyyyyy	cccccccc	Individual	856092
561672	EverTrue DXO 3	Miscellaneous Record	yyyyyyyy	cccccccc	Individual	856093
563846	EverTrue DXO 4	Miscellaneous Record	yyyyyyyy	cccccccc	Individual	858594
548099	Regional Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	841734
525298	Athletics Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817157
525299	Business Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817158
525300	CARTA Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817159
525301	CASE Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817160
525302	Corporate Relations Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817161
525303	DXO Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817162
525304	Engineering Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817163
525305	First Generation Pipeline	Miscellaneous Record	cccccccc	cccccccc	Organization	817164