

Advance Notice

Volume 2, Number 3

March 30, 2004

BEAT GOES LIVE!!!

The Benefactor Event Activity Tracking (BEAT) system is now LIVE! BEAT is a web-based interface designed for both off and on-campus development personnel, enabling them to request football tickets, hotel rooms, pep rally tickets, parking passes, etc. **Richard Kohler** offered training on the BEAT application during the Development Quarterly Meetings in February and gave another demonstration during the March 23 user group call.

The system is designed to consolidate the many different ways that event requests have been tracked in the past. The simple web-based design will allow users to process all requests in one place. This centralized

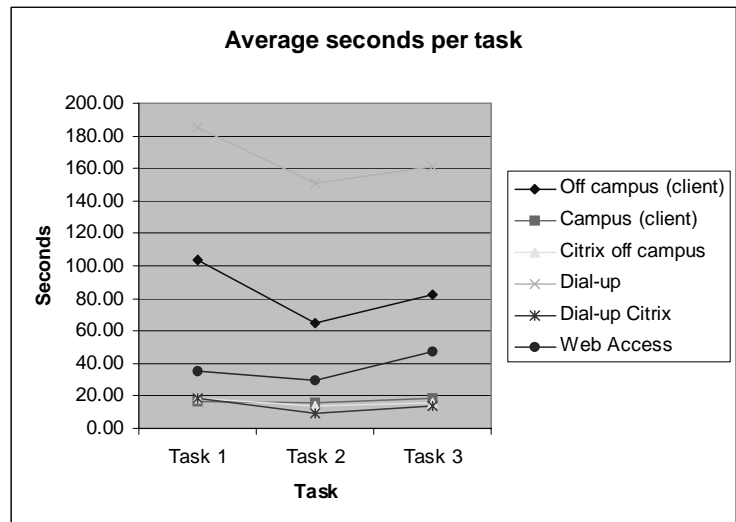
system will also provide a more efficient way to collect the requests for **Tim Rippinger, Kelley Collins, Pam Spence, Lucy Sears** and **Brenda Brownlee**.

As we went live with BEAT, we deployed the BEAT request report, which will be emailed to the appropriate parties responsible for collecting the requests. Future reports will include the following: activity summary report, activity detail report, activity worksheet report and the activity request report. Richard has distributed the Policy and Procedure Manual describing how to use the new system. This is a great reference tool. If you have questions about BEAT, please contact **Richard Kohler** or **Sharyl Dippel**, who will both be happy to assist you.

The Regional Connectivity/Speed Task Force has completed their initial survey of Advance performance on and off campus. Based on their findings, a recommendation to pursue Citrix has been made. Staff within OIT are already hard at work setting up new servers for this product. The final testing is being scheduled for April.

Already utilized by many schools running Advance, Citrix removes much of the processing power required by Advance from your desktop to more powerful and centrally located servers. Although this product is being implemented now for the benefit of off-campus users, it will also greatly enhance the convenience, ease and speed with which we are able to install and run the reports written on campus. These reports include the entity at a glance, prospect management, BEAT and others soon to come.

Our extreme gratitude goes to all those who participated in the testing process, as those findings helped to build the case to pursue Citrix. The test



results are shown in the above graph. This graph illustrates the amount of time it took to perform three common Advance tasks using the Advance client as it is currently installed (on and off campus), Citrix (off campus and through dial-up), the Advance client through a dial-up/modem line, and Advance using Web Access. Stay tuned for a Citrix “rollout” in early May.

Citrix is Coming to an Advance Near You!

REPORTING UPDATE

Last month, we shared that the Core Reporting Team had been assigned to write various functional specifications for the Phase II reports needed for “go live.” Since then, we have worked extremely hard to complete a large number of the functional specifications. The next step is to create the technical specifications. By the end of the month, all functional specs will be finished, and we should have made good progress on the technical specs.

There is progress to share on prospect management reports, too. The entity-at-a-glance (EAG) report has been enhanced and tested and will be deployed very soon. Improvements include the addition of the spouse’s entity ID, cell phone number, and the preferred school/class year of alumni children. Other upgrades consist of displaying warnings, next step, and additional record types. In addition to deploying the EAG report, various entity profile reports have been created and tested. The new entity profile reports include driving directions, strategic notes and giving details for all years as well as for the last five years.

Along with writing specifications and developing reports, the team has been busy with some “behind the scenes” reporting tasks. Reporting Team members meet regularly to share knowledge with each other about Advance, Infomaker, and PL/SQL Developer. The team also discusses and documents standards and procedures used for creating Advance reports in the future.

Senior Processing Specialist **Jamery (Jamie) Barry** has been a member of the Development Department since 1996. Prior to that, she worked on-call for three years. She currently serves as the functional lead for the Bio Conversion of the BSR project.

Known as the *Mominator*, Jamie is the mother of three young men: Tom (28), Brendan (22), and Charlie (19). She and her husband, Tim, have been married for 33 years. Other family members include a 15-year-old mutt named ACE and two cats, Zhang and Zephyr. Over the years, Jamie has been blessed to be the caregiver to snakes, sugar gliders, gerbils, hamsters, birds, fish, geckos, chameleons, a giant lizard that *totally* creeped her out, mice, a huge white rat, Cujo the Rabbit, hermit crabs, a black Lab mix named Deuce, and, of course, pet dust bunnies. No wonder she feels right at home in Development!

Raised on a farm in central Indiana, Jamie now lives in Granger. She is a graduate of Indiana State University with a degree in secondary education/earth science. When asked what she liked to do outside of work, Jamie stated, “Although my entire being is completely immersed in BSR, I still find time to read and do word puzzles.”

Jamie was a Sunday school teacher for over 15 years and has been a school volunteer and librarian, not to mention chauffeur, for many years.

Biggest Asset of Advance: “Advance’s big plus is its infinite capacity to store information. It is very user friendly, and it’s pretty.”

Biggest Challenge of Advance: “Finding an appropriate home in Advance for all the bits of information stored in our Legacy system and then remembering where it all is so we can find it again.”

Favorite Music: “Oldies”

Favorite Food: “Mexican, margaritas, and chocolate – I can be bribed with chocolate!”

Three Adjectives Used to Describe Me: “Quiet, resourceful, pleasant”

Three Adjectives Never Used to Describe Me: “Argumentative, athletic, demanding”

Hobbies: “Reading, cooking, and gardening – as long as it’s not too hot or too cold or too windy or I might get my hands dirty.”

Who in your life has inspired you: “My mother and my grandmother.”

Jamie Barry
ENTITY IDENTITY

Richard's Training Corner

This month's article will be much more serious and professional – not because anyone complained, but just to be different! Now on with the show...This month, I want to talk about research. You're probably asking yourself: what is it? Where do I get it? How do I find it later? Read on to find the answers to those questions.

What is research? Well, *Webster's* defines it as "diligent inquiry or examination in seeking facts or principles; laborious or continued search after truth; as, researches of human wisdom." Sounds pretty cool, right? The word I want to focus on is *laborious*. I have mentioned to some of you that a comprehensive research can take, on average, two to four days. So keep this in mind when planning for a trip or event.

To request research in Advance, just enter a task (as described in the Policy and Procedure Manual), and your research analyst will then retrieve it and work on your request in a timely manner. Now, I really have no clue where they get their information, and, frankly, it doesn't matter. It only matters that the research happens. Our researchers have been directed to do research only for people who have assigned them tasks. If your task is given on short notice, I always recommend following up with a phone call or email. The research analysts try to check their tasks once a day.

To find your research, you have to look in only one place – entity notes. The research report will be attached to a research note. Particulars of the research report may also appear in philanthropic interests/affinities or in wealth and assets. I am sure that down the road reports will be built in the entity profile report area which will extract research notes or a combination of research notes and other wealth and philanthropic information.

I hope this was informative. Once again, if you have any ideas for future training topics, feel free to drop me a quick email with your suggestion.

Thanks!

Richard Kohler

GENERAL PERSON UPDATE

Information held on the HP that is shared with several systems (for example, Development and Human Resources) is considered general person information. After the conversion is complete, we will still share this type of information with other areas on campus.

In order to ensure that data is entered into the various systems consistently throughout the University, the General Person Team created the Data Integrity Standards Manual (DISM). While writing the manual, the team received input from all areas that currently use General Person information on the HP. The DISM is now undergoing review by staff members representing these various departments. Anyone who would like a copy of this masterpiece should contact **Jennielea Vidrich** at 631-5198 or jvidrich@nd.edu.

A big *thank you* to all those in the University Relations division who are participating in this important review process!



RENOVARE HUDDLE: In Preparation for Change

The campus-wide Renovare Team, consisting of 80 people from across the University, held their quarterly Huddle on March 12 at St. Joseph Hall for a day of pep talks, updates, and team building. Members of the BSR Advance Core Team and the BSR Advance Steering Committee were in attendance. The day began with an inspirational speech by University Relations Vice President **Lou Nanni**. Next on the agenda was the “late morning show.” A few of the Renovare teams provided updates on their projects and were asked questions by the host, **Craig Brummell**, Renovare project manager. This added a lighter note to the tasks at hand, which included discussions of several areas going live July 1. Change coordinator **Sheree McCullough** spoke in detail about change and how it affects us.

The morning concluded with an awards presentation. Individuals and teams were recognized for their hard work, creativity and dedication. Our own **Katherine Rosswurm** received the Big “R” (Renovare, not Rosswurm) Award for her outstanding leadership. Congratulations, Katherine, and keep up the good work!

Other highlights included a post-lunch workshop with the Business Improvisations group from Chicago. The main purpose of this activity was to get people to leave their comfort zones and learn to accept ongoing change. The group participated in various improv demonstrations, which were designed to improve the participants’ management skills in dynamic and sometimes chaotic business environments. The intention was to teach participants how to build, foster, promote, manage and improve change management. Providing a hands-on workshop, the group blended lectures, readings and case studies with improv exercises that got everyone involved. Overall, the day was an informative and fun-filled one for the Renovare teams.

64 WORKING DAYS LEFT!!!



Phase II Completion

March 30, 2004.....June 30, 2004

CORE TEAM MEMBERS ATTEND SUNGARD BSR USER GROUP CONFERENCE

Several members of the BSR Project Core Team have “trimmed their sails and set a course for success” by attending the SunGard BSR User Group Conference 2004 in San Diego, California, earlier this month. Activities for the week included training sessions, a general conference, and user group sessions. The conference featured innovative sessions dealing with strategic, managerial and technical tracking. It also included an “Ask the Expert” client clinic and a discussion-driven symposium session. Participants included **Richard Kohler**, **Donna Adams**, **Mike Brach**, and **Scott Siler**. Richard attended training sessions on policies for facilitating gift and crediting, as well as the Advance power user utilities course. He also spent a day with **Sean** and **Dana** in the California regional office.

Donna attended various training sessions, such as the configuration utility for Advance, Smart/Call Advance integration: DataLoader, and the power user utilities course, as well as the conference and user group sessions. Scott attended the events data movement and reporting session and the user group. Mike participated in the conference and user group. The conference’s networking opportunities will prove helpful as we continue our implementation. This is the third year that representatives from Notre Dame have attended the SunGard BSR Conference. The team returned ready to face the many challenges of implementation with a higher level of knowledge and confidence.