

# Advance Notice

Volume3 , Number 1

January27, 2005

## *Looks Like We Made It!*

The gift processing, alumni files and acknowledgment teams have all completed their first year-end closing on Advance. How did it go? From November 1<sup>st</sup> through January 19<sup>th</sup>, the gift processing area entered over 39,000 transactions for over \$112,000,000.00 in gifts, matching gifts, pledge payments and new commitments. And of course there were acknowledgments that went right along with that support. Whew! After the dust settles, we'll get **Carol's** comments on the good, the bad and the ugly of the first year-end after Conversion. In the meantime, CONGRATULATIONS to everyone who pulled together to help out at this most busy time of the year.

## Project Update...

Welcome back from the holidays. And, for those of us not in California, Georgia or North Carolina – welcome to 12 months of winter! (I know, it only FEELS like 12 months.) We are quickly zeroing in on some major milestones for the Project – many of which are behind-the-scenes but will have a big impact on Development. Here are some highlights:

- Daily Transaction Report-we have made a correction and two additions to this handy report. You will now see the Institutional Suffix for all donors and the City, in addition to the State, of the donors as well.
- “Flash” Report-this old “standard” is being updated into two new reports: Campaign Fiscal Comparison and Cash Receipts Fiscal Comparison. The final report should be available through Advance by March 1st.
- Trip Prep Report-we hope to get approval on the format for this report soon; then it's off to the programmer!
- Development Activity and Progress Report (better known as the monthly report)- our programmer is currently working with **Bruce** and **Jen** on this report.
- Printing solution-“Print Me” has been installed for almost everyone. This is software that works with Advance to fix that nagging printing speed problem (including printing PDFs!) There have been some speed bumps along the way (no pun intended), but overall this seems to be working very well.
- The Athletic Crediting Module-work is nearing completion on the setup of this new piece for Advance. It will provide a nifty way to see at a glance how people are coded for football tickets (that old DA/DB/DH/etc. system).
- Reporting Instance-”technical-ese” for a copy of Advance used JUST for reporting. This should speed up several steps in the overall reporting process. We have the hardware now and should be able to work with OIT to make this usable for the reporting team soon.

Thanks to everyone who has worked so hard to keep us moving forward for Phase 3!

**Jennielea Vidrich-**  
**Project Lead**



**153 DAYS TO GO**

**Phase 3 Completion**

January 27, 2005.....June 30, 2005

Bruce Danielson  
ENTITY IDENTITY

**Bruce Danielson** arrived back to campus a little over a year ago, not as a student but as a man with a mission. With a formal job title that he prides himself on being 4 characters longer than **Mike Brach's**, Bruce is Director, Regional Development and CORE Team Liaison to Field Marketing Personnel. Euphemistically, his responsibilities are to build strong, personal relationships between the University of Notre Dame and her alumni, parents and friends in an effort to gain financial commitments to further the mission and ideals of the university. Practically, they are to beg for money, according to Bruce!

As a member of the CORE team, Bruce strives to build communication between the field force and the project team. He is an advocate for the effective use of Advance among the field personnel.

Bruce is a 1980 Notre Dame graduate with a degree in business. He was a pole vaulter on the ND track team, (possibly the worst ever, according to him). Prior to coming to work at Notre Dame he worked for IBM and The Summit Group in South Bend and Denver.

Born in Milwaukee and raised in Mukwonago, WI, (population 1,876), Bruce currently lives with his family in Granger. Members of his family include his wife Nancy, who is an SMC 1981 graduate, and his children Katie, Kristin, Bobby, Lauren and Mike. Outside of work, Bruce is involved in detailing **Tim Rippinger's** cars. Some of his hobbies include golf, running, coaching and patenting new Ronco products.

**Biggest Asset of Advance:** "Access to centralized, consistent benefactor data through the entire gifting process."

**Biggest Challenge of Advance:** "Since it was not designed as a sales management system, there is very little interface between field sales processes and the Advance system. It is not necessarily an intuitive system, so my biggest challenge is to get the RD's to use it effectively!"

**Favorite Music:** "Heavy metal, R&B and Barry Manilow."

**Favorite Food:** "Lee's Ribs. I really miss the hangover the day after."

**Favorite Book:** "Anna Karenina is the greatest book ever written."

**Favorite Movie:** "Butch Cassidy and the Sundance Kid the best movie. Bonanza was the all-time greatest TV series."

**Three Adjectives Used to Describe Me:** "Brilliant, insightful and sophisticated. (My mom helped with this one)"

**Three Adjectives Never Used to Describe Me:** "Comment never used: "He writes great Haiku.""

**Who in your life has inspired you:** "Al Roper, Karl Weinke and Elliot Spitzer."

Additional comments from Bruce included the following views. Junior Walker and the All Stars never get enough credit for their complete body of work. e.e.cummings was overrated. Only a day with Nancy beats a day on the golf course! (Is that sweet or what!)

Bruce's work on the project has been greatly appreciated. His involvement has been critical in communications regarding the BSR Advance system between the team and the field staff. Thanks, Bruce, for your dedication!

## Coming Soon--

Sorin Weekend and Florida Fling – what do they have in common? Well, they share a date AND they are the first two events to be managed through the new Events Management module. Thanks to the hard work and planning of people on the Events Team, in the Sorin Society area and in the Alumni Association, things are progressing well for these events. Look for the Events Team update in the next edition of *Advance Notice!*

## Reminder

If you encounter problems while using Advance, please contact the Help Desk at (574) 631-2772. You may also email the Help Desk at [devhelp@nd.edu](mailto:devhelp@nd.edu).

# The Training Corner

There has been a lot of training going on, temps hired for end-of-year, new hires in all areas, add to that all the non-development personnel on campus now needing access to Advance. So things have been pretty busy around here. **Kandy** has been doing stellar work getting training accomplished. Many of you saw my Tech Update memo last week, and you can expect two more in the short term. Expect one soon concerning the Proposal process and a checklist to assist with proposal entry and documentation. Shortly after my return from vacation, yes, I said vacation, you can look for one concerning labels and label extracts and some changes taking place there. Hopefully by now the new printing software has been loaded on your machines and your print times have decreased to a somewhat human level. I will be forwarding a memo shortly on that as well that covers .pdf creation unless someone else takes care of that. Big Congrats to the gift processors for their end-of-year efforts. That's all for now, see you next month.



Thanks!

*Richard Kohler*

## Detailing the New Print Software

New printing software for Citrix is currently being installed on every Development machine that uses Citrix and Advance. **Kyle Sagarsee** is making the rounds to get this installed for all of the on-campus users and **Jeff Roth** has nearly completed the installations for off-campus users. This new software provides faster printing while in Citrix/Advance and fixes some of the stability problems we have had with printers “disappearing” while in Advance. In addition, your printer list will have a much “cleaner” look as there will be printers listed in the printer setup box without the “Client/adnd-xxxxxxx#” prefix. **(Note that the “Client/adnd-xxxxxxx#” printers will continue to show in your Advance printer setup box but should not be selected.)** This new software has been tested and used by several people for the last two months and we are excited about the number of problems it solves. Nonetheless, please report any problems with printing to the Development Help Desk.



## Help Desk to the Rescue

If you called the Help Desk recently, you may have been pleasantly surprised to have **Kyle Sagarsee** answer. He joined Development's Technical team as a Technical Support Consultant/Help Desk Specialist on Monday, January 10<sup>th</sup>. He is a 2003 graduate of Bethel College with a Bachelors Degree in Computer Information Systems. **Rose Michalski**, Help Desk Manager, stated that although Kyle has only recently joined the team, he has made many contributions already. He has a vast amount of computer, networking, and troubleshooting knowledge. Welcome to the Development Department, Kyle!

### FAQ:

Did you know that of the over 70 reports (not including lookups) that are now “live” in Advance, nearly 80% were written specifically for or by Notre Dame?