

# Advance Notice

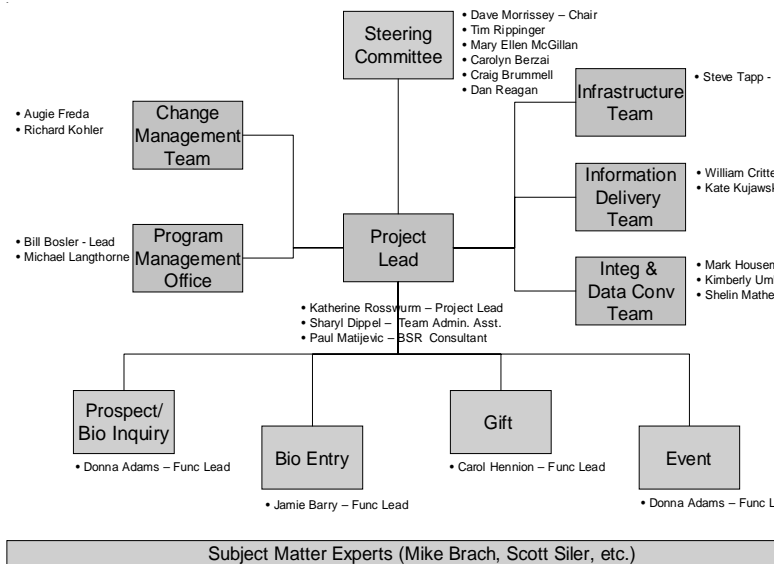
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## New Project Structure

The graphic at right illustrates the revised project structure for the Development BSR Advance Project. Many individuals have been asked to take on leadership roles as the project moves forward. **Dave Morrissey** has taken on the role of project sponsor, and **Katherine Rosswurm** is now serving as the project lead. **Paul Matijevic** remains our BSR consultant. **Donna Adams** remains our functional lead for Phase I; **Carol Hennion** will serve as functional lead for Gift; and **Jamie Barry** will serve as functional lead for Phase II Bio. **Mark Houseman** remains our technical lead for all phases and has the strong support of **Shelin Matthews** and **Kimberly Umbaugh**. In addition, **Bill Bosler** is assisting the team with his project management expertise.

We are counting on **William Crittendon** to lead the way with reports and on **Kate Kujawski** to provide personalized templates from Advance for our end-users. **Augie Freda** will continue in his role in the



prospect management change process and will also continue to assist with policy and procedures. **Richard Kohler** will continue his excellent training sessions, and **Sharyl Dippel** is assisting the team in numerous ways. Please know that you can count on the core team for assistance. On page three of this newsletter, you will find the names, email addresses and phone numbers of all the core team and steering committee members.

## KGR Advances to BSR

**Katherine G. Rosswurm**, the development project lead, and **David M. Morrissey**, the new sponsor for the BSR Advance project, are busy in their new roles. Katherine is responsible for overseeing and leading the BSR team to ensure a timely and successful conversion. Her administration and communication skills will assist the project in many ways. Similar to the role **Craig Brummell** plays in Renovare, Katherine's appointment allows other team members to stay focused on the technical aspects of the project. Throughout the University, departments are realigning staff in order to allow personnel to temporarily leave their positions so that they can assist with their department's Renovare conversion.

Katherine's education and experience make her an obvious fit for this new challenge. A graduate of

Saint Mary's College, she brings with her ten years of work in higher education. She began her career at Saint Mary's in Admissions and Residential Life/Housing. At Notre Dame, she has spent five-and-a-half years in Development, as assistant director, associate director, and, presently, director of stewardship programs. In 2000, Katherine received her Master of Science in Administration degree from Notre Dame. Similar to an MBA, the MSA program in the Mendoza College of Business is geared toward the non-profit sector.

"While it is hard to temporarily leave Stewardship, this project is important to the future success of Development. I look forward to learning from and working with my colleagues involved in this vital project," Katherine remarked.

## ADVANCE Training

Presently, 82 people have had Advance and VPN (Virtual Private Network) installed on their desktops. VPN will run while we are in Advance to keep the information secure. Eighty-nine members of the Development staff have had Advance navigational and/or functional training. **Richard Kohler**, training and help



desk specialist, has been conducting the sessions since April. The navigational session lasts three hours and teaches the user how to get

around the system. According to Richard, the purpose of the first session is “to get people comfortable with the system and not to be intimidated by the large number of windows. The sessions are structured to generate confidence and excitement about the new system.” The functional training session is six hours long and focuses on policy, procedures, and the “how and why” of the prospect management system. It builds on the skills mastered in the navigational course.

Richard continues to conduct both sessions as each area goes live. Staff from the off-campus regional offices have been coming to campus to complete Advance training before their ACT databases are converted.

In addition to the present courses, Richard plans to offer classes in Advance reporting, clipboards, mail merges and general letter creation. Richard will be trained by BSR on Robo Help, so he can create our own online help system. Future plans include a website using Viewlet Builder; this will enable Richard to create help files such as movies, which can then be watched to learn about an application. Hopefully, there will be a hyperlink within Advance to launch the “help” movies.

**Carol Hennion, Jamie Barry** and Richard have begun working on policy and procedures for the bio-system. Richard will then create a training module as he did for the prospect management courses, throughout the conversion (and beyond!).

Out of the “wild blue yonder” and into Development, **Richard Kohler**, training and help desk specialist, joined us after 20 years with the U.S. Air Force as an intelligence agent and bodyguard. “To describe what this really means,” Richard says, “requires a delicate touch. In its simplest form, my job was to take things apart, learn how they work, and figure out ways to kill or destroy them. That ‘thing’ could be a country, a certain tactic or strategy, or the latest piece of military hardware.”

Richard began his armed forces career upon graduation from Mishawaka High School in 1981. His tour of service took him all over the globe. His favorite spot was Misawa, Japan, because “it was a small and safe town. It reminded me of Mishawaka, and the people were wonderful.”

He received his associate degree from the Community College of the Air Force and his B.S. from the University of Phoenix. Richard’s new position at Notre Dame allows him to be closer to his family in the Michiana area. Richard’s family also includes Jessica, his 15-year-old daughter.

**Biggest Asset of Advance:** “The ease with which we can retrieve data. We can pull our own reports/data from our desktops.”

**Biggest Challenge of Advance:** “Managing a training project of this size. With Advance, I am teaching, in some cases, a new way of doing business as well as a new software system.”

**Favorite Music:** “Modern/contemporary jazz”

**Favorite Food:** “Ah, come on, look at my belly! But seafood would be my favorite.”

**Three Adjectives Used to Describe Me:** “Tenacious, humorous and decisive”

**Three Adjectives Never Used to Describe Me:** “Wishy-washy, boring and pessimistic”

**Hobbies:** “Hockey, mountain biking, bike racing, cooking and all activities that involve being in the water.”

Richard concludes, “I read a quote from Albert Einstein that goes, ‘Great spirits have always encountered violent opposition from mediocre minds.’ It has stuck with me ever since.”

## ENTITY IDENTITY

# A Who's Who in Project BSR Advance

## PROJECT CORE TEAM

<b>Donna Adams</b> Donna.J.Adams.8@nd.edu 1-3019	<b>Mark Houseman</b> Mark.A.Houseman.2@nd.edu 1-3931
<b>Jamie Barry</b> Jamery.S.Barry.16@nd.edu 1-5150	<b>Richard Kohler</b> Richard.C.Kohler.5@nd.edu 1-0993
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<b>Carol Hennion</b> Carol.J.Hennion.1@nd.edu 1-5546	

## STEERING COMMITTEE

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<b>Katherine Rosswurm</b> Rosswurm.4@nd.edu 1-9785/2859

## The Solutions Corner

As we move toward getting everyone live on Advance, many questions and concerns have come up. New resources have been established to help address these issues. One such resource is the “feedback” button in Advance – you just click on the button, fill in a few blanks, and save. Everyone can visit the feedback area to view other’s comments and posted answers. Another method is the listserv, which has been set up for various areas and will allow users to view solutions and updates. Questions can also be emailed to [Advance@nd.edu](mailto:Advance@nd.edu), where they will be directed to the proper resource person. Finally, a monthly Advance user conference call will allow for active discussion with other users. With these resources, we hope that Advance users will find and share solutions in an expedient manner.

### Go Dates!!!

*The following individuals and offices have now converted to Advance.*

*June 30: John Hannan and Kathy Webb*

*August 27: Bill Doyle, Chris Bonwit, and the Atlanta Regional Office*

*August 29: Planned Giving*

*September 3: Law School Advancement*

*September 5: Pat Krueger*

*September 17: Tim Rippinger*

**HOT TIP: Although no major problems exist while using either *Word* OR *Wordperfect* with Advance, *Word* is more compatible with the new system.**

## A Little R&R

Let's have a little R&R (Review of Renovare). The Renovare project is one of the most significant and far-reaching projects the University has undertaken. It will impact staff, faculty, students and alumni for the next 20 years by replacing the present HP system, which currently supports four core systems:

- Student/Faculty Information System (e.g., admissions, class lists, financial aid, student accounts)
- Financial System (e.g., general ledger, accounting services for restricted and unrestricted accounts)
- Human Resources/Payroll System (e.g., faculty and staff appointments, payroll, benefits administration, position control)
- Development Information System (e.g. alumni relations, fundraising, planned giving)

In addition to these core systems, which are critical to the University's daily operations, there are a number of "ancillary" systems operating on the mainframe, including Student Housing, Laundry, Security Dispatch and Student Health Services.

In March, the University announced SCT Corporation of Malvern, Pennsylvania, as the vendor and the SCT's Banner as the software solution for the new system. **Craig Brummell** was named program manager of the Renovare project in November. A member of the O.I.T. staff and a Notre Dame alumnus, he is overseeing implementation of the integrated systems. He managed similar projects as a consultant for Arthur Anderson Business Consulting and project leader at GE Medical Systems. Reporting to **Gordon Wishon**, chief information officer, Craig is accountable to the Project Renovare Steering Committee for the overall success of this complex project.

Using a collaborative effort, the following conversion timeline has been established: Development in June 2004; Financial Systems in July 2004; Student/Faculty Information Systems in July 2005; and HR/Payroll Systems in December 2005. According to Craig, "this is a somewhat aggressive but doable timeline."

### \*\*\*NEWSFLASH\*\*\*

Due to Libby Schleiffarth's added Stewardship responsibilities, *Advance Notice* will now be produced by Katherine Rosswurm, Sharyl Dippel (BSR administrative assistant), and Jen Hengehold (Stewardship writer/editor).

MANY THANKS TO LIBBY for three great issues!



## Renovare Kick Off

A campus-wide kick off was held June 4-5, bringing together officers, staff, faculty

and project participants from all departments. An exclusive panel of University officers and leaders explained the vision and importance of Renovare and fielded questions. **Debbie Brown**, head volleyball coach, **Bobby Clark**, head men's soccer coach, **Kevin Corrigan**, head lacrosse coach, and **Dave Poulin**, head hockey coach, discussed team building and the chemistry of successful teams. The two-day function was held in the Press Box and at Debartolo Hall. The original Development BSR Advance core team was in attendance. In addition, **Shannon Cullinan** represented **Lou Nanni**, who is a member of the Renovare Steering Committee and was traveling for the University at the time.

The next quarterly meeting – the Renovare "Huddle" – is scheduled for September 25.

## Terms of Endearment

**Windows:** Advance uses windows to enable the user to interact with the data. Each window is associated with a specific collection of data. **Blue** is the biographical data; **Magenta** is the prospect data; and **Green** is the gift data.

**Panes:** Within an Advance window are one or more panes that provide subgrouping of data within the windows.

**Drill Down:** Term used when opening a window to get to its panes. For example, with the biographical window open, you can "drill down" by clicking on the down arrow in that window, which will take you to a pane; this pane may take you to biographical details and additional windows within the biographical data that may include employment and relationship information.

**Attribute:** Logical grouping of data elements about the entity. Attributes are associated with the subsystems and accessed through those subsystems. Examples of attributes include: interests (bio), contact reports (prospect), memberships (bio), and wealth and assets (prospect).