

Case study: The University of Western Ontario

QAS for PeopleSoft
Guarantees the Quality
of Alumni Contact Data



Situation

The University of Western Ontario's Department of External Relations upgraded to PeopleSoft Campus Solutions 8.9 and wanted to ensure all data submitted to the new system was accurate to eliminate time-consuming and inefficient data maintenance tactics.

Solution

Western installed QAS for PeopleSoft, an Oracle-built, integrated product for PeopleSoft systems that verifies address data in real-time as it is captured by any of the external relations departments.

Results

Now only clean, verified alumni data is submitted to Western's database ensuring the deliverability of critical mailings, supporting outreach initiatives and significantly reducing 'lost' alumni.

A Growing Alumni Database Highlights Operational Inefficiency

The University of Western Ontario was founded in 1878 and, as one of Canada's oldest universities, has approximately 250,000 alumni. With 25,000 undergraduate students and 5,000 graduate students, that universe is constantly growing. Western's external relations departments – alumni relations, the foundation, development, public affairs and advancement – use Oracle's PeopleSoft Campus Solutions to manage alumni data, most recently upgrading to version 8.9 of the platform. Despite the benefits of the recent upgrade the new system was not able

confirm the quality of data captured and high rates of communication in the form of newsletters, donation requests and solicitations, to name a few, were always returned after campaigns. That bad data was also impacting initiatives that aim to connect faculty and students with school alumni.

The advancement services department at Western is charged with maintaining the PeopleSoft system and corresponding alumni database, the contents of which are used by all of the external relations groups to promote and raise funds for the university. The group found it almost impossible to keep up with changing

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addresses and estimates on 'lost' alumni were staggering, especially considering the time, money and personnel resources it had invested in back-end maintenance efforts.

"In the beginning when the database was smaller record keeper positions would go in and trace people who where lost or whose addresses where not correct," stated Drew Martin, Associate Director of Advancement Services, Western. "The volume of lost addresses became very overwhelming within a couple of years and about 30 to 35 percent of our alumni base was lost in tracing."

Experian QAS Offers a Seamless Solution

When external relations rolled out Campus Solutions 8.9, the advancement services team capitalized on an opportunity to deploy real-time address verification anywhere an address was accepted or updated. Western decided to join the ranks of schools such as the University of Texas at Arlington and the University of Maine System and opted to deploy Experian QAS' fully integrated offering – QAS for PeopleSoft.

QAS for PeopleSoft was built by Oracle Consulting in conjunction with Experian QAS to make it especially easy for PeopleSoft campuses to deploy address verification. The integration typically takes less than a day to get up and running and in the end simultaneously facilitates address capture while verifying the data in real-time. The product corrects most address data element inaccuracies automatically behind the scenes, only interacting with end-users when absolutely necessary.

"When looking for a front-end address verification tool it was very important that we found a product that could work well with our PeopleSoft application," said Martin. "We wouldn't

have gone with anyone else." The integration is also customizable. Western was able to change formatting to fit its system by changing the capitalization of the city and wording around a building name or number.

The integration uses Experian QAS' web service interface along with the PeopleSoft Integration Broker to add real-time verification functionality to the Campus Solutions address entry screens. The only prerequisite for implementation is a properly configured Integration Broker; it must be set up to communicate with third party applications in order to work with the Experian QAS API. The implementation itself is achieved through the use of a generic integration engine which can then in turn be configured for each PeopleSoft address page. This method reduces the coupling between QAS and PeopleSoft components which means that system upgrades are minimally impacted.

QAS for PeopleSoft integrates into the main address record within the PeopleSoft module so that in most cases, a single integration will cover most, if not all, of the address touch points within a given module. The functionality can be enabled by user group, giving administrators full control over deployment when rolling the solution out campus-wide.

Deployment went very smoothly for Western. "The staff found that the product was very user friendly and were thrilled," stated Lorraine Ollson, Business Specialist of Advancement Services at The University of Western Ontario, who is responsible for looking at businesses processes within the external relations department and identifying more efficient, automated methods to prevent workflow bottlenecks between and within the various groups. "We have never received any negative feedback and have had very few call backs with questions."

Accurate Database Bolsters all External Relations Efforts

Improved data quality through a tight-knit PeopleSoft integration has already created process efficiencies and improvements in communication with alumni and donors for Western. Most importantly, communication like fundraising solicitations, event invitations and alumni magazines reach their intended recipients on the first try and alumni programs and initiatives are supported by accurate contact data.

Also, the advancement services staff spends fewer man hours researching and tracing address data on returned pieces. The reduction in time spent researching addresses has allowed staffers to take on wider responsibilities. Most recently they were able to support an initiative called 'Backpack to Briefcase,' a career services program that connects alumni with current students.

Lastly, Western's address data quality efforts have dramatically impacted the amount of money wasted on mailing documents to inaccurate addresses. All of the groups in external relations now make better use of their postage and printing budgets.

There is now a greater perceived value in the Western central database, boosting the advancement department's position in university fundraising. "The tool is efficient and accurate," stated Janice Van Der Klugt, Operations Administrator for Advancement Services, who is responsible for gift and pledging information and donation processing at Western. "The product has added a great deal of value to our PeopleSoft system."

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