

# The New Collegiate University Development Database - Implementation Issues

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# Synopsis

Supporting Development and Alumni Relations the new system is aimed at all members of the Collegiate University. To this end there are many challenges and issues of concern. This workshop will look at some of the key technologies and issues surrounding implementing the Blackbaud Enterprise CRM at the University of Oxford and what it means for users and stakeholders. Of particular note will be the system architecture, connectivity and data migration.

# Topics

1. What is DARS
2. Project Objectives
3. A quick look (screenshots)
4. The technology stack
5. Deployment and connectivity
6. Current project status
7. Any questions

# What is DARS

- Development and Alumni Relations System
- Contact/Constituent Relationship Management
- One repository of data
- Open areas and secure control
- Process focused

# Strategic Aims

- Supports the Campaign for the University of Oxford
- Sharing and collaboration between Development and Alumni Professionals
- Support common process and best practice
- Offers economies of scale

# Benefits

- More effective operational processes
- Increased staff productivity
- Reduced working cycle times
- Improved decision making
- Better working relations
- Improved customer service
- Reduced average system operating charges

# Project Objectives

- Work with Blackbaud as a partner (a significant internal team)
- Implement core functionality first
- Establish a stable baseline
- Focus on process and data
- Support internal processes and users
- Establish training and support for the future

# User Interface - contacts

The screenshot shows a web browser window titled "Robert C. Hernandez - Blackbaud Enterprise". The browser's address bar shows the URL "http://localhost/bbAppFx-BBEC1.4/ as BBNT\jimB". The browser's menu bar includes "File", "Go", "View", "Tasks", "Favorites", "Tools", and "Help". The browser's toolbar contains various navigation and utility icons.

The main content area displays the contact profile for Robert C. Hernandez. The profile includes a photo of a man with glasses and a beard. The contact information is as follows:

- Address:** 410 17th St, Denver, CO 80202-4402, United States
- Lookup ID:** 96
- Status:** Active
- Primary business:** Davis & Johnson Pharmaceuticals
- Primary education:** Wake Forest University
- Active constituencies:** Board member, Donor, Volunteer, Event registrant, Alumnus
- Spouse:** Wendy Hernandez
- Email addresses:** rhernandez@net.com
- Phone numbers:** 303-997-3301 (Home, Primary), 303-937-2000 (Beeper), 888-387-1211 (Cell Phone), 312-923-1190 (Fax), 520-847-2445 (Vacation Home)

The left sidebar contains several sections:

- Tasks:** Edit lookup ID, Edit link to user, Mark inactive, Mark deceased, Delete Robert C. Hernandez, Write a letter, Search MatchFinder Online, Refresh, Help.
- View as:** Volunteer, Event registrant.
- More information:** Giving, Correspondence, Communication preferences, Relationships, History, Wealth information, Interactions.

The bottom of the browser window shows the Windows taskbar with the Start button, several application icons, and the system tray displaying the time as 11:03 AM.



# Relationship Tree

Robert C. Hernandez - Relationships - Blackbaud Enterprise

File Go View Tasks Favorites Tools Help

Tasks: Refresh, Help

View as: Constituent, Volunteer, Event Registrant

More information: Giving, Correspondence, Communication preferences, History, Wealth information, Interactions

PeopleLink: Update using a strict search, Update using a relaxed search

Robert C. Hernandez - Relationships

410 17th St  
Denver, CO 80202-4402  
303-997-3301  
[hernandez@net.com](mailto:hernandez@net.com)  
<http://www.blackbaud.com>

Lookup ID: 96

Active constituencies: [Board member](#), [Donor](#), [Volunteer](#), [Event registrant](#), Alumnus

Status: **Active**

Spouse: [Wendy Hernandez](#)

Primary business: [Davis & Johnson Pharmaceuticals](#)

Primary education: [Wake Forest University](#)

Relationships Relationship tree PeopleLink

Relationship tree

- Amy Hernandez (Mother)
- Camela Hernandez-Garcia (Daughter)
- Chicago Pediatric Clinic (Former Employer)
- Chicago Rotary Club (Charitable Society)
- Christopher T. Young (Golf Partner)
  - Mary Young (Spouse)
  - Dean Malone (Business Partner)
    - Boston Pediatric Association (<Not Specified>)
    - Stella S. White (Sister)
    - William J. Clinton (Golf Partner)
  - Jason Young (Brother)
  - Margaret Sloan (Mother)
  - Melissa Young (Sister)
  - Young & Reed Physicians (<Not Specified>)
- Davis & Johnson Pharmaceuticals (Employer)
  - Francis R. Heidt Memorial Hospital (Nonprofit Organization)
    - David M. Korbin (Employee)
    - Orla A. McGrann (Employee)
      - Howard McGrann (Husband)
      - Southeast Museum of Art (Employer)
    - Toy World, Inc. (Employer)

Connected to BBInfinity at <http://localhost/bbAppFx-BBEC1.4/> as BBNT\jmb

start | 2 Mic... | 31. Nic... | Micros... | Robert... | 11:06 AM

# Managing Prospect Workflow

Major giving - Plan - Blackbaud Enterprise

File Go View Tasks Favorites Tools Help

Blackbaud Enterprise

**Edit steps for James L. Ballou**

Plan type: Major giving Site: N/A

Steps Add steps from plan outline

Select all Clear all Update status Insert step Edit additional details Delete

Expected date	Objective	Owner	Stage	Status	Actual date	Contact method	Additional solicitors
02/12/2008	Schedule Interes	Monica Williams	Cultivation	Planned		Phone call	
03/03/2008	Assess Interests	Jessica Biel	Cultivation	Planned		Meeting	
03/08/2008	Prospect Review	Zachery Allenbaugh	Identification	Planned			
03/23/2008	Schedule Follow-	Jessica Biel	Cultivation	Planned		Phone call	
04/07/2008	Present Funding	Monica Williams	Cultivation	Planned			
04/12/2008	Define Opportun	Monica Williams	Cultivation	Planned			
04/22/2008	Request Permissi	Monica Williams	Cultivation	Planned			
*							

Adjusted expected dates: Forward 1 Day(s) Adjust dates

Save Cancel

Completed	02/01/2008	Monica Williams	Informal Contact	Identification	Phone call
Completed	01/15/2008	Zachery Allenbaugh	Gather Info	Identification	Email

Connected to BBInfinity at http://localhost/bbAppFx-BBEC1.4/ as BBNT\jimb


start 2 Mic... 4. The ... Micros... Major ... 11:10 AM

# Event Management

2008 Reunion Dinner - Blackbaud Enterprise

File Go View Tasks Favorites Tools Help

2008 Reunion Dinner

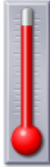
Event date: 02/15/2008 Status:  Active


Site:

Location: Brooks Dining Hall  
1321B East Bay St.  
Charleston, AK 29083


Contact: [Hampton Abrahms](#)



Coordinator:

Event expenses  Expense budget: \$2,422.32  
Expense total: \$2,125.00  
88.00% of budget

Event capacity  Event capacity: 150  
Will attend: 30  
Will not attend: 0  
20.00% of capacity

Tasks Registrants Groups Expenses Options Invitations Documentation Coordinators

**Registrants**  Go to registrant Add Edit Delete Mark as will not attend Mark as attended

Registrant	Status	Online registrant	Balance	Host	Attended
<b>&lt;None&gt;</b>					
Agnes M. Cone			\$0.00		No
Barrett J. O'Malley			\$0.00		No
Bethany M. Taylor			\$0.00		No
James L. Ballou			\$20.00		No
<b>Alan C. Hayes</b>					
 Alan C. Hayes			\$40.00	Alan C. Hayes	No
Mary Hayes			\$0.00	Alan C. Hayes	No
<b>Andrea L. Tidwell</b>					
 Andrea L. Tidwell			\$80.00	Andrea L. Tidwell	No
Anne C. Sindair			\$0.00	Andrea L. Tidwell	No
Anthony S. Ellis			\$0.00	Andrea L. Tidwell	No

Tasks Favorites

Connected to BBInfinity at http://localhost/bbAppFx-BBEC1.4/ as BBNT\jimb

start 2 Mic... 101. F... Micros... 2008 R... 11:14 AM

# The Technology stack

- Smart Client (ClickOnce) – over a web connection
- Blackbaud have built a 3 layer architecture:
  - Role/Process focussed modular top layer
  - Open Standards - Web service middle layer
  - Microsoft .Net 2 / SQL Server foundations
- ‘Relatively’ easy to build new modules – this doesn’t mean cheap.

# ClickOnce

- MS Brand - a web application technology that is part of the Windows platform
- Provides all of the traditional benefits that make web applications popular:
  - No install is required on the client.
  - The user does not have to be an admin to use the application.
  - The application is accessed via a web URL via standard HTTP.
  - The user always is running the latest version of the app.
  - The administrator simply updates files on the server to upgrade to a new version or patch.
- ClickOnce applications have full access to the entirety of the Windows Platform Win32 API (classic Windows API)
  - COM (for driving Word and other Office apps)
  - .Net Framework Class Libraries (including whatever features are in APIs, including the latest version, such as WPF and WF)

# ClickOnce (2)

- Can run outside of the web browser sandbox restrictions so if the application needs to do something like drive Outlook or Microsoft Word then there are no special considerations - it just works like a non-web Windows application.
- The SQL Server 2005 Report Builder application uses ClickOnce to deliver a rich ad-hoc report-authoring tool via the Report Services web server.
- **Some similar web application technologies**
  - Java
  - Flash (Flex/Apollo)
  - ActiveX
  - AJAX – most similar
- ClickOnce apps can be developed using C#, VB, jscript, J#, C++, or any .Net language. Blackbaud use VB.Net for Infinity.

# ClickOnce (3)

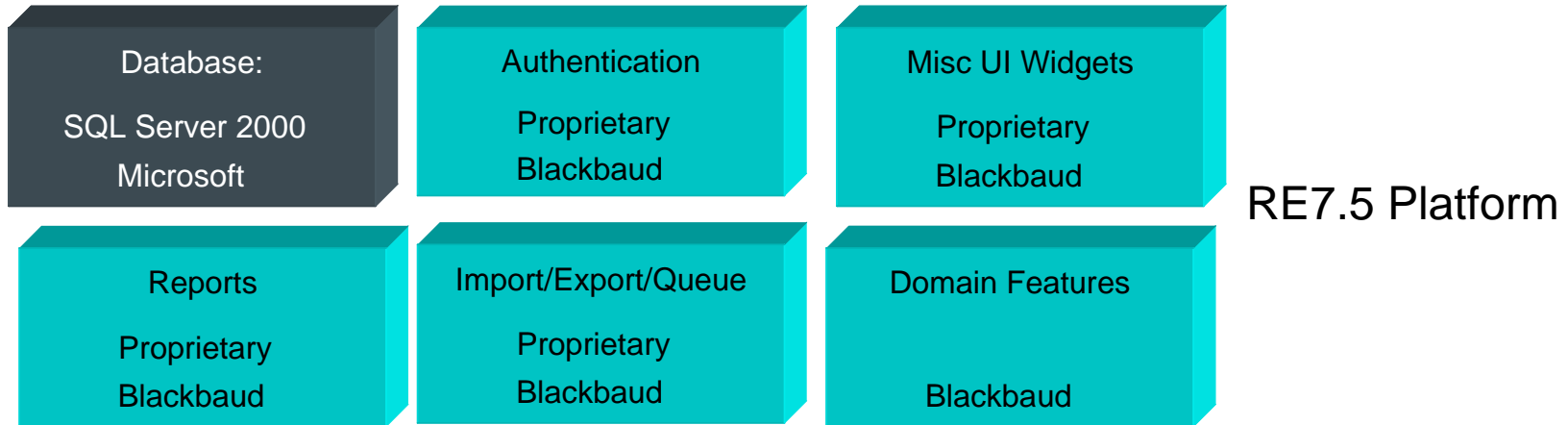
- ClickOnce is a Windows platform technology. Therefore, applications designed for ClickOnce can **ONLY** be used from a computer running Windows.
- The ability to have full access to the Windows API is ClickOnce's greatest strength, it is also a deal breaker if the application is required to support non-Windows operating systems. (Though it could be used over a remote session to a Terminal server!).
- All application services are also available via SOAP web service calls via HTTP/S and Xml. In addition some features are delivered via HTML and other non-ClickOnce mechanisms (e.g. reporting from MS SQL Reporting Services).

# ClickOnce (4)

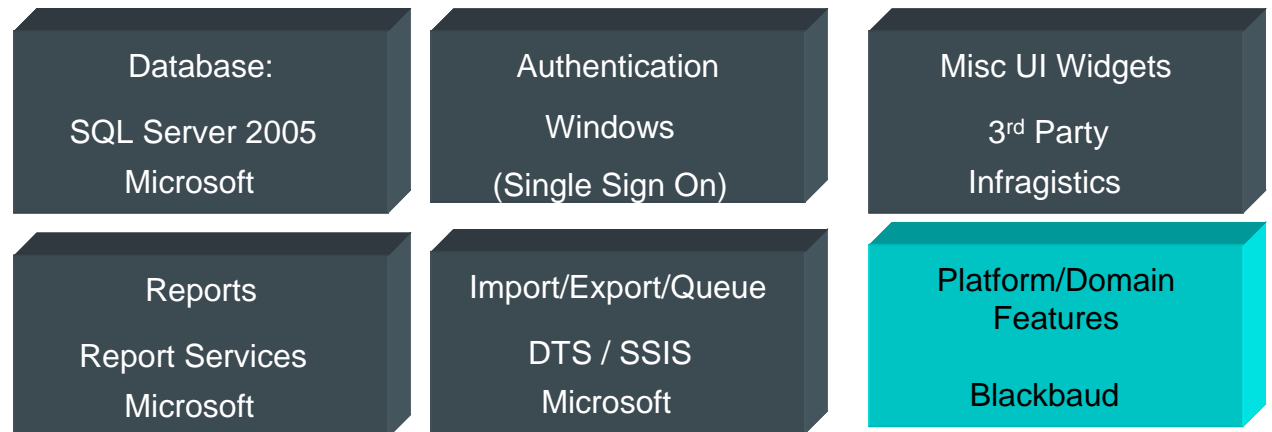
- On first use – by accessing the URL - a set of compressed files is downloaded and extracted into a per-use cache on the client. The app launches and runs like any other Windows application.
- The next time the user accesses the URL the app simply launches from the cached copy.
- If the administrator updates the files that are part of the ClickOnce app on the server, the next time the user clicks the url the new compressed files are downloaded automatically. Therefore a user always runs the latest version of the app.
- ClickOnce compares the cache timestamp vs. the current server timestamp - The current compressed size is ~7MB.
- No special configuration of Windows required for ClickOnce – XP or Vista (latest SP's)
- Must have .Net Framework 2.0 installed.



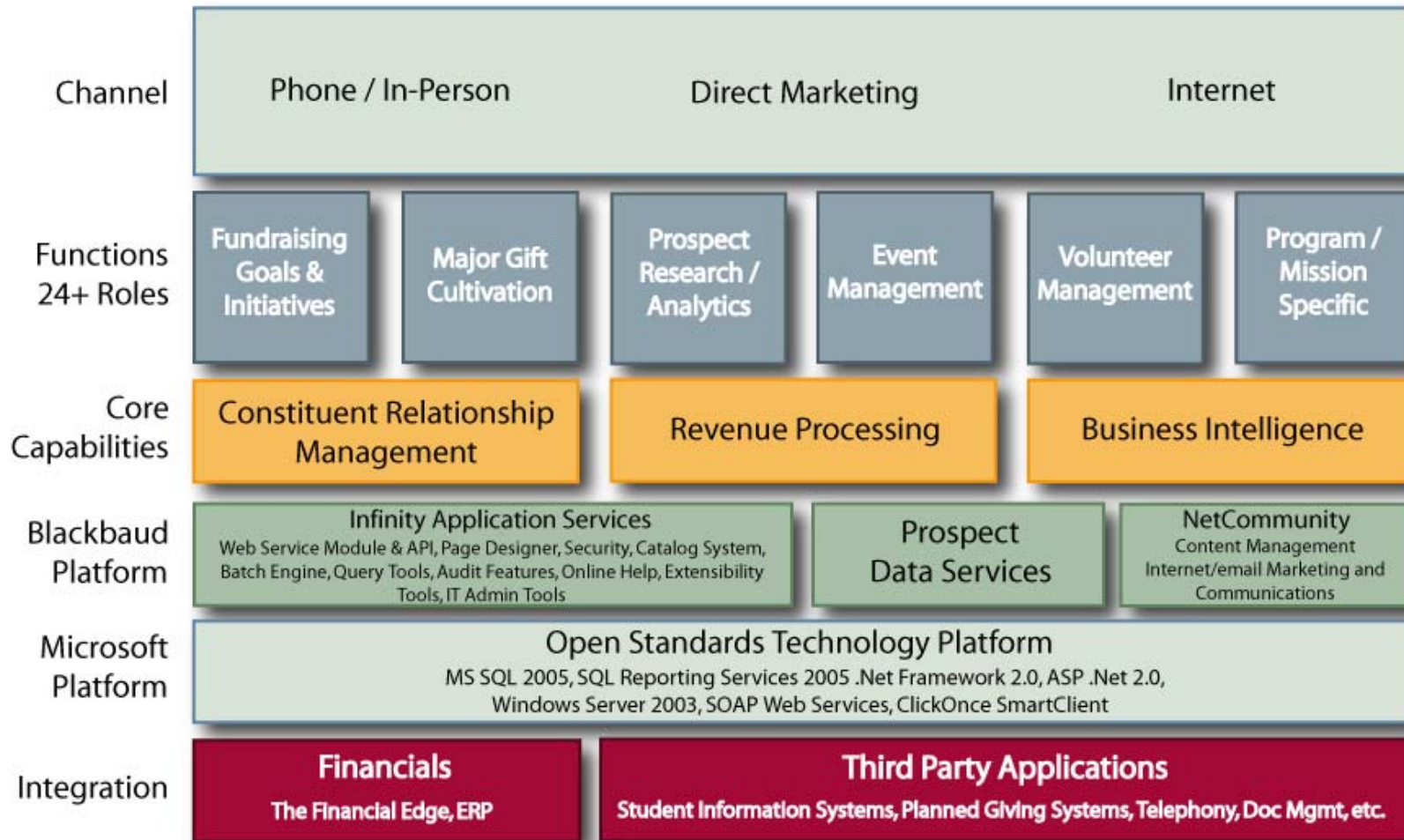
# Change of architecture and emphasis



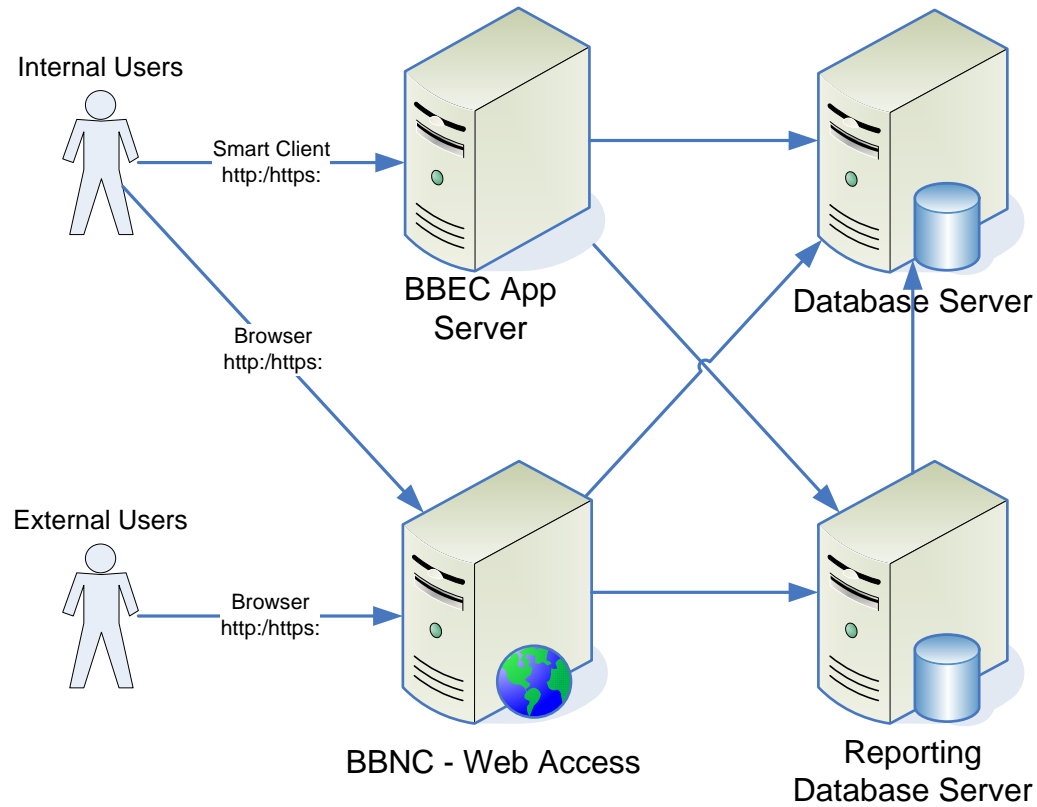
## Infinity (BBEC) Platform



# Business and IT Architecture



# Deployment and Connectivity

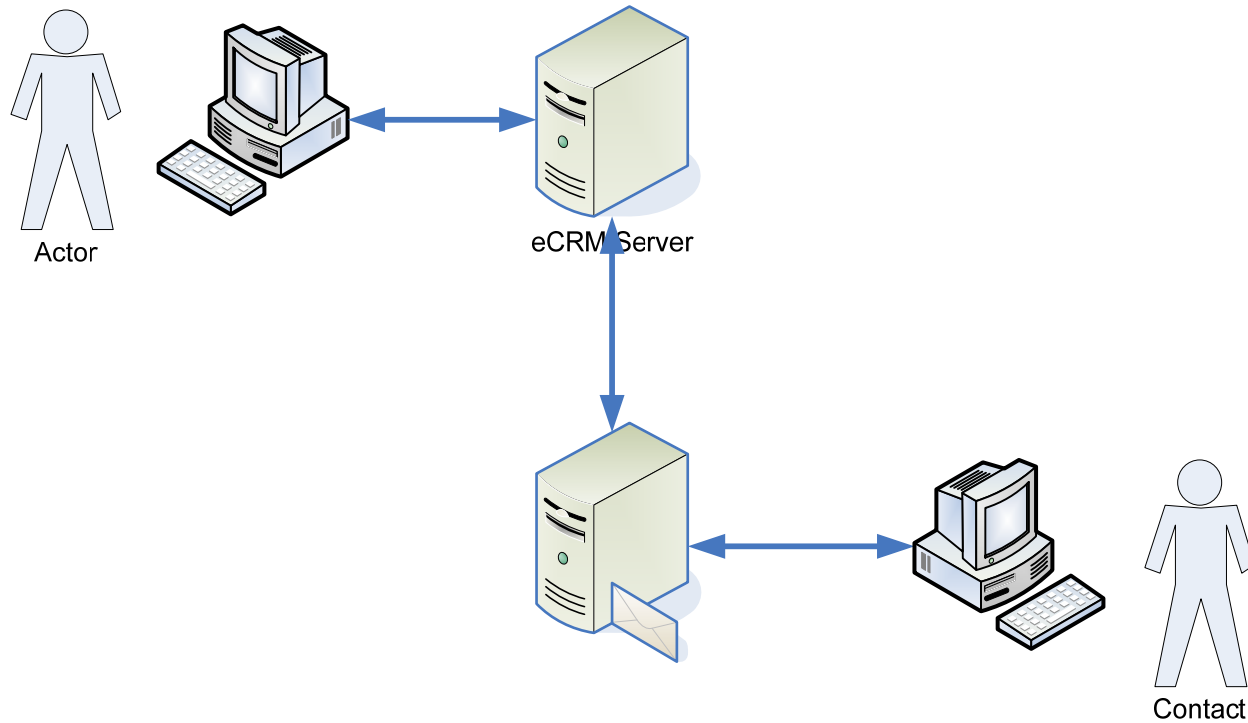


MS Exchange Server?

# MS Exchange Server

- Email (through routing)
- Contact data
- Diary/Calendar
- Downloads (for set-up)
  
- Synchronisation
- Multiple Servers

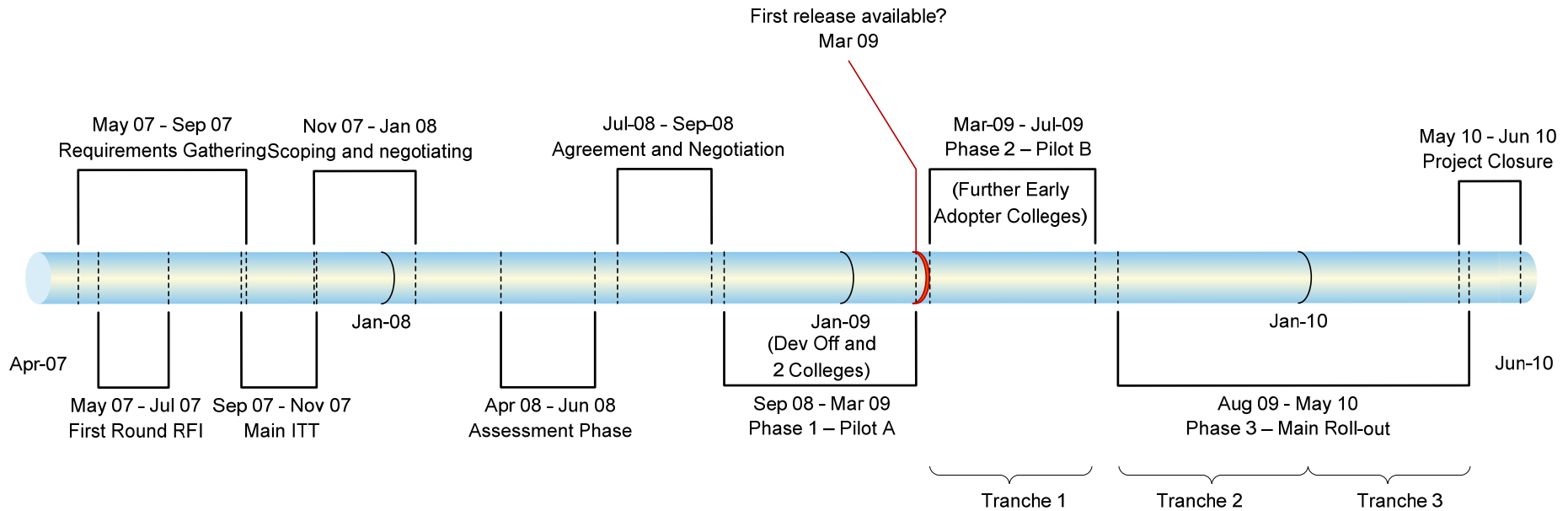
# Email Routing



# Data Migration Issues

- Cleaned data before starting (an assessment will usually be made jointly by the source group and the project team).
- Most migrations will have an established template starting point (unless completely bespoke source app).
- MS SQL Integration Services utilised to aid the import of data
- Iterative process of checking accuracy of migration.
- May have to decide to 'cut our losses' and add some residual data by hand again.
- There is always something 'unique' in a source.

# Current Project Status



Any Questions?