

# Advance Notice

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## Drive to Go-Live



As we get closer to go-live, **Mike Brach** and **Katherine Rosswurm**, along with the entire core team, are planning for the extra work which will surround the “cutover” process from the HP DIS

System to BSR Advance. Below are the key dates to remember:

**Saturday, June 12<sup>th</sup>:**      **Convert BIO data**  
**Friday, June 25<sup>th</sup>:**      **Convert GIFT data**  
**Thursday, July 1<sup>st</sup>:**      **Official Go-Live**

In preparation of go-live, Mike communicated to his staff (Annual Fund, Info Services, Data Services, Phone Center and Technology Services) the requirement of helping out in a special way during the three-week period surrounding cutover. In addition to a willingness to assist during the regular business day, overtime hours (much like year-end) will be needed. Both administrators and support staff will be staying until 7:30 p.m. on the following dates:

**June 22, 23, 24**  
**June 28, 29, 30**  
**July 6, 7, 8**

A special thanks in advance for all those who will be pitching in to make sure conversion is a success. For those who will not be actively participating, thanks for your encouragement and support.



## Conversion Update:



### Conversion! Conversion! Conversion!

These have been the first, second and third priorities for the last several weeks according to **Katherine Rosswurm**, Project Lead. Although the initial mapping of gift and biographical data was completed many months ago, we still have much to do before go-live. The biggest issue has been having ample time for testing (also referred to as quality assurance). We want to make sure the data is accurate and that we are using the Advance features in the best possible way for Notre Dame’s current and new processes. We have found and corrected numerous conversion errors and have had to engage in re-mapping of some critical data. We are getting closer each day. A special thanks to **Donna Adams, Mark Houseman, Jamie Barry** and **Carol Hennion** who have been working hard to ensure the data will be delivered with the highest quality possible.

**22 WORKING DAYS LEFT!!!**



**Phase II Completion**

**May 31, 2004.....June 30, 2004**

Associate Director for the Notre Dame Annual Fund and the Sorin Society, **Jennielea Vidrich** has been a member of the Department of Development for the past 13 years. She is currently serving as the BSR Project liaison to the general person team, and overseeing the giving societies benefits management and the acknowledgement process in Advance. Her other responsibilities include overseeing Sorin Society benefits management on the HP, the departmental acknowledgment process, and solicitation and stewardship for the Sorin Society and other areas of the Annual Fund.

Jennielea will take over as BSR Project Lead after **Katherine Rosswurm** assumes her new responsibilities as Senior Director of Development Marketing, Communications & Stewardship. As Project Lead, Jennielea will oversee the delivery of reports and be responsible for the implementation of the Campaign Reporting and Events modules. She will act as Project Lead through the completion of Phase III, which is scheduled for June 30, 2005.

## Jennielea Vidrich

### ENTITY IDENTITY

Her family members include “a great husband,” Daryl, whom she has been married to for 20 years, and two children, Ian age 15 and Annadele age 10. Other family members include two cats, Gizmo and Arrow. Her outside activities include being a “soccer mom.”

Jennielea, a native Hoosier, has lived in the South Bend area since 1984. She is a graduate of Ball State University with a Bachelor’s degree in Physics. (Now that’s rocket science!)

**Biggest Asset of Advance:** “Flexibility.”

**Biggest Challenge of Advance:** “The learning curve that is natural with all change.”

**Favorite Music:** “*Queen*, they are the best group-ever!”

**Favorite Food:** “Anything that doesn’t run. I love Popeye’s Chicken and Mandarin House’s Mongolian Beef.”

**Three Adjectives Used to Describe Me:** “Funny, Organized, Good listener.”

**Three Adjectives Never Used to Describe Me:** “Shy, Timid, Great bowler.”

**Hobbies:** “I love movies and am especially hooked on the “*Lord of the Rings*” trilogy. I love to travel – anywhere!”

**Who in your life has inspired you:** “I have known many people who have overcome amazing odds in their lives. They have all, in their own ways, inspired me.”

Jennielea’s work on the project has been greatly appreciated. Her involvement has been critical in completing the society bolt-on in the BSR Advance system. Thanks Jennielea, for your dedication!

Please note that the next issue of this newsletter will be published in July, 2004. Thank you for your continued support on this project.

# Richard's Training Corner

Once again I find myself writing an article on training, crazy concept, being the trainer and all. Well there are a couple of good things to write about this month. First is the new training website, and the second is Citrix. Two topics that are near and dear to my heart. Ok, so maybe they aren't that near or dear, but they are important and exciting.

It's official, there is finally a training website. It can be found at [www.nd.edu/~advance/training](http://www.nd.edu/~advance/training). It will require users to log in using their AFS Id and password (the same credentials you used to login on the VPN or to get your email). Once in you will find all sorts of things. I have included all the training materials that I hand out in class, just in case you've ever lost, mutilated, or spilled coffee on those little gems I provide. It also has copies of the policy and procedure manuals. In the future, there will also be a section with mini-tutorials on how to do some of the more common tasks in Advance. As time permits I will be creating these for all functions within advance. They are actually little movies that you can watch to see how something is done. Currently there is just one little movie. I am also including past newsletters in case you, my trusted readers, want to refer back to past training or project topics. If you have any problems or suggestions for the website, please feel free to contact me. That data is there as well.

Citrix, my favorite 6-letter word. Many of you have been calling and letting me know what a blessing this was as far as speed. There have also been a few that have called to let me know about the sub-par performance of the printing situation. We are working on that. We got the Word Perfect issue and attachment thingee resolved. Yes, I just went all techie on you with 'thingee.' We are also working on the Adobe printing speed issue. So please be patient with us. Understand that many people are working on a lot of things right now trying to get us live with Bio and Gift and the printing issues are just not the highest priority at the moment. If you were unable to print at all it would be a major priority. We have about 40 days as I am writing this, until we are live, but this is going to be great.

Thanks!

Th-th-th-th-that's all folks.

*Richard Kohler*

## BSR Visits Campus

**Deb Cunningham**, Senior Applications Consultant for SunGard BSR, was on campus May 17-19 to assist the core team in preparations for go-live. Deb worked closely with **Donna Adams**, **Carol Hennion**, **Jamie Barry** and **Richard Kohler** on gift and bio conversion as well as policy and procedure for both. Deb and **Katherine Rosswurm** gave a presentation on the progress and risks of the project, as well as a demo of Advance, to the steering committee on Tuesday the 18<sup>th</sup>. Before returning to home to Connecticut, Deb spent some quality time with the gift processors and alumni files staff to address some of their concerns and continue the training process. Deb also completed some critical report specifications with the team.

# REPORTING UPDATE:

As we move into the “home stretch” in the drive-to-go-live with Phase II, reporting has taken a central role in our efforts. Much of the Core Team, as well as others within the department and at BSR, are involved in this process. Many thanks to those who have given their time and their expertise to this important cause.

We are currently working closely with BSR and our in-house report-writing team (**Dana, Diana, Kate and Sheila**) to put together the reports that are critical to go-live. These reports include replacements for the Daily Gift Register and the PRT, plus specific reports needed by Gift Processing and those who work with the acknowledgment processes (such as Stewardship, the Lettershop and the Giving Societies), among others.

In addition, the Report Writing Team, along with other Core Team members, will be receiving further training in “Advanced Lookups.” As those who currently use the Advance system know, Lookups are used when identifying a person, company or group. The Lookups most often used are known as simple Lookups (trying to find a person by last and first name, for instance). “Advanced Lookups” are a more powerful tool which the report writers will be able to utilize. We have made arrangements with BSR to have specific “Advanced Lookups” designed to replace many of our daily audit reports used in the Gift Processing area and for some giving society reporting, for example. There will be more about this important Advance tool in the future.

As many of you who are assisting with testing already know, there are several BEAT reports that are close to being deployed. We’ll keep you posted.

In other “reporting” news, in the near future you will be seeing a new item on the Advance screen. Soon, nearly every entity will have an “Institutional Suffix” associated with their record. In “English,” this

means that when you do a Lookup to find all of the John Smiths on the system, in the result list you will be able to see information such as affiliations (are they Trustees, St. Thomas More, etc.) and class year. This should help you narrow down your selection much earlier in the process. (The exceptions? Those people who have the message “Do Not Release Info” will not display the institutional suffix.)

Again, thank you for your patience and your help as we all work to learn how to gather information and report on it effectively within Advance!



## Announcements

### Congratulations....

**Donna Adams** was recognized at a dinner on May 17th for 25 years of service to Notre Dame. The event was hosted by the President. Please join us in congratulating Donna for her dedication.

### Thanks...

A special thanks to **William Crittendon** for his years of service in the Department of Development. He has resigned from his position as director of development data services to pursue other professional opportunities. We wish you the very best, William.

### From a Distance.....

As of July 6<sup>th</sup>, **Sharyl Dippel** will be leaving South Bend and joining her family in Asheville, North Carolina, where her husband has been transferred. The good news is that Sharyl will continue to serve as the project’s administrative assistant remotely. We are so fortunate to keep Sharyl as a member of the Notre Dame family.

*Advance Notice* articles are written by BSR Project Core Team members. Sharyl Dippel serves as *Advance Notice* editor.