

Advance Notice

Volume 2, Number 2

February 24, 2004

A NEW BEAT FOR ADVANCE

This fall, Development will be marching to the BEAT of a different drummer for football. During the February quarterlies, BEAT, the new tracking system, will be presented and training will take place for all the administrative assistants. BEAT is the Benefactor Event Activity Tracking system. It is a web-based application that will track activity information and tie it with Advance entity and prospect information to allow for reports to be generated. These activities will include tickets, parking, hotels, pre-game buffet and other activities. The new system will populate certain reports automatically once the activity-related data is input into the application. Presented at the training will be the Activity Request form. This form will provide the hard copy request to be forwarded to the proper activity manager, such as **Tim Rippinger** or **Pam Spence**, for processing. Due to security issues, credit card information cannot be transmitted through the computer system. This form will allow the requester to provide the necessary information for requests to be processed. The activity manager will then review this information and provide

confirmation via the application. Once the information is input into BEAT, the requester will be able to print up a report to show what requests have been sent for various activities. Users will be able to generate reports to track the various activities for a given weekend or for an individual entity's activities for all events.

Although not all of the reports have been created, the application is ready to begin accepting requests. So as the BEAT goes on, let's get ready to march like the band with this new system.

90 WORKING DAYS LEFT!!!



Phase II Completion

February 23, 2004.....June 30, 2004

QUARTERLY MEETING TRAINING SESSIONS

The Development Department's quarterly meetings will take place Tuesday, February 24, to Thursday, February 26. This February's quarterly meeting is different from previous ones as it has been designated an "All-Staff" quarterly, like that which we typically hold in October. The BSR Advance core team decided to take full advantage of having the off-campus regional directors and their administrative assistants here and geared much of the Advance training efforts for this audience. On Wednesday from 1-3 p.m., **Richard Kohler** will be offering a training session on prospect management reporting for the RDs and AAs. This same training will be offered to all other fundraisers housed on

campus, as well as their assistants, in March, as we were limited by space and available training computers. On Thursday, Richard will offer two sessions: from 2-3 p.m., he will be focusing on a new clipboard tool in Advance, and from 3-4 p.m., he will focus on the Benefactor Event and Activity Tracking (BEAT) application. These two sessions are for all administrative assistants who work directly with fundraisers (This means AAs of PGDs, RDs, NPOs, NPADs, and PGOs, if you are following the new abbreviations from the agenda!). Richard has sent all expected participants an email invitation and is looking forward to seeing you in the Grace Hall basement training room!

Bio Conversion Update

Although it seems like a slow process, much biographical work has been accomplished in the last month. Testing is going well and we are delighted to find that there are not many problems with the conversion scripts. Our Quality Assurance Team has been enhanced with the addition of several new members who were added when we said good-bye to **Patti Lesniewicz** and **Shelly Way**, both of whom have moved on to new positions in Development. Our team now consists of **Sandie Schiele**, **Jo Ann Raatz**, **Fay Fowler**, **Rosalee Hamlin**, **Vicki Trimberger**, and **Joan Varga**, all members of our regular Alumni Files staff. **Angie Fitzpatrick** has given us her spare moments away from stock processing and managing the daily reports. **Mary Deditch** has graciously taken some time away from her Law School Advancement duties to lend us a hand. **Lancie Marvin** of the Sorin team, **Peggy Queen** from Research, and **Lori Rush** in the Phone Center have all been most generous in giving their time as we complete testing in the new system.

Although it may sound like a simple process, checking for the converted attributes from the HP in the Advance system has proven to be challenging for even the most experienced of our team members. As there is no single place in Advance for a straight-forward conversion of our existing HP attributes, team members must first find the attribute on the list of converted attributes and then locate the appropriate screen in Advance. Only then can they check the screen to be sure that the conversion was done properly. We have found the most favorable time for testing is the first hour or so each day before we are bogged down with the normal work load. Testing has also provided these Development team members with the opportunity to explore the new system and familiarize themselves with the many screens and processes that will be used once the system goes live on July 1.

The last of the bio information to be converted has been sent off to BSR this month. Population segments and appeal codes, though normally considered to be aspects of gift tracking, are being handled by the Bio Team because this information was recorded in attributes in our Legacy system. The work of **Jamie Barry**, who is leading the biographical conversion part of the project, and her team has been extraordinary.

Kimberly Umbaugh, our lead application developer, is a core team member with BEAT. Her primary responsibility on the project is technical support with **Mark Houseman**. She, along with **Shelin Mathews**, created the Benefactor Event Activity Tracking (BEAT) application last semester. Kimberly has been solely responsible for several enhancements to the application and is now working with **Dana Bare** on BEAT reporting. Kimberly has been at Notre Dame for seven years. Prior to working at Notre Dame, Kimberly worked in an information systems department for a manufacturing company. Kimberly is a native of South Bend and received her bachelor of science degree from Indiana University.

Outside of work, Kimberly enjoys spending time with family and friends. Some of her hobbies include spending time in nature and dancing. She adds, "I love to walk in the rain." Kimberly says that if she could travel anywhere, she would find a quiet beach in the Hawaiian islands with white sand and beautiful blue waters.

Kimberly has been doing a great job with her devotion to the BEAT application, and her dedication has been appreciated by many. One might wonder if Kimberly would like to dance in the rain to the new BEAT!!!

Biggest asset of Advance: "It gives people features that they do not currently have in HP."

Biggest challenge of Advance: "People changing their procedures to utilize the full capability of Advance."

Favorite Food: Shrimp is her #1 choice, followed by steak on the grill.

Favorite Music: Jazz and classical

Three adjectives to best describe you:

Dependable, caring and analytical

Three adjectives never used to describe you:

Undependable, uncaring, and frivolous

Kimberly Umbaugh
ENTITY IDENTITY

Richard's Training Corner

It's me again. After one week in nearly sunny Florida, I thought I would return energized and ready to teach. Nobody told me that chasing my 16-year-old daughter around Disney would be so exhausting. After three days, I decided I needed to come back to the project so that I could catch my breath. Since we are gearing up for quarterly meetings, let's take a look at two quick items: function keys and a known bug.

FUNCTION KEYS: Many of you use some function keys, and recently I distributed the new (and laminated) keyboard template. For you off-campus folks, I will have your new and more durable version waiting for you in the training session. The most commonly used function keys are probably F9 (Maintenance Mode toggle), F7 (Refresh), and recently F12 (Copy to Clipboard). I wanted to point out a few others that some users are finding very convenient. F6 (New) and F8 (Save) were found to be very useful and easy by the gift processing folks. I also want to point out F4 (Open Clipboard). This is really easy if you can't remember how to access your clipboard, or you want to access it quickly. Lastly, the F11 (Paste from Clipboard) may not seem like something you would use, but if you wanted to paste a name from a clipboard into a field within Advance it is easier to hit F11 than to type in an entity ID.

BUG REPORT: Recently a few users have been getting the dreaded "Unexpected Error" screen in Advance. Both users got this error at the same place, and, with a little research from **Donna Adams**, we found that this is a documented error. The error occurs when a user has an entity note open and then switches into maintenance mode. The workaround offered from BSR is that you remember to switch into maintenance mode prior to going into notes. My recommendation for most of you is that if you know you are going to be making edits, switch into maintenance mode as soon as you login. I will be posting this error in the feedback window so that it can be documented for future users.

A note on the "Unexpected Error" screen – please take the time to type in the field at the bottom of that window what you were doing when the error occurred and then print the error out. Usually you are offered two buttons on that window: "Print" and "Exit Program." Sometimes a third button, "Continue," is offered. If you get a "Continue" button, print the report, then hit "Continue." Again, please take the time to print the error and forward it to me. For the regional offices, please just fax it to me at 631-8325. For those of you on campus, forward it to me via campus mail. This will help us to fix this system and will hopefully make your BSR experience more satisfying. That's all folks!

Thanks!

Richard Kohler

.....Finance Interfaces.....

We have been working with the Finance Team to create multiple interfaces between Advance and the new Banner Finance system (which also has a scheduled live date of 7/1/04). Related to this project are a couple of new terms you may hear: *allocation* is the name for an account in Advance, and *FOAPAL* (Fund Organization Account Program Location Activity) refers to the account in Banner Finance.

We have identified a minimum of three interfaces between the two systems: 1) validate accounts in

Advance against finance and acquire some key pieces of data that we need in Advance, such as department and classification (chair, scholarship, etc.); 2) send journal entries to finance for all new and adjusted gift transactions entered in Advance; and 3) acquire stewardship data (i.e. unit value, total units, book and market values, etc.).

The first two interfaces are scheduled to be in place July 1, 2004, while the third will be scheduled in phase III.

REPORTING UPDATE

We are making progress with reporting! As mentioned in last month's reporting update, we were optimistic that a thorough reporting strategy would result from our January meetings with BSR. And it did! We came out of our meeting with a solid list of reports necessary for phase II implementation. Since the January meeting, the reports have been prioritized and reporting specialists and core team members have been assigned to the tasks of creating functional and technical specifications, programming, and testing for each of the reports. We are planning to have all functional specifications for the required phase II reports completed by the end of March.

The research that core team members and report specialists completed prior to our January meeting provided us with a good foundation for the functional specifications. As a result, some of the functional specifications have been completed, and several others are very close to completion. In addition, a few reports have been coded and are already in the testing stage. For example, eight entity profile reports (for prospect management), including contact reports and notes for the past three and 12 months, are in the Advance test environment. These reports can be used in lieu of the BSR standard entity profile reports, which require an "all contact reports and notes" selection without date range options. We anticipate that these new contact and note reports will be available for use in Advance production by the end of February. These reports will be part of **Richard Kohler's** training program during our upcoming quarterly meetings.

In addition to the entity profile reports, the BEAT reports (Benefactor Event Activity Tracking – football application) are in the programming phase, and a demonstration will take place during the quarterly meeting.

We are happy to report that all gift data has been converted into ADVTEST. There are a few known problems: some account names are still duplicates causing allocations not to display, and some pledges have encountered problems with scheduled payment dates, etc. However, we decided it was important not to delay our checking process any more than necessary and are currently working on quality assurance. This data must be examined by the Q/A team for a few days before turning it over to be tested by the input staff. This will enable any glaring errors to be corrected before we actually begin entering gifts and pledges. **Carol Hennion's** team is anxious to begin this process and to work on data and donors with which they are familiar, as they have been working in a BSR demo database. Transaction types for both gifts and pledges are being reviewed, as well as other table entries that will be needed to make the data more relevant. A quality assurance plan is being developed for both Q/A and data entry and maintenance.

Accounts are referred to as "allocations" in Advance. We are currently reviewing all the allocation data and making decisions on various coding (such as the coding for the CAE Report) so that reporting will be correct. There have been several meetings with the Finance Team (the Accounting Office), and we plan to automatically transfer data for newly entered gifts for cash, stock, credit cards, and ACH gifts from Development to Accounting, once we are both up and running on our new systems. (The Finance Team is also planning to go live on July 1.) Currently, only the depositable cash is transferred, and we must notify Accounting of the total and account numbers for all other gifts types. In addition, all allocation adjustments will be electronically transferred to the General Ledger; at the present time, all of these transactions are manual.

Gift Conversion Update