

**MINUTES**  
**SUNGARD ADVANCE ADVISORY COMMITTEE MEETING**  
**February 22, 2007**

**PRESENT:**

**UMBC:** Megan Rolenc, Phil Recchio, Kevin Gibbons-Oneill  
**UMCP:** Carolyn Bayle, Anissa Holmes, Kevin Ngugi, Sheila Young  
**UMES:** Deborah Robinson, Chenita Kollock, Sylvia Wells  
**UMF:** Randy Possehl  
**TU:** Jeri Bielas  
**UMUC:** Dharma Selva, Tara Goodman  
**USM:** Vladimir Jirinec, Betty Jennings, Joseph Ng

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**Next Advisory Board Meeting: March 29, 2007**

- 1) **Review of Last Meeting Notes** – no additions or corrections.
- 2) **Lost Alumni Finder**
  - Vlad distributed a report showing the costs for the Lost Alumni Finder service for the month of January.
- 3) **BSR bugs/Quality Checks**
  - **Do not contact on Main Entity Screen for organizations** – The do not contact information does not display on the front screen (Entity Profile window) for organizations. We have discovered that this was overlooked when we implemented this feature for individuals. We will be releasing a fix to bug in the near future.
  - **Gift/Pledge receipt error in batches with more than one allocation** – We have received a fix from Sungard and it has been applied to the database. This problem should no longer occur.
- 4) **Mailing List Cleanup**
  - Some institutions have made corrections. It was agreed that the list needs to be re-run and distributed.
- 5) **Prospect Tracking for Orgs with multiple records (CP)**
  - UMCP asked how other campuses are identifying which organization record is the primary record used for prospect tracking. Towson is currently using the TUP name record type to identify the primary organization record.
- 6) **Baha’i entities in Advance** (see attached)
  - A list of all Baha’i records was distributed along with a description of the organization. Everyone agreed that all Baha’i entities should be religious organizations.
- 7) **New Prospect rating code** (CP – see attached)
  - UMCP requested that we add a new rating called “See contact reports on Corp. HQ record”. Everyone agreed to add this rating.

- 8) **New Special Handling Code for IRA rollover** (see attached)
  - A long discussion took place about the Special Handling code as well as the Source code in the Gift Entity Ledger. A new special handling code of “No Receipt” will be added and a count will be generated on all the codes in both fields. This topic will be addressed at the next meeting
- 9) **New Contact Report Type** (BC – see attached)
  - UMBC asked that a “Note” contact report type be created. Everyone agreed that this will confuse the existing “Report + Research” contact report type. This code will not be added.
- 10) **New Business**
  - The upcoming Sungard User Group is March 19-22 in Las Vegas.
- 11) **Next Meeting Date – Thursday, March 29**
- 12) **Online Resources (Dedup/Random)** (demo)
- 13) **Custom Report** (demo)
- 14) **Advance Online Interface** (demo)