

06292022 / 30062022 -- Consortium Leadership Community Meeting

Date and Time:

29 June 2022 - All items on the board
17:02 (UTC+00:00)

Facilitator:

Brian Parker

Attendees:

Mindee, Beth Dietzler (she/her)-PRAC, Andrew Chew, Katie Cullen, Beth Dietzler (she/her) PRAC, Michelle, Katie Lachance-Duffy, Phila Reg Arts Consortium, Gawain, Henry Kelly

Summary:

Actions:

Learnings:

Topics discussed:

Version 16! How's it going?

Votes: 7

Suggested by: Gawain

Comments:

- Brian Parker
Gawain: Currently looking at next summer for the v16 upgrade. More complexity as a consortium with multiple members compared to before when it was a solo database. Planning to get a DEV instance (third database) to start looking at v16 early with data.
- Gawain
General release now scheduled for Mid-July, maybe.
- Gawain
Education Customization hangup for both Beta testers: Tulsa and Woodruff (and UCB).
- Brian Parker
Henry: Have been beta testing but use the Education Registration Customization, so difficult

to move to v16 without that element being fully supported. Otherwise, there was a willingness to upgrade to v16, but the Education piece complicates that.

- Brian Parker
Katie Lachance-Duffy: Recently reviewed customizations with Tessitura and was surprised that some components will not be ready to go for general release. The most important components are not easily tested in a DEV environment. Team usually takes at least a month to test before putting into TEST to determine impacts. Plan to update DEV when the general release is out, and get members testing in the fall with a plan to possibly go live by December (3-4 month process).
- Brian Parker
Andrew: Rough timeline of mid-2023 has been communicated to members for the v16 upgrade, with specific thoughts and focus on TNEW customizations. Considering the addition of a DEV environment to get v16 in there and not impacting TEST ahead of plan.
- Brian Parker
Gawain: Have had a number of customizations done for the web, some of which have become Plugins through Tessitura, but the Plugins sometimes lose features compared to custom work. Some concern around the lifetime of customization work.
- Brian Parker
Andrew: Customizations can be a double-edged sword when we run up against major version upgrades.

how are consortiums dealing with member orgs sending mail to non-patrons, especially minors? Any concern for liability at the consortium level?

Votes: 3

Suggested by: Katie Lachance-Duffy, Phila Reg Arts Consortium

Comments:

- Brian Parker
Katie Lachance-Duffy: There are protection types that can be used in Tessitura to protect minors/VIPs/etc., but in a consortium environment only one protection type can be used. How are other consortia protecting patrons from being cross-contacted, especially when minors in the database are concerned? There are guidelines in place (suppress minors from extractions, etc.), but nothing strictly enforced.
- Brian Parker
Gawain: Only one organization does this; when using the Education Registration, a dummy address is added to the minor's record instead of an actual valid address.
- Brian Parker
Gawain: v16 might be bringing changes to Constituent Protections.

Contribution/Ticket First Date set up for Consortium – has anyone configured this/would be willing to share how?

Votes: 3

Suggested by: Katie Cullen

Comments:

- Brian Parker
Katie Cullen: We know that Tessitura can do this for a price with consulting. Development department has been interested in figuring out a solution for improved stewardship.

- Brian Parker
Katie Cullen: List criteria of Contribution First Date is not necessarily friendly to consortia where users don't see data if the very first contribution from a patron wasn't to the user's organization.
- Brian Parker
Katie Lachance-Duffy: It is possible and we have that stuff!
- Brian Parker
Gawain: Potentially update the List criteria to replace the view in use so that First Date information is returned even if the very first instance isn't at the corresponding organization.
- Brian Parker
Andrew: With contributions tied to Campaigns and Campaigns tied to control groups, should be possible to have a view specific by control groups.
- Brian Parker
Andrew: Have seen some similar things working with WordFly related to control group and subscribe dates.

Tessitura Merchant Services! How's it going?

Votes: 3

Suggested by: Henry Kelly

Comments:

- Brian Parker
Henry: Very serious about switching to TMS in Atlanta now that it can work with both TNEW and custom websites. Pretty tight consortium so decision-making isn't too difficult, but tangled a bit in the legal contract. Who's thinking about TMS sooner than later? Any gotchas from a consortium perspective?
- Brian Parker
Gawain: If you share CC accounts and use the TNEW stored card functionality, the card will show as remembered and available to use on all TNEW sites connected to that consortium.
- Brian Parker
Gawain: More technical concern about the university's relationship with the bank, which is trickier with TMS playing a role throughout the credit card process.
- Brian Parker
Andrew: Will probably be having the TMS conversation by the end of the year, but still waiting on availability in Asia-Pacific.
- Brian Parker
Henry: Some concern about Adyen (TMS) being located in the EU.
- Brian Parker
Beth: Has Tessitura been agreeable to redline comments in the TMS contracts? Work with some organizations that have some strict requirements.
- Brian Parker
Henry: Many of the terms related to Adyen aren't really changeable.
- Brian Parker
Gawain: Had some issues with other payment service providers through the university in the past (Stripe, etc.) but think that they may be more amenable to Adyen/TMS.
- Brian Parker
Andrew: Currently Windcave is the only option for Asia-Pacific, and they make it known in conversations with new members. Asking for a 36-month commitment for new users.
- Brian Parker

Beth: Some members have expressed concerns about using EMV devices in a full-time WFH scenario if it happens again.

Version 16 TNEW Customization system, anyone planning for it?

Votes: 3

Suggested by: Gawain

Comments:

- Brian Parker
Gawain: One fairly significant customization that Tessitura will no longer be supporting moving forward, eight total TNEW customizations in use right now. Feeling totally out of date about building web applications. Is anyone preparing to build or working with outside contractors to build?
- Brian Parker
Andrew: Evaluating and moving what is currently in place to the stored procedure customization or the web service customization with v16. Hoping that the changes don't end up being too time-consuming related to development and testing. Ensuring that custom work is functional in both the application and TNEW as requested by staff at member organizations.
- Brian Parker
Katie Lachance-Duffy: With the potential for so many individual TNEW sites in a consortium setting, how are people managing the needs of many along with what they are required to be doing? Currently working on stored procedure customizations instead of web primarily due to the ease of maintaining everything.
- Brian Parker
Gawain: Web service custom work can have limitations related to TNEW specifically. Luckily, only a small number of TNEW sites in the local database. Some difficulties related to scheduled RAMP outages and TNEW maintenance modes to be offline.