Guidelines Concerning Alumni/Development Computer Applications Access

ADVANCE C/S

Advance C/S security profiles include the following:

- Biographical Records Inquiry and Maintenance
- Giving Inquiry and Maintenance
- Alumni Membership Inquiry and Maintenance
- Prospect Tracking Inquiry and Maintenance

Employees of the Office of University Development are granted access to Biographical Inquiry, Giving Inquiry, Alumni Membership, and Prospect Tracking.

Employees of the Alumni Association employees are granted access to Biographical Inquiry, Giving Inquiry, Prospect Tracking and Alumni Membership.

Access is generally restricted to the Director of Development in the colleges and their immediate staff. Security profiles will be assigned for positions not on the University Development home budget based upon the positions job description and the relationship with the Division of Development and Alumni Relations.

Additional approval from the unit’s Director of Development will be required for system access and access will be provided on a need to know basis. The Director will be responsible for educating the staff in the unit on the appropriate use and access policies of Development data. Training will be required in order to be granted access to the system.

Giving Inquiry access is granted to employees of University Development and those staff whose fundraising duties are included in their job description. Employees considered as development staff include the following (applies to University Park, Campus Colleges, and Commonwealth Colleges):

- Employees who are on the University Development home budget.
- Employees who are on the University Alumni home budget who have had the proper training on the Gift Data.
- Employees who are not on the University home budget and work in a development office or have development job functions in their job description.

¾ Such positions would include and are not limited to staff assistants, administrative assistants, and positions in University Relations, External Relations, Stewardship and College Relations.

¾ Development job functions may include gift acknowledgements, pledge reminders, travel for director of development, processing of gifts received, stewardship, gift accounting in the college, staff support for development positions, Deans and CEO’s.
Giving Maintenance (BSR) access is granted to staff in the office of Donor Services. Remote sites responsible for gift processing include Hershey, Dickinson and WPSX/WPSU. Only those staff responsible for recording gifts will be provided update access. Exceptions may be made during peak processing times based on requests from the Director of Donor Services.

Biographical Inquiry access requested by non-development and non-alumni employees will need additional approval from the Director of Information Systems. Such positions would include and are not limited to students, staff assistants in non-development offices, and part-time staff. Other University offices such as Admissions, and the Registrar’s office will be provided limited name, address and degree look up functions.

Biographical Maintenance (BSR) access is granted to development employees in the office of Donor Services, Alumni Data Access, and central Development offices. External sites with Biographical maintenance include Hershey, Dickinson, and WPSX/WPSU. Other development employees requesting Bio maintenance access in order to perform their job responsibilities must be trained and will need approval from the Director of Information Systems.

Prospect Tracking access is granted to all employees of the Office of University Development and some of the Alumni Relations.

Access to Report of Contacts will be provided in Advance C/S. This includes all Development staff, non-development staff that will be visiting donors, and Deans and CEO’s (if requested). All non-development requests will require additional approval from the unit’s Director of Development.

Generally speaking, employees not on the Office of University Developments home budget must have fundraising duties in their job description to get access to Reports of Contacts.

WPSX/WPSU Membership (BSR) is granted to development employees in the WPSX/WPSU development office.

LOTUS NOTES

OUD Staff – Access to ALL Development databases. This includes all Development staff at University Park, Behrend, Dickinson, Great Valley, Abington, Berks-Lehigh Valley, Altoona.

DIA Staff – Access to ALL Development databases, EXCEPT Research Reports. This includes all Development staff from campuses, ROC users who are not in OUD (certain colleges, etc.)

Alumni – Access to all Alumni databases - No access to any development databases except by special request and approval.

iFILES / RESEARCH REPORTS

All employees of the Office of Development are eligible to have iFiles and Research Reports access pending their supervisor’s approval. Non-Development staff assistants who work in college Development offices are also eligible pending approval of the supervising Director of Development and the iFiles/Research Reports security review team. iFiles security is restricted by individual IP address at each unit.
DATA WAREHOUSE

Data Warehouse access is given to only users who have demonstrated their ability to be a computer "power user". They must:

- Have an excellent understanding of Advance data
- Have experience using database applications and,
- Know how to do an Open Database Connectivity (ODBC) query using TCP/IP communications.

There are two levels of security, which include Bio only or All. Bio only access is primarily granted to employees who are interested in only Biographical information and access to All is granted to those who need gift and prospect tracking information.

Programmers in the college/unit who support a development function or program will be provided access to the data warehouse, i.e., Dickinson and Behrend.

LAUNCH PAD

The Launch Pad is used as a tool for web communications within the Office of University Development. All employees of the Division of Development and University relations are provided access to launch pad.

Confidential information is provided on Launch Pad and access may be provided to users outside of Development and Alumni Relations. This access will be provided on a need to know basis. Access to launch pad may be also given to those serving as volunteers to the Office of University Development.

*Any exceptions to this policy must be requested to the Director of Information Systems and approved by the Associate Vice President for Development and Alumni Relations.*