

Foundation Weekly Meeting Minutes

April 12, 2011, 9:00am-10:00am

Attendees: Chien Shih, Jennifer Dirking, Robin Lyssenko, Ron Rayas, Tom Roza, Laura Woodworth, Jim Clow, Hector Quinonez, Ngoc Nguyen, Scottie McDaniel, Nancy Chao, Jim Clow and Kari Elliott (note taker).

TESTHRS was cloned over last night, April 11, 2011 inadvertently. It will take 2 days to recover. Jim will start the recovery process today.

Noelle Hylton from SGHE will be onsite Wednesday April 13th and Thursday April 14th to help with testing of the interface with Finance and Payroll.

1. Interface with Finance:
 - Need to know how frequently Foundation wants to see record.
 - Daily; ETS needs to setup nightly auto process.
 - Will do manually in the beginning until all the hiccups are worked out.
 - Re-test data before Noelle is onsite – recreate Kathy's test from last week (Robin).
 - Need to know where in Foundation the gifts feed into Finance to reconcile.
2. Interface with Payroll:
 - Process for employee making a donation to Foundation.
 - Employee goes to Foundation – deduction code interface with Payroll.
 - Paper form filled out and given to Foundation to setup pledge.
 - Establish cutoff date.
 - Test interface when Noelle Hylton is onsite.
3. Technical Issue:
 - Status of David Gilmore's conversion.
 - Completed first step; ETS completed conversion (converted data from 1987).
 - Conversion still needs to be verified.
 - Wipe out and convert again.

Action Items:

1. Payroll issues to discuss with Noelle.
 - Entry deduction.
 - How interface works Payroll.
2. Finance issues to discuss with Noelle.
 - Process with Foundation.
 - Clear FOAP account with Finance for Foundation.
3. Re-enter PIDM data - recovery will take 2 days.
4. Re-convert Donorworks from 1987 to Banner database.