

Standard Info	Name, First – Preferred		
	Reference ID	EDS 4.15	Date 3/12/2021
	Asset Classification <this document> link	Public Information	
	Data Classification <data element> link	Public Information	
	Data Steward for Data Element	Vice President for Diversity, Equity & Inclusion	
	MDM / RDM	n/a. This data element is not a candidate for Master Data Management or Reference Data Management.	
	Custodian of this Standard	Program Manager, Data Standards	
	Contact	Todd Davis	td25@mailbox.sc.edu
	Status	Approval Pending by Julian Williams.	
Data Standard Overview	<p>This document establishes the parameters of the data field to be known as “Name, First – Preferred”.</p> <p><u>Purpose and Use</u> This data element is to be made accessible for individual constituents across the UofSC System to self-record their personal preference by the end of Q2-2021. It will not be immediately possible to use the data element in any information system, and additional projects will follow to assess feasibility of integrating this data element into other university systems and data sources.</p> <p><u>Required Actions & Procedures</u> Changes to the parameters of the data element, and revisions to this standard, require consideration and approval by the Data Steward and/or a stakeholder group of that individual’s designation.</p> <p><u>Justifications</u> This data element fulfills longstanding administrative promises to enable persons to indicate their preferred first name, especially as pertains to diversity, equity, and inclusion.</p>		
Definition (functional)	The first name by which a person wishes to be known and is commonly known by others. It is generally favored by the person for casual and personal communications, and will not be used for official identification and correspondence.		
Also known as	Preferred First Name		
Disambiguation	This data element is differentiated from “Legal First Name”, which is commonly referred to as “First Name”.		

Caveats and Exceptions	<p>(1) The presence and visibility of the data element in various university information systems and databases will take significant time to accomplish, beginning in Q3-2021; each integration or data feed revision will be under a unique Demand # with DoIT.</p> <p>(2) The Data Steward and stakeholders should consider whether some user guidance/constraint is required for this field, such as the Preferred First Name expressed by an individual must not be offensive or degrading to any individuals or groups.</p>	
System of Record	Oracle Identity Manager (OIM) with myAccount.sc.edu as user front end	
Data Cookbook Entry / Link	<<pending>>	
Metadata	Field Type	Text, Simple
	Field Length	30 character length Known constraint: among the known ERP systems expected to receive and make use of this data element PeopleSoft has the smallest length at 30 characters.
	Keyboard/character set permitted	UTF8 – an externally maintained, international, Unicode Standard of English alphabet characters, including those with accents, as well as hyphen (dash), space, and apostrophe are permitted.
	Disallowed keyboard/characters	Numerals, symbols, emoticons, emojis, non-English alphabet, and special characters including but not limited to ~ ` ! @ # \$ % ^ & * () , . / ? > < ; : "] [{ } \ = + _ are not permitted.
	OIM Field Technical Name	USR_UDF_PREFERRED_NAME
	OIM Table	USER
	OIM Field Label/Functional Name	Preferred First Name (The label at this time is Preferred or Nick Name)
	myaccount.sc.edu Field Technical Name	USR_UDF_PREFERRED_NAME
	myaccount.sc.edu Table	USER
	myaccount.sc.edu Label/Functional Name	Preferred First Name
Business Processes	Initial Collection	Any employee and/or student may submit a Name, First – Preferred through myaccount.sc.edu which will be

	<p>transmitted and stored in OIM as the system of record, with a timestamp indicating the date and time submitted.</p> <p>No review or approval is required of submitted values; however, the Data Steward has the right to review and compel changes when/if a complaint is reported with a value submitted by an individual. In extreme cases, the Data Steward has the right to remove the offensive values with notice to the appropriate user.</p>
User Change	<p>Any employee and/or student may submit a different Name, First – Preferred through myaccount.sc.edu, no more than once per 12-months (beginning on the date of the most recent change). Submitted values will be automatically processed into OIM with a timestamp. Prior values and their timestamp will be logged and retained in the system of record.</p>
Administrative Change	<p>In the event a user enters an unacceptable value, as determined by the Data Steward, or inadvertently submitted an unintended value (e.g. typo), a Service Request can be submitted through DoIT requesting a system administrator manually correct the value, and is not constrained by the 12-months rule for User Change.</p> <p>Business processes may need to be considered and authorized by the Data Steward to grant DoIT parameters and/or authority to make such changes without having to get Data Steward approval per each.</p>
Data Feeds & Integrations	<p>A system owner (aka Receiving Data Steward) may request this data element be added to an existing or new data feed by submitting a Demand to DoIT through https://sc.edu/ithelp; the earliest date such work is likely to start is July 1, 2021. The anticipated priority systems for integration are Banner, PeopleSoft HCM, Blackboard, and Office 365.</p> <p>Requests will be forwarded to the Data Steward for this data element for consideration, including approval and prioritization/scheduling; other governance groups, including but not limited to the Student Systems Council and Administrative Systems Council, will need to approve, prioritize, and schedule the actual effort.</p>
Metrics and Reporting	<p>DoIT shall report the number of submissions received, by constituent type and date, and provide a summary</p>

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	dashboard with visualizations at analytics.sc.edu; access to the reports will be at the direction of the Data Steward.		
Acknowledged Stakeholders	<u>Stakeholder</u>	<u>RACI</u>	<u>Status</u>
	Williams, Julian (VP-DEI) – Data Steward	Responsible	Accepted
	Marterer, Aaron (Registrar)	Consulted	Proposed
	Lee, Stacy (HR)	Consulted	Proposed
	Byers, Rick (DoIT)	Accountable (Custodian)	Accepted
	Malone, Shay (Student Life)	Consulted	Proposed
	Kelly, Mike (DoIT)	Accountable	Accepted
	Davis, Todd (DoIT)	Accountable (Facilitator)	Accepted
Approval Log	<u>Operational/Functional Area</u>	<u>Authorization</u>	<u>Date</u>
	VP-DEI – Data Steward	Williams, Julian	3/12/2021
	Registrar	Marterer, Aaron	3/5/2021
	HR	Lee, Stacy	3/5/2021
	Student Life	Malone, Shay	3/5/2021
	DoIT	Byers, Rick	3/5/2021
	DoIT	Davis, Todd	3/5/2021
	Chief Data Officer (IT executive lead)	Kelly, Mike	3/5/2021
Change Log	<u>Date</u>	<u>Comments</u>	
	3/12/2021	Acceptance of all prior revisions (Track Changes) and preparation for Data Steward final approval (indicate by date in Approval Log above, please).	
	3/4/2021	Revisions based on stakeholder review and comments, removed the questions around policy and 12 months being feasible. There is a university policy, we will use that and work to make the necessary changes to that policy and holding a name for 12 months is possible.	
	2/24/2021	Circulated to working group on Preferred Name by Todd Davis, facilitated by VP-DEI Williams, for review, comment, and changes.	
	1/26/2021	New Standard drafted by Mike Kelly	

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See also	n/a