

# Advance Notice

Volume2 , Number 8

September 30, 2004

## *Familiar Faces in Grace Hall*

You may have noticed some familiar faces as you wander the corridors of Grace Hall. Throughout September members of the Core Team and Reporting Team have moved from their temporary offices in the ITC building back to permanent offices in Grace. Just to make the adventure even more fun, however, they have moved “back” to new locations in Grace!

As **Mike Brach** mentioned in his earlier memo, **Dana Bare, Kate Kujawski, Sheila McMahan, Diana Seward, Donna Adams, Jen Vidrich** and Mike have all relocated to offices on the third floor, next door to the Development Phone Center. **Lancie Marvin**, Mike’s Administrative Assistant has moved as well. This move coincides with the move to third floor south of the Donor Services area, which includes Core Team members **Carol Hennion** and **Jamie Barry**. **Richard Kohler** has also relocated to three-south. And finally, **Katherine Rosswurm** has moved in “next door” to **Mary Ellen McGillan** on eleven south.

Soon **Scott Siler** of the Alumni Association will also have a spot in Grace. He will be working from Jen’s former office in the Sorin Society area a couple of days each week as we move to implement the Events Management module with Advance.

Our remaining Core Team members - **Kimberly Umbaugh, Mark Houseman** and **Bill Bosler** - will retain their offices at ITC but can be seen at Grace from time to time as they attend meetings and work with development staff on a number of issues relating to Advance.

## *September Users’ Group Net Meeting*

– It’s all about reporting!

On September 27<sup>th</sup> another Advance Users Group Net Meeting was held. The focus of this month’s meeting was reports – what is available for the end-user to run for themselves, and where do you find these little beasts?

**Jen Vidrich** gave an overview of the basic reports that are available through both the “Reports/Reports” menu and the “File/Print Other” menu. Some of these include old favorites like the Donor Profile/PRT report and the Entity Profile reports. Other reports and utilities which were reviewed included the Fiscal Comparison Report (FCR) and the Clipboard List Management utility from the “Reports/Reports” menu, as well as the “ND File Extracts” from the “File/Print Other/Other Reports” menu. These extracts replace the vendor, general and “grid” download functions from the HP.

**Richard** will soon be posting the complete list of end-user-driven reports on the Advance Training website. As a reminder, the secure website address is <http://www.nd.edu/~advance/training/>. For assistance with running these reports, please contact Richard Kohler, Jen Vidrich or the ever-popular Help Desk!

**274 DAYS TO GO**



**Phase 3 Completion**

September 30, 2004.....June 30, 2005

### FAQ:

“Did you know that you can review what Development Department benefits, such as “Articles of Interest” are assigned to your donors through the Benefits Tracking Module? Use ‘Go To BENE!’”

## Scott Siler ENTITY IDENTITY

Who is that mysterious guy, from the Alumni office who has been on the CORE team for the past two years? If you guessed **Scott Siler**, you are correct. With the nickname of Scotty, one might wonder if he can beam anyone up. He is the Director of Alumni Information Technologies. He and his staff are responsible for all of the support of all the technology and online services used by the Alumni Association. This includes support for the staff as well as all alumni groups and individual alumni. Responsibilities on the BSR project include serving on the Core Team for the last two years as a rep from the Alumni Association, and as the chair of the Events Working Group.

He received a BS in Math from Notre Dame in 1982 and a MA in Math Education from Ball State in 1988. Prior to working for ND, Scott taught high school math and coached baseball, tennis and football for a total of eight years at Wawasee and Goshen high schools. He has been employed at ND for fourteen years and in the Alumni Association for four and one half years. Scott grew up in Elkhart and currently resides with his family in Granger. As he stated, "I am married to my best friend, Carla, and have 4 kids." Angela is 17 and was accepted at Interlochen for vocal instruction. Justin, age 15, is a co-captain for the St. Joe JV soccer team. Becca is 8 and loves to play sports and dance. Matthew has just learned how to walk and is 1.

Outside interests include being very active in his church, River Valley Community Church. He umpires high school baseball and referees high school football. Besides officiating, Scott enjoys going to sporting events and dance performances that his children are involved in. He likes to golf, but can't seem to find time to play more than a couple of times a year anymore. He also enjoys cheering for the Irish football and baseball teams as well as the Green Bay Packers.

**Biggest Asset of Advance:** "The ease of using the system."

**Biggest Challenge of Advance:** "How slow it is currently."

**Favorite Music:** "I listen mostly to Christian music and soft rock."

**Favorite Food:** "If I have to pick just one—Chocolate cake."

**Three Adjectives Used to Describe Me:** "Christian, trustworthy, consistent."

**Three Adjectives Never Used to Describe Me:** "Impulsive, lazy, tall."

**Who in your life has inspired you:** "My biggest inspiration comes from my personal savior, Jesus Christ."

Scott commented on how he loves working at ND and is glad to have had the opportunity to contribute a small part to a project that has such a huge impact on the university. Thank you Scott for all of the many contributions you have made to the project. It is very much appreciated.



## Announcements:

### Welcome to the BSR/Advance Core Team

We would like to take a moment to welcome **Bruce Danielson** to the BSR/Advance Core Team. Bruce will be representing the fundraising field staff, particularly in the area of Leadership giving. He is a Director of Regional Development for Super Region Three – the Great Plains and Western states.

We appreciate Bruce's commitment to Phase 3 of the project and to the successful transition following conversion. Welcome aboard!

# Richard's Training Corner

September brought an end to the BIO and GIFT training blitz. However, that doesn't mean that the trainer (or trainees) get to take a breather. Hot on the trail of the blitz has come training for new members of the staff, so Richard has been busy training in Advance, Eudora and Corporate Time. Does the man EVER sleep? (Don't think so!)

Richard is in the process of setting up a regular training schedule for newcomers and for continuing education of current staff as new modules, reports and features come on-line. So, keep your eyes open for "News from the Trainer."

## News on Infrastructure

In an effort to increase the efficiency of Advance, especially when running reports, **Mark Houseman** is working feverishly with fellow IT gurus. In the not-too-distant future we hope to have in place a reporting instance of Advance (this would be a mirror of what the production environment of Advance looks like). The reporting instance would then be the place where the system actually grinds through the work that is done during reporting. As you can imagine, setting up this instance involves an act of congress, some whining and crying - and a lot of work on the part of **Mark, Donna, Nagi Elia**, and others in OIT. In addition, they are working on integration points with other Renovare projects like finance, student/faculty, and human resources, as well as integration points within Development's three Sungard BSR products - Smartcall, Advance, and Events Management. So, stay tuned!

### FAQ:

Remember that transaction lookups are based on LEGAL credit if you use the "amount" field. If you use the "credit amount" field, that is "soft credit."

Legal credit is the total of each gift for which the primary donor may receive a charitable gift tax deduction.

Soft credit always equals hard (or legal) credit, but may be split among several entities.

### Help Desk Reminder



Please remember to phone or email the Help Desk when you encounter errors or problems while working in Advance

or logging on through Citrix. This will allow the staff to build a library of solutions which will help us address problems more efficiently as time goes by. The Help Desk phone number is (574) 631-2772. The email address is [devhelp@nd.edu](mailto:devhelp@nd.edu).

# Sungard BSR Mid-Year Conference and Training

As many of you know, in the springtime Sungard BSR hosts a large users' group conference and training sessions which members of our team have attended for the past few years. Each fall Sungard BSR also hosts a smaller users' conference called the "Mid-year." The most recent Mid-Year was in Boston, Massachusetts on September 10-15.

The development office had three participants in these meetings and training sessions: **Dana Bare, Diana Seward and Jen Vidrich.** All

three attended training of one sort or another. Dana attended advanced SQL training, Diana learned about data loading, and Jen got a smattering of training that covered overviews of security settings, programming language for non-programmers, and the highlights of the latest version of Advance. In addition she stayed for the conference itself, getting some valuable information to bring back to the team.

Welcome back to our three weary travelers, who each made it home safely after mostly uneventful flights – just don't ask Jen about Detroit!



## LUCKILY, WITH PADDLE

You know how that one song goes: "back home in Indiana, that's where I want to be." Well believe me, during the past few weeks down here in hurricane haven, I was singing that song a time or two. The devastation is indescribable. So many homes were destroyed and lives changed forever. Luckily for our family, we had minimal damage. Collections are continuing to be taken for food, supplies, clothing and other items. I used to think that when the St. Joe River rose along the YMCA that was something. Down here, rivers were raging and roads were washed away. We are thankful to God for our safety.

Other than that, I have been managing to keep busy on the BSR project by continuing to be involved in clean up, testing, record tracking, making travel arrangements, the newsletter and other special projects. The one thing that I do have to admit that I miss is seeing everyone. I sometimes just imagine the facial expression on peoples' faces while listening in on meetings. Believe me some of you have facial expressions that, well just thinking about it now brings a smile to my face.

So if any of you were wondering how I am doing and what I am doing, that sums it up. Drop me a line once in a while. I'd love to hear from you all!

**SHARYL DIPPEL**



## Public Clipboards

This is a follow up to the email that was sent by **Donna Adams** a few weeks ago concerning the number of public clipboards that are in Advance. A process has now been implemented to change any public clipboard to be private. The process will mark any clipboard private that has not been modified for the past two weeks. This process will run on the weekend. If people email Donna about clipboards they know need to remain public for a longer period of time, she will exclude these from the process. Please let Donna know if you have any concerns about this.