

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	October 2, 2006
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Sandy Wheeler, Tami Babbs, Kim Harris, Lori Creek, Cris Ealy, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

#### ☞ Designations

- The full designation file will be uploaded during the next conversion run.
- There was a question of whether to maintain the ADS name for the designation or use the new Finance one. It was decided to maintain the current name as it is in ADS.
- There are old ADS funds without a corresponding Finance FOPAL. It was determined that these would become designation in Advancement with the same five character code as in ADS.
- Kim is going to look at ATVDSTP and ATVCMTTP again to make sure they are complete.
- There was discussion regarding the creation of different campaign codes for the areas of emphasis in the upcoming capital campaign.

#### ☞ Validation Tables

- ATVOCON
  - The extract and conversion scripts are loading ADS data as primary and secondary contacts. The legacy information is outdated and what should be kept can be manually entered. Libby will put the AORCONT.txt extract file in the Advancement folder on the repository. Kim will make the determination of what should be kept and Sandy will enter that information. Libby suggested only a portion of them be entered in the TEST instance for testing purposes as they will need to be entered with each conversion. All information for ATVOCON can be added into PROD at a later date.
- ATVFUND
  - There is nothing to crosswalk from ADS for this validation table. It is not required in Advancement. Kim asked if the seed data should be left as is or if it should be removed from the table.
- Matching Gift validation tables
  - The required tables have been completed. Kim has a question of where to record the number of months for continuous service required for a company to match an employee's gift. She will talk with Mike about this during our consulting session.
- ATVGIFT, ATVGIVH
  - Annuity trust is listed in ATVGIVH but not the ATVGIFT. There was not anything in the extract/conversion for annuity trusts.
  - There is also a question of what rule class to use for gifts like gift annuities that could fall under more than one rule class.

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- A web credit card gift will be added to ATVGIFT.
- STVMAJR
  - We are waiting for three more majors to be added. Once they are added to STVMAJR by student, the crosswalk can be completed.
- GTVSUBJ
  - Several of the note categories used in ADS are being pulled through the extract/conversion program. One of the categories does not need to be converted-RESR. Jerilyn will review these and provide to Libby which ones should be converted.
- Prospect Management validation tables
  - These tables should be completed by mid to late October, prior to the consulting session October 31-November 2.
- ☞ Procedures Documentation
  - Constituents and Organizations
    - Cris has been reviewing the documentation Sandy received from another school. She has asked the team to review that information and give her any thoughts on how to proceed.
  - Gifts and Pledges
    - Sandy drafted simple gift and simple pledge procedures. She asked that everyone try to follow them with an example in TEST and let her know of any changes.
  - We anticipate that we will have two sets of procedures: one for those who will be updating information and one for those who will just have query-only access.
- ☞ Testing conversion data in TEST
  - The team discussed testing data in stages so everyone would be testing the same items at the same time. Any issues would be passed back to ITS in stages providing them with time to address the issues. All testing for this conversion run should be completed by the second week of November. Target dates for the stages will be determined at the next meeting.
- ☞ Next consulting session
  - The consulting session for October 3-5 was discussed.
- ☞ ODS
  - Jocelyn Clark indicated to Kim that Joanne Keys is a key ODS consultant for Advancement. Jerilyn will speak to Bill about requesting Joanne for our ODS functional session as well as trying to schedule that for sometime in February.

### Decisions Made

### Decisions for referral

### Tabled/Future discussion Items

#### Ongoing Task List, Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

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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:**