

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	October 9, 2006
Time:	10:30 am – 12:00 pm
Place:	Neal Welcome Center
Attendees:	Lori Creek, Sandy Wheeler, Tami Babbs, Kim Harris, Cris Ealy, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Designations-October 20 deadline for final completion of designation file
 - Departments are being added to the upload file. Tami has provided the missing FOPAL information.
 - Once the designations have been loaded in TEST, Sandy will enter any new designations in TEST after creating them in ADS.
- ☞ Validation Tables
 - GTVSUBJ
 - Jerilyn will send Libby the list of values to keep.
 - ATVDSTP
 - ATVCMTPT
 - Kim will finish these two tables.
 - ATVMOVE
 - ATVPROJ
 - ATVPROP
 - AVTPRST
 - ATVRATE
 - ATVREFR
 - ATVRSCR
 - ATVRTGT
 - ATVSCRS
 - ATVSOLT
 - ATVSORC
 - ATVSOTP
 - ATVSSTA
 - ATVSTFT
 - The above tables relate to prospect management and solicitor organization. Cris and Lori will be working on setting up these tables before the next consulting session. Lee provided a conversion script for converting the Blackbaud ratings into Banner.
 - ATVAMCT
 - ATVAMTP
 - ATVAMST
 - Jerilyn will set up these membership validation tables.
- ☞ Procedures Documentation
 - Constituents and Organizations-draft to be completed by October 13

EISE Project Meeting Notes Eastern Illinois University

- Sandy will be assisting Cris in drafting the procedures. Kim asked if householding will be included in the documentation. This is something that we need to test to see how conversion works with the householding feature. The deadline will be extended to October 20 for the draft.
- Gifts and Pledges-draft to be completed by October 20
 - Sandy has placed draft procedures on the repository. Any feedback by the team needs to be sent to Sandy by October 20.
 - Rules for hard/soft credit still need to be determined. Tami will check with Rick on these rules.
 - Mike suggested during a previous consulting session that gifts should be entered with an effective date to coincide with the postmarked date of the gift. This matches IRS stipulations. Tami will also discuss this with Rick.
 - Kim will share information regarding payroll deductions from Summit with the team.
 - Mike is to send more information on premiums following the last consulting session.
- Testing conversion data in TEST
 - Testing plan
 - Conversion data was divided into sections.
 - Target dates for test phases
 - Dates were agreed upon to complete testing in sections. Any issues with each section must be shared with Jerilyn and Libby by the scheduled date.
 - Schedule testing days
 - Team testing days were scheduled for October 12, 18, and 25 from 1:30-4:30. More extensive testing should be completed by individual team members outside of the team testing.
 - Jerilyn will provide crosswalk information for STVMAJR by Wednesday.
- Timeline
 - Libby distributed an updated timeline.
 - County codes will be ready for testing in about a week.
 - Processes and reports need to be tested as well as data conversion.
- Reporting
 - Libby indicated that the team should begin thinking about what reports/processes are to be handled through Appworx and e-Print as well as through Banner itself.
 - The use of FormFusion for membership cards and acknowledgement letters should also be considered.
- Duplicate Reports
 - New versions of the duplicate reports have been saved to the repository. Jerilyn will assign team members to the reports. They need to be reviewed and completed by November 8.
- Milestones
 - Tami requested more information for the list of milestones.
- Security classes
 - The team discussed how to determine what users need access and the type of access needed for the various forms.

**EISE Project Meeting Notes
Eastern Illinois University**

Decisions Made

Decisions for referral

Tabled/Future discussion Items

Ongoing Task List, Action Items

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: