

MINUTES
SUNGARD ADVANCE ADVISORY COMMITTEE MEETING
March 13, 2008

ATTENDEES:

UMBC: Megan Rolenc
UMCP: Aaron Armstrong, Carolyn Bayle, Anissa Holmes
UMES: Chenita Kollock, Deborah Robinson
UMF:
TU: Roger Lowe
UMUC:
USM: Betty Jennings, Vladimir Jirinec, Joseph Ng, Melody Tippet

Next Advisory Board Meeting: April 10, 2008

- 1. Review of Last Meeting Notes** – no additions or corrections.
- 2. BSR bugs/Quality Checks** – Vlad reported that SunGard has fixed the bug in Prospect Summary drill down to Allocation Task.

Vlad mentioned that there is another bug that has been identified in the Prospect Summary Window where the drop down list is missing. The most recent report was in the job status drop down list. Sungard is aware of the problem. Vlad stated that this is probably a memory leak. If you experience this problem, you need to logout and log back in to populate the drop down menu.

Vlad provided a copy of screenshot of an Advance Database Error that was reported this past month. The error message reads “Number 9558 Select error: Character or binary data returned from Adaptive truncated. The client application does not support more than 255 bytes of data as a result column or output parameter.” This message is received when a person’s address is very long. Sungard does not have an estimate timeframe for a fix for this bug.

- 3. Former Parent** – Betty and Joseph have finished updating Students and Former Students. Betty said that there is a big difference between a Parent and a Former Parent. A Former Parent of a Student that did not graduate is different than a Former Parent of a Student that graduated. If all Parents are marked Former Parents, no one will know the difference between the two. Betty asked if this is going to be a problem for anyone. After a discussion regarding how Former Parents are identified for phonathon’s, it was decided that it did not make a difference if the student did graduate or did not graduate.
Action Item: Betty will notify everyone when the update has been completed for Former Parents.
- 4. Donor Advised Funds Record Type** – Vlad reported that half of the entities have been added.
Action Item: Vlad will finish creating the entities by the end of March. He will also update the Affiliation program so that a campus Affiliation will be created for entities whose record type is DA.
- 5. HEP Matching Screening** – Vlad stated that everyone should have been contacted by HEP regarding HEP’s additional service to automatically mail out the Matching Gift Form to the employee. Several people have not been contacted. Vlad will follow up with HEP about contacting everyone. Carolyn asked how HEP handled Electronic Forms for Matching Gifts. Vlad checked with HEP and their process is to send a letter advising the donor to go to a specific website to complete the Matching Gift Form.
Action Item: Vlad will contact the Vendor again to ensure everyone that is interested is contacted.

- 6. Frostburg** – Vlad reported that Frostburg State University has decided to move from PeopleSoft to Advance. The conversion of data started this month. Frostburg has approximately 30,000 alumni records. Roger asked how duplicates, address changes etc would be handled during the conversion. Vlad said that each duplicate and update will be reviewed. The appropriate school will be notified before any decision is made as to how to handle the record. Addresses will not be changed until both schools agree. Carolyn asked Vlad if he was getting any additional resources to assist in supporting Frostburg. Vlad said no additional resources were needed at this time. He thinks that after the conversion and implementation are completed, there should not be a significant increase in work for his team. He agreed to monitor and track the workload in case there is a need for additional resources. Vlad and Melody will be going to Frostburg on March 19 & 20 to begin Advance training.
Action Item: Vlad will track and monitor his team’s workload for Frostburg. The appropriate schools will be notified of any duplicates or discrepancies with data from Frostburg.
- 7. Sungard Summit 2008** – is being held April 13 to 16 in Anaheim, California. Vlad asked who was going to attend the Summit. Randy reported last month that he had registered. Annisa is planning on going but has not registered. Vlad mentioned that last year mid year conference was very informative. Melody will include the date and location on the minutes for the mid year conference.
Action Item: The mid year conference this year will be held in Chicago, IL on August 15-20. The Summit for 2009 will be held in Philadelphia, Pennsylvania on March 22 to 25.
- 8. Training/Documentation Update** – Melody reviewed the Entity and Record Type documentation with the team. It was suggested by several people that the definition of Alumni should be changed from *Former students-full or part time, undergraduate or graduate who has received a certificate or degree* to *Person who received a certificate or degree*. Everyone agreed with this change. There was a concern about the example of ING as a foundation. Roger said that Joyce had told him it was a Corporation not a Foundation.
Action Item: Vlad spoke with Joyce Marx about the Corporate Foundations and Roger's understanding is correct. If a company starts/funds a foundation then the foundation should be marked as a corporation not a foundation. Melody will update the Entity and Record Type documents and send them out in a separate email. Everyone should review and send feedback to Melody by April 7th. At the next meeting, we will review the feedback and make final changes on the documentation.
- 9. New Business**

 - Vlad reported that a job position has been posted for his team. Melody is the Search Committee Chair. If you know of anyone that may be interested in this position, the position number is 106834 and is available on <http://www.uhr.umd.edu/employment/listings.cfm?listing=20%20Exempt>
- 10. Next Meeting Date** - The next meeting will be held at the Elkins Building on Thursday, April 10, 2008 at 10:00 a.m.