

Ellucian Advance Database

(Version 9.10.0)

Data Entry Standards Manual

These guidelines establish measures for the protection, access and use of The University of Maryland, Baltimore (UMB) Advance Database. Advance is used to track alumni, donors, and friends of UMB for fund raising purposes. The system is managed by the Computer Support Services of the Office of Development and Alumni Relations.

**1.0 Data Integrity**

Data are a vital asset owned by UMB. All institutional data, whether maintained in the central Advance database or copied into other data systems (e.g., personal computers) remains the property of UMB. Access to data should not be approved for use outside a user’s official UMB responsibility. Data will be used only for authorized tasks.

**Accuracy and the standardization of all data entered into the Advance system are essential to maintain data integrity.**

1. **Creating and Managing Records**

**2.1 Rules for Clean and Accurate Records**

**SEARCH first.** Before users create a new record for a person or non-person, users MUST conduct a complete ID and name search to ensure that the person or non-person has not already been entered in the Advance database. Each user must conduct a thorough search to prevent entering a duplicate record. Duplicate records create problems in multiple parts of the system and take many hours of staff time to locate, merge data and remove**.**

**Follow data entry rules**. Some data fields have specific data entry rules. See that data elements specific section for its data entry rules. Except where specifically noted, avoid abbreviations.

* Abbreviations: If there is enough space, do not use abbreviations. When an abbreviation

is required, use the abbreviated form set out in these Data Standards. If you cannot find a

needed abbreviation in these Standards, contact UMB Development Research for the

proper abbreviation to use.

**Punctuation:** With few exceptions, use punctuation in the name fields or the address fields. Hyphens, periods (e.g., St. John), and apostrophes (right single quote marks or acute accent marks only) are used in the name fields when part of the legal name. Use periods after a first or middle initial. Further, you may use a slash or a hyphen in address fields when required for clarity.

Check your spelling and accuracy! Accuracy is more important than speed.

**2.2 Duplicate Records Management**

A duplicate record – the duplication of the same person or entity in Advance is a serious problem. The Advance ID is the assigned system number that connects all that data that is associated with that Advance ID. An Advance ID number record can represent a person or non-person (e.g., corporation, foundation, other organization).

**When duplicate records are identified, UMB Off ice of Development Research must be notified to properly handle the incorrect ID**. Development Research will coordinate the cleanup effort and begin the process that includes:

* Moving the data from the duplicate (in-error) record to the correct record as required
* Disabling the duplicate (in-error) record so that it cannot be accessed.

**2.3 Schools/Offices Authorized to Create Records**

The following Schools/Offices shall have the ability to create new records as specified below:

|  |  |
| --- | --- |
| **Record Entity Type** | **School/Office** |
| Alumnus, Employee, Other Individual, Parent, Student | All University SchoolsUMB Development ResearchUMB Development Operations |
| Corporation, Foundation, Family Foundation, Other Organization, Donor Advised Funds, Fund-Raising Consortia, Other Organization | UMB Development ResearchUMB Development Operations |

The absolute minimum data necessary to create a new entity in Advance is a name. However, to meet University data needs and to ensure data integrity and accurate record-keeping, the following data should also be captured where pertinent to the type of record being created.

* Address and/or telephone number
* Gender
* Birth date
* Student ID number (if creating a record for a current UMB Student)

At various points in the building of new records, some of this data may not be available. If none of the information noted above is available, data entry personnel should verify with a supervisor whether it is appropriate to add the new entity. **If adding the entity is appropriate, data entry personnel should contact UMB Development Research to obtain the necessary information before creating the record.**

**3.0 Data Entry Standards**

 **3.1 Identification Numbers**

Perform a complete search before entering a new person or non-person in Advance. **There should be only ONE record for each entity (person or non-person).** Any entities that are in Advance more than once must go through duplicate process. A search may take a few minutes to perform, but correcting multiple duplicate records may take several weeks to complete.

The identification number is a unique number given to each person or non-person entity (e.g., an organization or business) that is considered to be a constituent of the University.

 **3.2 Name Standards**

Enter names in mixed case so that when a name is printed on correspondence, it looks contemporary and professional.

**Person Names**

Only one record and one identifier should exist for each person. It is important to search the database thoroughly before adding a new person to Advance to ensure that the individual does not already exist.

**Formatting**

Enter the first, middle, and las names exactly as the person has indicated. If given the full middle name, enter the full middle name. Do not change a full name to an initial. Always use normal mixed case letters for names. The objective is to print the name on mailings, correspondence, etc., just as the “customer” wants it to be printed.

**Case**

If the person has written all uppercase letters, enter the normal mixed case letters. If the person’s name starts with a lowercase letter, enter the first letter in lowercase (e.g., duBois).

**Initials**

Do not use an initial for the first name unless the name appears as such on accepted name documentation. In those instances in which a single character or initial is designated as the first name and is followed by a middle name, enter the single character or initial in the first name field with a period and the middle name in the middle name field.

**Punctuation**

Enter hyphens, apostrophes, and periods when they are part of the legal name. Do not enter punctuation where there is none. Do not enter spaces before or after hyphens in hyphenated names.

**Spaces**

Spacing in names is based on the legal name. Maintain the spaces indicated by individuals (e.g., Van Canneyt, de la Cruz).

**Multiple, First, Middle or Last Names**

When entering the names of users with multiple first, middle, and/or last names, enter the names identified on the documentation. For example: When entering Shi Su Wei Liu, appropriate documentation must be used to determine the first (Shi), middle (Su Wei), and last (Liu) names. When no documentation is present which breaks down the 1st, Middle, Last, enter Gwei Hung Herb Tsai as Gwei (1st); Hung Herb (Middle) Tsai (Last). The standard would be to put multiple names in the middle name field.

**Prefix or Title**

Do not enter prefixes in any of the name fields. Enter the standard abbreviation for the prefix using the dropdown menu in the prefix field. It is UMB practice to not enter a marital status unless requested by the individual. If no preference is indicated, males are entered with Mr. and females are entered with Ms.

The Prefix default for UMB is *Mr.* or *Ms*.

**Suffix and Prof Suffix**

Do not enter suffixes in any of the name fields. Enter the standard abbreviation for the suffix using the dropdown menu in the suffix and prof suffix fields.

Enter both a prefix and suffix when the person has an inherited suffix (e.g., Mr. John Doe, Jr.). Both a prefix and suffix can be used for individuals who are in the military, are retired military, or are in religious orders (e.g., Gen. Frank Smith USA (Ret)).

Do not enter a suffix indicating an academic or medical degree if you have entered a prefix. Therefore, the prefix and not the professional suffix will be used. For example, do not enter a prefix of Dr. and a suffix of M.D.; rather, enter the prefix only (Dr. James Smith, not Dr. James Smith, M.D.)

**Alternate Names**

Alternate names are other names that an individual would be known by (or has been known by). Alternate names may include: maiden names, also known as, previous married name, professional name, birthname, etc. Alternate names are stored in Advance in the Names field in the Biographical screen.

**Non-person Names**

Non-person entities can be companies, organizations, or entities doing business with the University in a professional capacity. Only one record and one identifier should exist for each non-person. It is important that you search the database thoroughly before requesting that a new non-person entity record be added to Advance.

* **Adding a non-person entity record to Advance** – Submit a request to the Office of Development Research & Prospect Management using the Entity Add Request form available on the Development Research tab of the DevService website. <http://www.umaryland.edu/development/devservice/index.asp>

**3.3 Address Standards**

University-wide conventions are critical for shared data such as addresses and the purposes for which the information is entered should be considered. For example, units with marketing responsibility, such as Development and Annual Giving, must be able to produce individualized correspondence conforming to formal addressing rules. These standards must balance four considerations:

* Advance system requirements
* Accepted standards for formal communications
* US Postal Service guidelines
* International address requirements

All addresses must meet US Postal Service addressing requirements. Several US Postal Service publications deal with addressing. The most comprehensive and accessible publication is Postal Addressing Standards Publication 28. This publication is available at <http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>

The guidelines expressed herein are designed to convey the convey the minimum standard requirements to enhance the processing and delivery of mail, reduce instances of “undeliverable” mail, and position the University to obtain the most advantageous postal rates.

While data may be conditioned (or reformatted) on output, it is the intention that addresses be entered exactly as they will print on correspondence, reports, etc. Accurate, consistent address data entry is vital. Given these considerations, the following data entry standards are recommended.

**Address Types**

Address type is designated using the dropdown menu in Advance.

**Street Standards**

Case

Enter all information in mixed case; never use all uppercase or all lowercase letters.

Punctuation

Street names should be spelled out in their entirety whenever possible.

Use punctuation when appropriate.

Note: Street designators such as “road”, “street”, “boulevard”, etc. may not be abbreviated unless necessary due to space restraints. See the topic, **Street Designators and Postal Abbreviations**.

Address Lines

Advance provides three lines for street address. Do not enter city, state, and zip code data on any of these three address lines for U.S. addresses: enter these in the City-State-Zip fields.

Note: Although Advance does provide three Address Lines, three-line street addresses cause a problem when printing one inch labels since the completed address could be five to six lines once other lines – Name, the optional “In Care of”, and City-State-Zip are added. Therefore, make every effort to enter the address using two lines if possible.

Examples:

* If there is an apartment/suite number, enter it on the second line. Only the house number and street name should be on the first line:

|  |  |
| --- | --- |
| **Advance Address Line 1** | 123 Main Street |
| **Advance Address Line 2** | Apartment 45 |
| **Advance Address Line 3** | (not used) |

Street Number

For addresses in which the street name is a number from 1-10, spell out the number. For numbers 11 and above, use the number itself with the appropriate suffix( i.e., the “nd” in 42nd). For example:

* One First Avenue
* Two 68th Street
* 123 Fifth Avenue
* 11 42nd Street

Street Name

Where character field length allows, type the street name in full. If abbreviations are necessary, use the standard postal service abbreviation for a street designator rather than abbreviating the street name. If you must abbreviate the street name, make sure the end result is not confusing. For example, do not abbreviate “Saint” as “St.” in street names as this could easily be confused with the standard abbreviation for street.

For addresses in which the street name is a number, enter the street name as supplied by the person. Numbered streets are usually entered as a number with an appropriate suffix, but you may spell them out if they are supplied that way. For example, “955 73rd Street” or “100 Fifth Avenue.”

Street Designators and Postal Abbreviations

The preferred format is to spell out all address suffixes or street designators such as Road, Street, Avenue, etc. However, Postal Service standard abbreviations are acceptable where the street name is too long, making it necessary to abbreviate the street designator.

Secondary Address Unit Indicators and Postal Abbreviations

Second address units should always be entered on the second line of the address field.

If you have space, spell out secondary address identifiers or unit designators. However if space is a problem, you may use the following abbreviations:

|  |  |
| --- | --- |
| **Description** | **Abbreviation** |
| Apartment | Apt. |
| Basement | Bsmt. |
| Building | Bldg. |
| Department | Dept. |
| Floor | Fl. |
| Front | Frnt. |
| Key | Key |
| Lobby | Lbby. |
| Number | No. |
| Penthouse | Ph. |
| Pier | Pier |
| Rear | Rear |
| Room | Rm. |
| Side | Side |
| Slip | Slip |
| Space | Spc. |
| Suite | Ste. |
| Tower | Twr. |
| Trailer | Trlr. |
| Unit | Unit |
| Upper | Uppr. |

Compass Directions and Postal Abbreviations

Always spell out compass directions (except for a double directional such as Southwest) unless space prohibits. If space is a problem use the standard abbreviations in the table below. For example:

* 234 Jackson Street North
* 1222 S.W. Morris Street

An exception to the above rule is when the street name itself is East, West, North, or South and includes a directional; the directional will be abbreviated with periods. For example:

* 15 N. East River Road
* 867 N. West End Avenue

|  |  |
| --- | --- |
| **Description** | **Abbreviation** |
| East | E. |
| West | W. |
| North | N. |
| South | S. |
| Northeast | N.E. |
| Northwest | N.W. |
| Southeast | S.E. |
| Southwest | S.W. |

Special Characters

If you receive an address with just a number at the end of the street, assume this number to be an apartment number. Use the abbreviation “No.” for number when necessary (e.g., Lodge No. 123).

Use hyphens and slashes when needed for clarity and for designating fractions.

Business/organization Address Lines

When entering the business address for a person, the same general rules as described in the previous sections apply to these addresses.

**Remember**, for U.S. addresses, City-State-Zip is entered on a separate City-State-Zip line, not in the street address line.

**Important**:

* **The business name is never entered on the street address lines and is only entered in the Employer field on the Business Address.**
* **Do not enter business titles as part of an address. Titles are entered in the Title field of the business address.**

|  |  |
| --- | --- |
| Business Address Line 1 | 365 Boylston Street |
| Business Address Line 2 | Suite 100 |
| Business Address Line 3 | (not used) |

* **Business Name**: If an article (e.g., a, an, or the) is used as an adjective within the full legal name of the business/organization, include it when entering the name in Advance. If the name begins with the word “The”, include it when entering the name.

Examples:

* ABC Trucking
* Diamond Life Insurance
* Smith, King & Jones Inc.
* J.F. Kennedy Co.
* First National Bank
* The Copy Store
* **Abbreviations**: In general do not abbreviate company names. However, only use abbreviations when a company is more widely known by abbreviated name than its full name (e.g., IBM) or when space limitation requires the use of abbreviations.
* **Case**: Enter all information using mixed case and standard capitalization. Never use all uppercase or all lowercase letters, except for acronyms.
* **Punctuation**: Do not add punctuation where there is none. Periods should be used when required as part of the company’s name. You may use apostrophes, but do not use spaces before or after the apostrophe unless it comes at the end of a word. Use commas between names. You may use hyphens or slashes to separate names, but do not use spaces before or after the hyphen or slash. Use the ampersand only when it is part of a formal name. Use “and” in all other cases.

Examples

* R.J. Reynolds Co.
* F. & F. Securities
* Amazon.com
* John’s Plumbing Supply
* Four Wives’ Club
* **Acronyms:** If a company is recognized by its acronym, use the acronym when entering its record (e.g., IBM, SCT, ITT, AT&T). Do not use a space between the letters of an acronym.
* **Numerals as Part of a Name:** If a numeral is part of the official corporate name, enter the number rather than spelling out the number (e.g., 21st Century Productions).

**City Standards**

Always enter the city name in the city field. Enter it in mixed case; never use all uppercase or all lowercase letters.

The general rule is that city names will be spelled out. A standard exception is when the city name includes “St.” for Saint and “Ft.” for Fort; then, always use that format.

Compass directions in a city name are never abbreviated (e.g., North Boston, South Bend, West Memphis).

When city names must be shortened, either leave out a word (often the word “the”) or drop the necessary letters at the end of the name so it will fit the line. For example:

|  |  |
| --- | --- |
| For: | Use: |
| Manchester-by-the-Sea | Manchester-by-Sea |
| Rancho Santa Margarita | Rancho Santa Margar |
| Truth or Consequences | Truth or Consequence |

**Note:** Punctuation is used when it is part of the city name.

**State Standards**

The state field is used for U.S. Addresses only. Use the Advance dropdown menu for the standard code for U.S. states and territories (U.S. Virgin Islands, Guam, etc.).

Military Destinations

Military addresses should be entered exactly as indicated. No abbreviations are changed when entering a military address. Military destinations are considered U.S. addresses and have U.S. zip codes. Enter the APO or AFO code in the city field and choose the appropriate state code from the dropdown menu.

**Zip Code Standards**

Zip codes must be entered for all U.S addresses. Do not enter a zip code for an international address.

If the zip+4 information is available, enter it in the zip field. The hyphen must be used when entering the entire nine-digit ZIP code.

**International Addresses**

In general, international addresses follow most of the same guidelines used in entering U.S. addresses. That is, all information should be in mixed case format; never use all uppercase or all lowercase letters. As much as possible use the abbreviations and formats provided in the section of street address lines.

According to U.S. post office guidelines, the following shows the order of information for international address.

|  |  |
| --- | --- |
| Advance Line 1 | Name of Addressee |
| Advance Line 2 | Street Address or P. O. Box Number |
| Advance Line 3 | Additional Address |
| Advance Line 4 | Town/City of Country and Postal Code**Note**: In some countries, the postal code may precede the city or town name. |

Examples:

Ms. Joyce Browning

2045 Royal Road

London WIP 6HQ

ENGLAND

Ms. Joyce Browning

2045 Royal Road

06570 St. Paul

FRANCE

**Country Standards**

The country code field is used only for international addresses. Always leave this field blank when entering a U.S. zip code (included entries for military destinations and U.S. territories, such as Puerto Rico, Guam and the U.S. Virgin Islands).

According to Postal Service regulations, the name of the foreign country must be printed alone in all caps on the last line of the address for outgoing mail. In Advance this is accomplished by selecting the two-character alpha code/country name from the list in the country code field table.

**Updating addresses**

When adding a subsequent address of the same type, stop (end)-date the prior address and change its status to “inactive” in the status field. Then add the new address. Do not change or delete a prior address unless correcting an initial entry error.

**3.4 Telephone Standards**

**Telephone Types**

Enter all regional and local telephone numbers using the ten-digit format. A telephone type distinguishes each telephone number entered in the Advance system.

**Domestic Telephone Numbers**

The telephone number is presented in a three-field format:

* Area Code – The three-digit area code must be entered for all phone numbers.
* Phone Number – The seven-digit phone numbered entered with a hyphen.
* Extension – The extension number, if provided. Do not enter “EXT” or “X” in the field.

When adding subsequent telephone numbers of the same type, stop (end)-date the prior telephone number and then add the new telephone number. Do not change or delete the prior telephone number unless correcting an initial entry error.

**International Telephone Numbers**

The international phone number field has a 16-character limit. Enter all three parts of an international number (i.e., the country code, the city code and the telephone number) in the international phone number field using no parentheses or hyphens.

For example, a telephone number in Japan, consisting of country code 81, city code 03, and telephone number of 7599311 would be entered as 81037599311. **As this number is only 11-characters, you will need to add leading zeros at the beginning of the entry to equal the field character limit or the number will not be saved in Advance.** Therefore, the number becomes 0000081037599311.

**3.5 Email Standards**

**Email Types**

An email type distinguishes each email entered in the Advance system. When entering an individual’s email address, a type needs to be selected using the dropdown menu in Advance.

The preferred box should be checked on the email address that is designated as the primary, preferred email address of the individual. If the preferred email address is unknown, then leave the box unchecked.

An entity can have multiple email addresses.