

Foundation Weekly Meeting Minutes-Revised

April 26, 2011, 9:00am-10:00am

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

David Gilmore from SGHE is onsite next week for technical support.

Chien will work with SGHE to have Noelle Hylton onsite next week for functional support.

1. Interface with Payroll:
 - Will go live with payroll deduction July 1, 2011.
 - Pledges will have to be entered ahead of time into Advancement.
2. Pledge Acknowledgement Letters:
 - ARGOS consultant working on; has specs
 - Robin would like to see how the process works.
 - Check data is in right field; can check without report being ready.
 - Make sure Banner data is correct.
3. Donor Category Code:
 - David Gilmore ran query and came up with 22; Robin does not think that is right and will ask Jim to run query again today to compare.
 - May be some influx still.

Process to Go Live:

1. Decide date to freeze Donorwork entries – April 27, 2011.
 - Freeze and take snapshot.
 - Transfer to Banner; verify number of records with snapshot.
 - Backup database.
2. Conversion – clone to pre-production (PRODN).
 - PRODN is currently being used by Student to test upgrades.
 - Will clone production to TEST8 instead; verify data.
 - Dual updates mode will begin once cloned.
 - Make changes in TEST8 first, verify correct, then make changes in PROD (production).
3. Contingency Plan:
 - David Gilmore from SGHE will onsite the week of May 2, 2011 for technical support.
 - Chien will work on having Noelle Hylton onsite the week of May 2, 2011 for functional support.

Rule Tables in PROD:

- Changes need to be made first in TEST8 and certified, then made in PROD.
- All changes must be made by Thursday, April 28, 2011.
- Clone from PROD to TEST8 will be done Thursday night April 28, 2011.

- Ngoc and Robin are ready to make changes in PROD for Finance interface.
- Friday night, April 20, 2011 begin feeding into Finance.
 - Feed will be done manually; automate later.
 - Test feed in TEST8 first and verify before feeding into PROD (live data).
 - There may not be a feed April 20, 2011 because of Robin's schedule.
- Broken Gift Scripts:
 - Verify with David Gilmore if there are 1 or 2 scripts to run and how often scripts should be run.
- Security – any changes made in TEST8 need to be made in PROD; Robin will verify.
- All cloning will be suspended until Thursday, April 28, 2011; Tom will send email to team leads.

Take Away Items:

1. Any changes made to rule and validation tables in TEST8 need to be verified and made in PROD by April 28, 2011 (verified by Foundation, Finance and Payroll).
2. Donorworks data dump needs to be verified by ETS by April 28, 2011.
3. Clone Thursday night April 28, 2011 from PROD to TEST8.
4. Final testing done Friday, April 29, 2011 in TEST8
 - Payroll request.
5. Report any issues to Robin and Chien to be resolved.
6. No issues; clone again Saturday night April 30, 2011.
7. Foundation will be in production May 2, 2011.