

# Advance Notice

Volume2 , Number 10

November 29, 2004

## *EVENTS Now LIVE!!!*

Have you heard? The Events Management module is live as of November 3<sup>rd</sup>! The first major events that will be managed through the module are the Alumni Association's Florida Fling and the Annual Fund's Sorin Society Weekend. They both take place the last weekend of February, 2005 (though Florida Fling will probably be warmer!)

If you are interested in attending training on the Events Management module, please contact **Richard Kohler** or **Kandy Van Horne**. They will be putting together a training schedule for the spring.

Many thanks to the team. They put in a lot of work, especially during the big push the last couple of days before go-live. The Events Team members are: **Scott Siler** (Events Project Lead), **Jennielea Vidrich** (Phase 3 Project Lead), **Donna Adams**, **Michele Graddy**, **Colleen Hawkins**, **Richard Kohler**, **Kathy Lentych**, **Janet Mead**, **Lucia Merker**, **Therese Post**, **Teri Vitale** as well as **Mark Houseman** from OIT. Please feel free to ask anyone on the team questions about Events Management!

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## *Focus on Reporting*

Since the last issue of *Advance Notice* several reports have been moved into production and are available for different user groups, including three Campaign reports which have been made available for the entire staff. In addition, progress is being made on several fronts, with Leadership and National Programs reporting needs currently being addressed. The reporting staff is also doing a great job of keeping up with "ad hoc" reporting requests.

If you need a report that you cannot find within Advance, please submit your request by email to **Jen Vidrich** at [jvidrich@nd.edu](mailto:jvidrich@nd.edu). Should you need a copy of the new Report Request Form, please let Jen know. (This new form contains a "Statement of Responsible Use" that ALL report requestors are required to complete and have on file with the Development Information Services office.)

After your request is sent to Jen, the reporting team will determine whether it is an "ad hoc" report (such as a request for a mailing name and address list

for a solicitation) or if it should be viewed as a reporting process which will result in a standard report that either the report writers or users may run routinely from Advance.

For "ad hoc" reports we ask for a minimum of two weeks to complete the request. This will generally take into account the "production calendar" of the reporting group, staff vacation times, etc. If the report turns out to be something that should become a standard report, then much more work will be involved and may include Development reporting staff as well as off-campus programmers. Because of the steps involved in this process, we ask for a minimum of one month lead time with these requests.

We understand that it is not always possible to give the team this much notice on reporting requests; every situation is unique. Thanks for providing as much lead time as possible, and for working with the report specialists to answer their questions during the process.

## Bob Schaffner ENTITY IDENTITY

As reported in the October issue of *Advance Notice*, **Bob Schaffner**, Director of Enterprise Systems with OIT, has joined the Development BSR Project Steering Committee, taking over for **Carolyn Berzai** who is now the project lead for the HR/Payroll Renovare team. Bob's responsibilities with the BSR

Project include serving on this committee and managing the OIT staff supporting Advance. As Director of Enterprise Systems he provides leadership and direction for the OIT Directorate responsible for software development, database management, packaged software implementation and integration, and ongoing maintenance/support for systems that support the University enterprise. Previously, Bob served as Director of Operations and Engineering with OIT. He is a Purdue University alumnus with a Bachelor of Science degree majoring in Computer Technology. He graduated with distinction from his alma mater and received the Wallstreet Journal award for scholastic achievement.

Born and raised in LaPorte, Indiana, Bob and his wife Carolyn "Sue" live in the Covington Shores subdivision in Granger with their third miniature schnauzer Chloe. Outside of work, Bob keeps busy with homeowner chores, attempts to keep physically fit, participates in the "pushin and over 50's" group at church, and just enjoys life. He has been fortunate to travel to many beautiful places, and commented that Disney World is his "favorite destination."

Few people know that Bob played semi-professional football prior to entering college (thus he was unable to join the Boilermakers on the gridiron). He was also a stock car driver (Class A) and came within .11 second of the national record for his class. THAT explains his fascination with cars - and perhaps his presence on the "Steering" Committee!

**Biggest asset of Advance:** "Its match of the functional requirements that were identified to support the new Development program."

**Biggest challenge of Advance:** "At this phase of the project, the biggest challenges going forward seem to be related to creating the necessary reporting."

**Favorite Food:** "Italian."

**Favorite Music:** "Oldies."

**Hobbies:** "Training with weights, cars (attends various shows), travel, logic games."

**Three adjectives to best describe you:** Methodical, Organized, Predictable

**Three adjectives never used to describe you:** Verbose, Irrational, Liberal

Thanks for your work in support of the Development BSR Project, Bob!

## 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).

## FAQ:

Did you know that there are three custom-designed Notre Dame Label/Extract formats in Advance? Look under File/Print Other/Other Reports for ND Ext #1, #2 and #3!

# Richard's Training Corner

Howdy and Hello, in this month's article I am going to talk about Proposals. During the quarterlies I had a discussion with the AA's about making sure that their proposals were documented within Advance. For details about how to physically create the proposal refer to the Policy and Procedure Manual. As the campaign ramps up, this becomes even more important - important from the perspective of the campaign planners and also to help you manage your solicitation strategies.

The proposal window is used to document all solicitation activities, from the early stages of planning through the negotiation process, and on to funding. As you clean up your prospect lists, it is important to remember to project your future solicitations. For development officers, take a look at your prospect list and I would bet that you will be able to come up with a few. Not only can you document your current activities, you can document those being 'Targeted or Planned.' Be aware that the Start Date on the proposal reflects the status of the proposal. So if you have a proposal that is targeted or planned for the spring, the Start Date should reflect the date you plan on **making the ask**. Similarly, if the proposal is approved by the donor, the Start Date should reflect the date they approved it. (Does that all make sense?) In the rare case - yes, sarcasm - that a donor declines the request, the Stop Date is used to document that date.

If you have any questions, concerns, or seek clarification please don't hesitate to call my cell 574-261-3636. Remember though, if it is a problem with your computer or Advance, please call the help desk at 574-631-BSR2 (2772).

Thanks!

*Richard Kohler*

## Making Progress on Infrastructure

**Mark Houseman** is currently working with other members of the OIT staff to move forward on the creation of a "reporting instance" for Advance. In "English" that means that we will have a database that looks just like our production database that will be used exclusively for reporting. Therefore, many of the reports that users (and report specialists) run will do their work in this new database - and shouldn't slow down people working in the production database. Users should then see a decrease in those times when system response slows down due to folks running reports (like pledge reminders). Mark will keep us posted on their progress!

213 DAYS TO GO



Phase 3 Completion

November 30, 2004.....June 30, 2005



**HAPPY  
THANKSGIVING**

# In the “Spirit” of Campaign Reporting

For Phase 3 of the BSR Project, **Carol Hennion**'s primary responsibility is the implementation of the Campaign Reporting Module. Working with several people in the Donor Services area, **Donna Adams** and **Karen Cretekos** from BSR, Carol has lead the effort to configure the module, incorporating CASE standards and the new “Spirit” campaign priorities. Reporting for the campaign is the team’s next big challenge. Carol is working closely with **Dan Reagan** on future campaign reporting needs.

The good news is that there are currently three Campaign Reports that use the tables from the module. They are: ND Campaign Detail by Donor; ND Campaign Detail by Gift; ND Gift Pyramid. All of these can be found in the Reports/Reports Menu and should be available to most Advance users. Carol is putting together descriptions of each report which will be made available for users very soon. In the meantime, should you have any questions about the reports, or the Campaign Module itself, please contact Carol.

## Coming Attractions: DIS Website

Keep your eyes open for the soon-to-be-released Development Information Services website. We hope to launch this site sometime in December. From this site you will be able to access the Advance Training website and the new reports delivery system.

# In Thanksgiving

As we move into the holiday season, I would like to take this opportunity to say thank you to everyone in University Relations and on the Renovare project on behalf of the BSR Project Core Team. We are truly grateful for your support as we have moved from Phase II of the project to Phase 3. Just as you all pulled together to support the project during conversion, you have also supported us as we move to make the implementation of the BSR/Advance system a success moving forward.

In addition, I would like to thank everyone for their support of our various team members as we have gone through some difficult times this past year. As always, our Notre Dame family has come together for us in times of need, offering helping hands and broad shoulders when they were needed most. Thank you for your kind words and thoughtful deeds.

-Jen Vidrich

