

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	October 30, 2006
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Tami Babbs, Sandy Wheeler, Lori Creek, Kim Harris, Cris Ealy, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

☞ Designations

- Tami and Kim completed the designation upload file. Jerilyn will send it to Libby. Kim has questions to discuss with Mike this week on VSE codes.

☞ Validation tables

● ATVCMTP, ATVDSTP, ATVDGRP

- ATVDSTP-these codes were updated and seem to be working well.
- ATVCMTP-Kim and Tami suggest that only the capital campaign (CC), annual campaign (AF), endowment campaign (EN) and other campaign (OT) be used. Libby will check to see if there is a referential integrity issue with these codes to determine if they are needed in the designation upload file. If there is not an integrity issue, the codes will be added later. If there is an integrity issue, the codes will be added to the upload file.
- ATVDGRP-there is still a question of what this table should be used for—is it used in any reports, etc? This is another question for Mike this week.

● Prospect Management

- The prospect management validation tables have been completed. Cris will confirm which ones she updated with Jerilyn and Libby so they can be recorded as completed. This will be the subject of this week's consulting session.

● Membership

- The membership validation tables have been completed. The membership rules form still needs to be completed. Conversion of membership data cannot be completed until the rules are entered in TEST.

☞ Honorary degrees

- Cris received a list of past honorary degree recipients and the degree they received. Jerilyn will send a request to the Student Process Team asking that these be added to the STVDEGC table.

☞ Testing conversion data in TEST

- There was some question on what we should be seeing in TEST for gift data. Some gift data did not convert due to the designation table not being complete. The team should verify that the gift information in Banner is accurate, not verify if all the gifts are there.
- Kim will send the team some information for testing matching gift information. This should be done on the 30th as the deadline for reviewing the matching gift information is the 30th. Since Kim is providing information on matching gifts, some of the testing will not have to be completed until November 1st.

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- Degree, subject and activity information are the three remaining areas of converted data.
- There was a question of what to look for in reviewing the AGRGUAX table. This should contain premium information for gifts. Libby will provide a list of constituents with premiums to aid in testing.
- T250 and ED activities will not be converted as activities. These values will be added to the ATVPROJ table. The PGIV subject value will not be used in the GTVSUBJ validation table but rather in ATVPROJ. The "RESR" value in ADS will not be converted to GTVSUBJ. Many of these notes are outdated and will be reviewed to determine if any should be manually entered.
- ☞ Duplicate Reports
 - Reports 3 and 6 are left to be completed. Report 5 was reviewed by both team members and Jerilyn is going to look through it again before passing it to Libby. The deadline for duplicate reports is November 8th.
- ☞ Security Matrix—was due October 27th
 - Tami, Sandy and Kim provided Jerilyn with a list of tables and forms that staff in their offices will need access to in Advancement. Once all the lists have been received Jerilyn will compile and provide to all team members to review. Classes of users will then be determined with appropriate security access established. These classes will then be tested prior to go live.
- ☞ Timeline
 - Kim had some questions to clarify what the timeline shows.
 - Libby will be marking several more items as completed.
 - The manual entries for AORCONT will need to be tested. Only a few records need to be entered.
 - Processes and reports need to be tested. The reporting subcommittee will be reviewing these. Libby indicated that Cas will sit on the reporting subcommittee.
- ☞ Householding
 - Libby asked what the team wants to do with householding. If the team wants to use it, it will need to be tested. This will be discussed on Monday, November 6th. A decision will be made then regarding the use of this and for which relationships.
- ☞ Cashiering/Payment Gateway
 - Libby will be serving on a committee to review how online payments will be processed. The team indicated that it is important to be able to accept online gifts and membership dues payments.
- ☞ Milestones
 - A question was raised regarding the status of milestones. Jerilyn will be reviewing the milestones to determine which have been completed this month.

Decisions Made

Decisions for referral

Tabled/Future discussion Items

Ongoing Task List, Action Items

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Item Identifier	Item Description	Owner	Target Completion Date	Status

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed: