

Advance Notice

Volume 2, Number 4

April 30, 2004

Project Update

We are nine weeks away from going live with the gift and biographical modules of BSR Advance. To help ensure our ability to go live on July 1, we have initiated a freeze on all new attributes and all new reports. In addition, Carol Hennion has been declared “off limits.” The following is a brief update on bio, gift and reporting:

Bio: The bio conversion, led by Jamie Barry, is on schedule for the July 1 go-live date. Jamie and her team are working tirelessly on quality assurance, testing each piece of conversion data. A freeze on new attributes (codes used to track data on the old system, i.e., Board of Trustees, received \$1M scholarship plaque, alumni board member) was announced on April 1. Any new coding will have to wait until Advance is up and running. Existing attributes can still be updated as we have already written scripts to convert these to Advance and have tested their accuracy.

Gift: The gift data has been converted into the test environment (ADVTEST). Carol Hennion, who is leading this effort, is still determining how we will use Advance to process gifts. Although the majority of the gift data has been mapped and converted into ADVTEST, Carol and her team are still working through numerous conversion issues. As we strive to ensure ample time for the needed training, testing and reporting to go live with gift data, we have removed Carol from her daily tasks as director of information services. She will be unavailable to answer questions and is spending 100% of her time on the conversion project. In her absence, we have asked that development colleagues contact Donna Snyder, Nancy Knauf or Angie Fitzpatrick.

Reporting: Diana Seward and Sheila McMahon are continuing to prepare reports from the legacy system (HP), but are unable to deliver any new reports (HP reports that have never been requested or written before). All completely new report requests will have to wait until the new system is up and running this fall. Dana and Kate are working on the development of gift reporting in Advance (there is a list of approximately 30 reports required for go-live). Our reporting team is working closely with several BSR representatives to make sure we can produce these critical reports by July 1. We have also contracted with report writer and former BSR employee Debbie Follon.

Citrix: Coming Soon to an Advance Near You!

The install of the Citrix server machines is complete, and we are now putting the final touches on the Advance configuration and testing of the application.

This new method of using Advance involves moving a lot of the Advance software to faster central servers and frees us from having to continually update each computer within University Relations as new reports and Advance updates become available. Those using Citrix to access Advance from off-campus will also see a speed improvement.

In order to begin using Advance through Citrix, there will be one last install that we need to do to each

computer. Therefore, access to Advance via Citrix will be rolled out in small groups over the next several weeks, beginning with the off-campus staff. The expectation is that we will have everyone in University Relations using Citrix by the time of our next Advance upgrade in early June .

43 WORKING DAYS LEFT!!!



Phase II Completion

April 30, 2004.....June 30,

If you were asked to name one staff member who seems to be involved in almost every aspect of Development, would your answer be **Mike Brach**? It should be. Mike currently serves as Director of the Annual Fund and Gift Services and Executive Director of the Sorin Society, as well as coordinates the O'Hara Society. As of July 1, his title will be Senior Director of Development, Administrative and Donor Services. Mike will provide strategic direction and leadership for the areas of annual giving, recognition societies, technology & information services, and donor services. He will continue to serve on various committees within Development and will remain a subject-matter expert on the BSR Advance Project Core Team.

Mike and his wife, Patty, and their sons, Christopher (9), Matthew (6) and Jonathan (3) live in Granger. A South Bend native, Mike is a graduate of St. Joseph High School. Having earned a BA in government and international relations from Notre Dame in 1988, he received his MBA from IUSB in 1996. Mike spent his college summers working for Steel Warehouse processing steel coils. After graduation, he worked in the quality control department of the same company. He later secured a job in Notre Dame's Annual Fund (where he met his wife) and worked there for several years before relocating to Denver, Colorado, where he worked for Regis University and the University of Colorado. In 1999, Mike returned to his alma mater and served as director of development for a short time before jumping back into the Annual Fund.

Outside of work, Mike enjoys hockey, basketball and being one of his children's favorite toys. You will often see Mike on campus carrying a gym bag that is almost as big as he. Those who play hockey with Mike have warned others to stay clear of him on the ice. What exactly they are implying is not clear!

Biggest Asset of Advance: "Can be a great tool for communication."

Biggest Challenge of Advance: "Developing the policies to effectively use it and coordinating access to and distribution of the data."

Favorite Music: "I like many different kinds of music from classical to country. I love piano and guitar, but I can't play either of them. So like any good parent I will make sure my kids can."

Favorite Food: "Chicken tetrazzini, Pringles, and anything with chocolate and peanut butter."

Three Adjectives Used to Describe Me: "Confident, visionary, team player."

Three Adjectives Never Used to Describe Me: "Indecisive, thoughtless, timid"

Hobbies: "Woodworking, collecting and repairing music boxes, fixing anything that is broken from electronics to mechanical."

Who in your life has inspired you: "My son, Christopher. He has Juvenile Diabetes and is dependent on many daily blood sugar checks and insulin injections. He helps put everything in perspective."

Mike's contributions to the department are appreciated by many. He recently represented the University at a BSR Sungard User's Conference and has been an asset in the ongoing completion of the conversion process from the HP to the BSR Sungard Advance system. Thanks, Mike, for your dedication!

Mike Brach ENTITY IDENTITY

Richard's Training Corner

It's now day #412 in the Advance Hostage Crisis and things are heating up. I have been told it is no longer politically correct to use "hostage crisis" references, so I won't use them any more, nor will I use them any less. We are quickly approaching the July 1 date, and we just might make it with our sanities intact, though I guess that only applies to those of you who were sane to begin with.

This month, I want to talk about a couple of minor things...this won't be brain surgery – more like a sprained toe nail. First, I want to address contact persons and also talk a little about a known bug in Advance 6.2.

Contact persons – what are they? A contact person is an entity attribute, and as such, they are stored on the prospect tracking summary window in the entity attributes pane in the upper left. If they don't exist, they must be created from the maintenance menu. Contact person is used to store information about those people who serve as gatekeepers for our benefactors. They could be lawyers, financial advisors, administrative assistants, or even agents for athlete donors. This window allows us to enter their name and phone and fax number. A comments field at the bottom allows for additional information. This could and should be used for email addresses, if available. This is the only place we will add these types of folks, even though there are other places available in Advance for them. Those other places are on the prospect and proposal windows where you will find a contacts button. Those should both be turned off so as not to allow users to add data. The bottom line? If you have a contact person to add, add him or her in the entity attributes pane or create it from the maintenance menu.

There is a known bug in Advance 6.2, and some of you have found it. I suppose more may be found before we upgrade to Advance 7.1. This bug occurs when a user opens a note and then realizes they aren't in maintenance mode. When the note is open and the user switches into maintenance mode, this can cause your session of Advance to die. The workaround offered is that the user simply switches to maintenance mode before opening the note. We will be looking at the new version to see if this problem continues or if it will be resolved. This problem has already been reported in the feedback system, so further reporting of it is unnecessary.

Well that's it for this month, as always, if you have any questions or concerns please feel free to call or write. If you have any issues you would like discussed in future issues, give me a holler. I can be reached at rkohler1@nd.edu, 574-631-0993 (office), or 574-261-3636 (mobile)

Thanks!

Richard Kohler

Upcoming BSR Visit

As we prepare for Go-Live, we are planning for another visit to campus from BSR staff. Deb Cunningham, our BSR senior applications consultant, and Tom Scarlett, a BSR senior technical consultant, will be on campus from Monday, May 17 through Wednesday, May 19.

Tom will be working very closely with our reporting team, while Deb will be working with Carol and Jamie on gift and bio conversion issues and training. Both Deb and Tom will attend the steering committee meeting on May 18 and the core team meeting on May 19. We will report to you next month on the progress made during this visit.

Introducing Our New Testing Team!

We are putting together an official team of BSR Advance report testers. As we deliver more Advance reports, we are asking these individuals to help us with quality assurance of the new (or changed) reports. Testers will be asked to serve as such for at least one year, and they will receive some special instructions on what is required of them when a report must be tested.

Here is the game plan: on a regular basis (perhaps weekly) for the next year or so, the team will receive an email about a certain report or series of reports that need to be tested. They will be given specific instructions from the individual who created the report as to how to execute the report and what output to expect from it.

We have a team of 10 who have agreed to serve as official testers. This number will allow flexibility and ensure enough testing before a report is deployed. During weeks when a particular tester is swamped (planning an event, home football game, vacation, etc.), there will still be enough testers available. In addition to the official testers, we are also counting on members of the core team to assist with testing.

The testing team members are as follows: **Angie Fitzpatrick, Judy Furlong, Annie Geary, Nancy Knauf, Kris Machalleck, Peggy Queen, Lori Rush, Laura Shrader, Donna Snyder and Jeanine VanEs.** Thanks in ADVANCE for your assistance with this very important part of the BSR Project!



***A Big Thank
You to our
Editor,
Jen Hengehold, for all her hard work.
We will miss you!!***

Prospect Management Reporting Update

In the last issue of *Advance Notice*, we discussed the enhancements to the entity at a glance report (EAG), which can be run against a single entity or prospect lookup, or against an entire clipboard. This month, we highlight the entity profile reports that have been added during the most recent deployment.

We already had contact reports, entity notes, prospect notes, and proposal notes for three months and 12 months, in order to pull reports or notes written in the last three months and 12 months, respectively. We have added each of the above for the “last month.” We did have a small problem with the prospect notes for three months, so a decision was made to pull it from the current deployment in order to expedite the rollout of all the other reports that are ready to rock and roll. Look for it in the near future.

Along with the bio reports listed above, we also added driving directions and strategy notes. These two reports will pull all notes made with note type “driving directions” or “strategy note,” respectively.

We were able to deploy a gift report as well. Giving detail with totals gives us a report that mimics the giving summary pane in Advance. In the near future, you can look for another version of this report to be restricted to the last five years of giving.

As a reminder, you can access entity profile reports through file/print other/entity profile report. You can run one report or group them together for a more customized report that is better suited to fit your individual needs.