

## Foundation Weekly Meeting Minutes-Revised

May 3, 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, David Gilmore (SGHE) and Kari Elliott (note taker).

David Gilmore from SGHE is onsite this week for technical 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.

### Process to Go Live:

1. Donorworks is now frozen.
  - No more gifts are being entered.
2. Conversion – clone to pre-production (PRODN).
  - Begin Donorwork conversion May 3, 2011.
    - Process will take 1 ½ - 2 days.
    - 17,800 records to convert; 9,000 new records.
  - No major issues with rule and validation tables confirmed by David Gilmore & Robin.
  - Will clone production to TEST8; 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 be 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.

### Payroll & Finance:

- Comfortable with testing last week.
- Finance needs to make changes to rule and validation tables in production before cloning to TEST8; team is ok with Finance making changes in production.
- Foundation tested all scenarios and processes worked.
- Will manually feed into Finance on demand to make sure process works correctly; will automate later.
  - Feed will go directly into Foundation account in Finance.
  - Safe guards are in place for manually feeds so there is no duplication.
  - Back dating is ok with Finance.
- Issue with gift already posted in Finance (April) but will not be posted in Foundation until May.
  - Entangled Gifts need to be entered into Banner Advancement because Donorworks has been frozen.
  - Kathy will need to do a reverse cash receipt for April after gifts are entered in Advancement.
- Payroll deductions are renewed every fiscal year.

- Payroll needs to verify signatures for deductions.
- Need a way to automate signature verification for 250 existing employee deductions, then once every year for renewal.
  - David Gilmore & Noelle Hylton of SGHE will look into.

**Take Away Items:**

1. Team agrees Donorwork conversion can begin May 3, 2011.
2. Any changes made to rule and validation tables in TEST8 need to be verified and made in PROD by May 5, 2011 (verified by Foundation, Finance and Payroll).
3. Donorworks data dump needs to be verified by ETS by May 5, 2011.
4. Clone Thursday night May 5, 2011 from PROD to TEST8.
5. Final testing done Friday, May 6, 2011 in TEST8
6. Report any issues to Robin and Chien to be resolved.
7. No issues; clone again Saturday night May 7, 2011.
8. Foundation will be in production May 9, 2011.
9. After go live, will do parallel entry to Production and TST 8 for a week to make sure everything is OK. Cloning will be done on a nightly basis from Production to TST8 after go live.