

Joint Session of Foundation Functional & Technical Team
Go Live Readiness Meeting Minutes
March 15, 2011

Attendees: Chien Shih, Jim Clow, Robin Lyssenko, Vicki Liao, Henry Ly, Ron Rayas, Tom Roza, David Gilmore (SGHE), Noelle Hylton (SGHE) and Kari Elliott (note taker).

Objectives:

1. Data Conversion clearly mapped.
 - PIDM issues.
 - Gift issues – cannot enter.
 - Was able to enter gifts August 2010 in TST8; TST8 has been cloned December 2010 and March 9, 2011.
 - SGHE recommends running script to disable constraints so gifts can be entered.
 - Technical team & David Gilmore agree to run script in TST8; Vicki Liao ran script in TST8 and Noelle Hylton was able to enter a gift.
 - Chien Shih wants script to be run in PRODN and production before go live.
2. What functions are needed to Go Live.
 - Currently using 8.2.
 - Noelle Hylton & David Gilmore recommend using 8.3.1 or 8.4 because of known bugs with gift processing.
 - Tom Roza will begin researching 8.3.1 for technical side.
 - SGHE has a script to find broken gifts for 8.2; would need to run script for 8.3.1 as well.
 - Noelle Hylton will provide a list of all known issues to Robin Lyssenko.
 - Two scripts are identified and they need to be run after back end data conversion, these scripts are used to keep data buckets up to date.
 - Project team agree to go live with 8.2 and upgrade to 8.3.1 or 8.4 before July 1, 2011.

Go Live Issues:

1. Need script for hard credit/soft credit (**Go Live critical**).
 - Donorworks uses 1 record; Banner uses 2 records.
 - David Gilmore will convert soft credit into database.
 - Plan to complete – March 16, 2011.
2. Name Type (**Go Live Critical**).
 - Meeting scheduled March 16, 2011 with other team leads.
 - Currently name types are not being used, could over-write records.
 - Records converted have no name type. This is currently standard for all other teams.
 - Foundation will use alternative name in PIDM to address different salutation issue.
 - Will not change /add name type without core team agreement.
 - This consider solved for Go Live.
3. IHO/IMO – In honor of/In memory of (**Go Live Critical**).
 - Need mapping help from David Gilmore.

- Use gift class in Banner to track gift/pledge.
 - Robin Lyssenko will create spreadsheet (200 records) for Jim Clow to convert. The spread sheet will indicate IHO and IMO information, this is a manually transcribed information from Donerwork because of the IHO/IMO is free text field.
 - Plan to complete – March 16, 2011 (Robin)
 - Plan to complete – march 17, 2011 (Jim) to upload.
4. Matching Gifts (**Go Live Critical**).
- Hard credits have been brought over to Banner; soft credits have not.
 - Soft credits need to be extracted into Banner.
 - Create a dummy record – matching gift conversion for hard credit amount for employees linked to all records with soft credit.
 - Noelle Hylton will create Dummy Corporation for conversion and map out extraction.
 - Completed – March 15, 2011.
5. Remove unwanted seed value from tables.
- Remove Premium rules from gift society – functionality not being used.
 - Noelle Hylton removed from TST8 – March 15, 2011.
 - Ron Rayas removed from PROD – March 15, 2011.
 - Completed – March 15, 2011.
 - This is resolved for both test and production incidences.
6. Student interface with Advancement (track alumni).
- Complete conversion this week; begin testing and continue testing through next week.
 - Not Go Live critical.
7. Letter Generation – ARGOS Report.
- Need to report giving levels to board.
 - Send out acknowledgments.
 - Scheduling meeting for ARGOS reporting needs; ARGOS report available in May 2011.
8. SGHE Scripts.
- AFIXPD.SQL
 - AFIXGHIS.SQL
 - Run both scripts when there are broken gifts.
 - Run both scripts after conversation.
 - Run both scripts weekly after conversation run.
9. APRCONF – table is not load, part of Donorworks.
- 2 extracts needed:
 - AMRCONT – DM Contact Report (Donorworks).
 - APRCONF – DMMEMO (Donorworks).
 - There is a limitation on memo field size.
 - Ron Rayas will need data from Robin Lyssenko.
 - Test March 16, 2011.

Take Away Items:

1. Hard/Soft gift conversion - David Gilmore
 - Will need access to Banner database – Ron Rayas will grant access.

2. Matching Gifts – Robin Lyssenko run reports March 16, 2011 in morning; give EXCEL file to Jim Clow March 17, 2011.
3. IHO/IMO Conversion.
 - Need from Robin Lyssenko (200 records); give to Jim Clow March 16, 2011.
4. SGHE Scripts – run March 16, 2011 by end of day.
5. AMRCONT/APRCONF – test March 16, 2011.
6. Meet March 16, 2011 at 1:00pm in D260 to test go live process.