

DONOR ENGAGEMENT – ADVANCEMENT SERVICES  
Dashboard Audit Queries

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Loading a dashboard for the first time

Go to RE and click ‘Dashboards’ on the left hand side  
Click “Select Shared Dashboards”  
Choose the dashboard name to load (all are listed below)  
Refresh the dashboard. You will have to do this each time you use it, or you can refresh individual panels that you are working on.  
Below are the different dashboard panels and that they mean.

Address Audit Queries

1. **No Valid Address but Send Mail Still Checked**
  - Check for a Returned Mail/Bad Address note. If there isn’t one, No Valid Address needs to be unchecked on Bio 1. If there is a note, send mail needs to be unchecked on the preferred address.
2. **Preferred Address = Previous Address**
  - Preferred address type should be Home
3. **Send Mail Not Checked and Not Marked No Valid Addr**
  - Check for a Returned Mail/Bad Address note. If there isn’t one, Send Mail needs to be checked on the address. If there is a Returned Mail/Bad Address note, No Valid Address needs to be checked on Bio 1.
4. **Country Not Equal to United States**
  - Country should be United States if send mail is checked. If it is a foreign address (review Country field), uncheck Send Mail on the preferred address. We do not mail to foreign addresses.

**5. Former Address Marked Preferred**

- Previous address type is marked preferred, and Send Mail is not checked. A valid home address type exists on the record with send mail and just needs to be marked as preferred.

**6. No Valid Address Marked on Only One Spouse Recrd**

- Review both spouse records to determine if one has a newly updated address. If the address is the same on both, uncheck Send Mail and mark No Valid Address on Bio 1 of the spouse who needs it. If one spouse has an updated address, share the address with the other spouse and uncheck no valid address.

**7. Blank Preferred Address**

- Uncheck send mail and mark no valid address if there is no other address on the record.

**8. Blank Address Info Source or Blank Date**

- Preferred address Info Source or Date From is blank.  
 Info source = Advancement Services. Date From = Date last changed. See below example.

Row	Constituent ID	Preferred Address Date Added	Preferred Address Date Last Changed	Preferred Address Type	Preferred Address Added By
1	[REDACTED]		11/20/2018 8:45:44 AM	Home	ss82
2	[REDACTED]		11/16/2018 9:22:04 AM	Home	lls112

**9. Future Date From on Preferred Address**

- Correct the Date From on the preferred address to the Date Last Changed

**10. No Valid Addr & Note Type NOT Retrnd Mail**

- Change note type to Returned Mail/Bad Address, or add a notepad for the address that is bad if one does not exist.

**11. No Valid Address - Add Stop Date**

- The Date To on the address = Date Last Changed

Row	Constituent ID	Preferred Address Import ID	Preferred Address Date Last Changed	Preferred Address Last Changed By
1	[REDACTED]		10/10/2018 9:35:42 AM	adf92
2	[REDACTED]		10/3/2018 9:23:32 AM	adf92

**12. Physical Home Address is a PO Box**

- Physical Home type should be where an actual property is located, not a PO Box. Update to Home type if one does not exist already or change to Previous.

**Education Audit Queries**

Banner is heavily utilized for this dashboard. Training might be needed.

Banner screen: SHADGMQ

**1. Former Students without Texas State Education**

- Review in banner to add education relationship to record. If they did not graduate, degree = No Degree and Date Graduated should be blank
- 2. Education Marked Primary No Degree**
    - If the student has not graduated and has No Degree on their education, uncheck the primary degree box
  - 3. Alumni and Education = No Degree**
    - Research education in Banner and provide degree/Check if degree is duplicated
  - 4. Certificate Only and Alumni**
    - Constituents with only a certificate are not considered alumni. Review in banner to verify there is no other degree before changing constituency to Former Student
  - 5. Student Constituency But Educ Has End Date**
    - Verify if current student in banner under SFAREGF and the current term—if so, remove date left on education relationship. If not current student, change constituency code to Former Student.
  - 6. Blank Grad Date & Degree Not Blank = Fmr Student**
    - Verify graduation date in banner and add to education relationship
  - 7. Class of Blank Grad Date Not Blank**
    - Constituent has a graduation date but not a primary education Class Of. Update to match first degree graduation date.
  - 8. Primary Education Not Marked**
    - Alumni has education that isn't marked primary. Look up in Banner to verify and check education as primary.
  - 9. Alumni and Education is Blank**
    - Research education in Banner and add to Alumni record. All Alumni should have education.
  - 10. Former Student with Degree**
    - Former students should not have a degree listed. Update degree to No Degree.
  - 11. Former Student/Alumni Blank Degree**
    - If alumni, review in banner to add correct degree. If former student, degree = no degree
  - 12. Class of Populated for Non-TXST Education**
    - Class Of should only exist on TXST education. Remove from Non-TXST education relationships.
  - 13. Indiv/Student and Education=No Degree**

- Further research in Banner will need to be done to determine the correct constituency that is needed for each constituent.

#### **14. Degree Unknown and Alumni**

- Further research in Banner will need to be done to determine the correct Degree for the Alumni

### **Constituency/Alias Audit Queries**

#### **1. Constituent Code = Indiv plus One Other Code**

- Individuals should not have more than one constituency. Review and delete the incorrect code.

#### **2. Banner ID Missing – Student or Prosp Student**

- Search in Banner for the missing Banner ID and add under Alias

#### **3. Alumni and Individual Constituency Code**

- Constituent has both an Alumni and Individual constituency code.

#### **4. Banner ID but Alias Type is Incorrect**

- Correct alias type to Banner ID

#### **5. Constituent Code Date Not Blank**

- Delete date on Constituency code

#### **6. Prospective Students with Bounced Email**

- Need to research in Banner and update as student, former student or individual if they never attended

#### **7. Banner ID Constituency not Student/Alumni**

- Need to research in Banner and update as student, former student or alumni. They should be an individual if they never attended—use default “Individual constituent verified no alum” and F5. If the constituent is a former or current Faculty/Staff member, please submit to [ua-support@txstate.edu](mailto:ua-support@txstate.edu) for review.

#### **8. Blank Constituency Code**

- Add correct constituency code

#### **9. Parent/Family With No Child Relationship**

- These need to be researched to see if a child can be located or if they are actually a past parent.

#### **10. Prosp Parent but Child is Former Student**

- Change Prospective Parent constituency code to Past Parent/Family

#### **11. No Past Parent/Family but Child is Alumni**

- These need to be researched to see if the child (Alumni) relationship is accurate, if yes add a Past Parent/Family constituency code. If an individual, overwrite that with Past P/F.

#### **12. Inactive Record & Constituency NOT Indiv**

- Verify the constituent's information and review notepad(s) and re-evaluate if the record should still be marked 'inactive'.

#### **13. Student Constituency Primary**

- Correct the constituency hierarchy

#### **14. Combined Addressee Incorrect**

- Correct the combined addressee using the Addressee and Salutations How-To

#### **15. Combined Salutation Mr. and Ms.**

- Salutations for a female with Ms. should never be combined with the male. Separate the salutations with the constituent who has the relationship to Texas State first.
- EX: John Brown is an alumni and Janet Smith is his wife. The Addressee/Salutations should be as follows:
  - i. Combined Addressee: Mr. John Brown and Ms. Janet Smith
  - ii. Combined Salutation: Mr. Brown and Ms. Smith
  - iii. Informal Salutation: Janet and John

#### **16. Blank Informal Salutation**

- Correct the "Informal Salutation" lines using Addressee/Salutations How-To

### **Bio Audit Queries**

#### **1. Spouse Not Blank Marital Status Not Married**

- Update marital status to Married

#### **2. Primary Email not Email or Business Type**

- Update the email type marked primary to Email as long as it isn't marked former/inactive. If so, unmark Primary and check inactive/mark former.

#### **3. Email Type but Incorrect Email Format Used**

- Update type to correct phone type, or add the '@' if the email is missing it. If the line is blank, delete it.

#### **4. Spouse Info Exists Reciprocal Blank**

- Click on Spouse and update reciprocal

#### **5. Alternate Email Exists Not Email**

- Change from Alternate Email to Email and mark Primary.

#### **6. TXST Employees Add Email**

- Add/update Texas State email as type = Email. This should be their netID@txstate.edu
- 7. Blank First Name**
  - Research first name. Review relationships for student; search under emergency contact in Banner for name.
- 8. Alumni with txstate Email or Alternate Email**
  - Texas State email should be former and the personal email preferred.
- 9. Last Name Field Contains Suffix**
  - Move suffix to correct field and delete from the last name box
- 10. Blank DOB with Banner ID**
  - Use Banner to update DOB in RE
  - If unable to find DOB in Banner, further research in Lexis will be needed.
- 11. Email Address Format Incorrect**
  - Correct the email address formatting
- 12. Banner ID Doesn't Begin with A**
  - Update Banner ID to begin with A, or change Alias Type to Paciolan, if necessary
- 13. Current Phone Type Marked Inactive**
  - Show inactive phones and emails and research whether this email should be valid or not. Look in the Notes, JIRA or LexisNexis.
- 14. Phone or Email Number is Blank**
  - A phone type is populated with no number. Delete this line.
- 15. Phone Number Format Incorrect**
  - Research these numbers to see if you can find the correct one. Otherwise, mark as former and inactive.

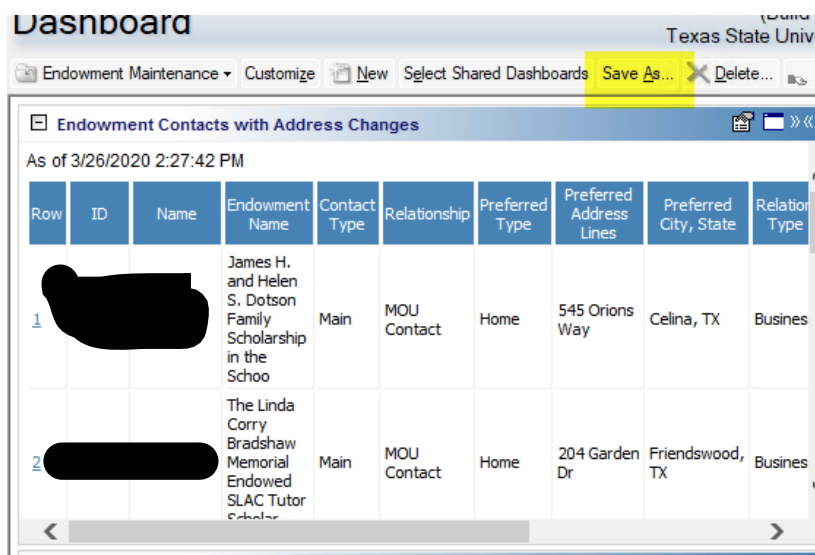
## Employment Audit Queries

- 1. NetCommunity Address Date From = Blank**
  - Use Date Added output in query to update the Date from field on the preferred address
- 2. Blank Recip/Relation on Org Relationships**
  - Update Employer/Employee Recip and Relation codes on employment relationship
- 3. Relationship Not Equal to Employer**
  - Update relationship code to Employer on employment relationship
- 4. Primary Business with Stop Date**

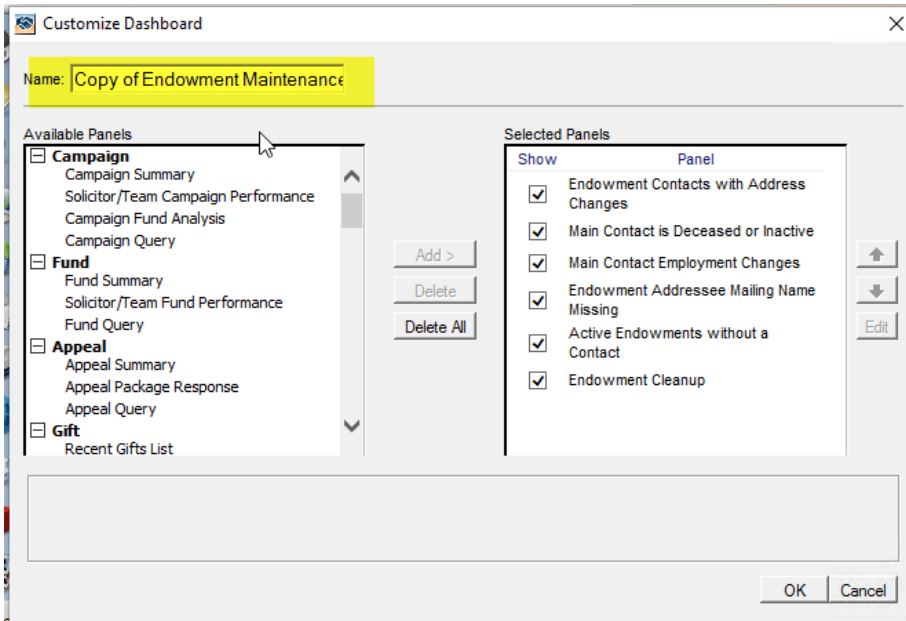
- Research business to see if it's valid. If the business is primary, it should not have an end date.
- 5. Reciprocal Relationship Incorrect**
    - Reciprocal on employment relationship should be one of the following:  
Employee, Former Employee or Retired Employee
  - 6. Employee Reciprocal but Employee Not Checked**
    - Review relationship to verify if employment row should be ended. If so, add date to and change reciprocal to former employee.
  - 7. Employment Info Source**
    - The employment relationship should have an info source populated on the Attributes/Notes tab. If they have a valid LinkedIn, use that as the source. If they recently gave a NetCommunity gift, use that as the source.
  - 8. Email Address Employment NO Primary Business**
    - Email has a domain with a business name but is missing a business relationship. Research and add employment.
  - 9. Employee Recip but Not Marked as Employee**
    - Employment needs to be researched to see if they still work at the organization listed. If so, check employee box. If not, change reciprocal to Former Employee.

### Dashboard Updates and Maintenance

1. Choose the dashboard in RE that you want to copy and click “Save As”.



2. When the Customize Dashboard box pops up, you rename the dashboard and click 'OK'.



- Once the dashboard is saved, you will need to share it with appropriate groups to allow others to access it. On the right side of the Dashboard panel, click “Sharing”

