

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	January 8, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Sandy Wheeler, Kim Harris, Lori Creek, Cris Ealy, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Reporting Subcommittee
 - The subcommittee has not met since before the Christmas break. Members of the subcommittee are testing Banner-supplied reports and comparing ODS data fields against the current ADS reporting fields. A meeting will be held prior to the next team meeting on January 22nd.
- ☞ Duplicate reports progress-due 1/19/2007
 - The duplicate reports are due to Jerilyn by January 19th. The reports will be passed on to IT at that point in preparation of the third conversion.
- ☞ TEST 2 testing progress-items due 12/22/2006, 1/12/2007, 1/26/2007
 - The first set of testing results was due by December 22nd. All results were received by team members and forwarded to Libby.
 - The second set of testing is due January 12th. Cris and Lori have encountered potential problems with the comments (APRCONF) and subject index code (APRSUBJ) conversions.
 - The third set of testing is due January 26th.
- ☞ TEST 2 load status
 - Jerilyn has been working through the error reports. There are some discrepancies between our current data in ADS and other areas already loaded into Banner in data fields such as birthdate, marital status, sex and ethnic code. We will need to determine how we are going to handle the discrepancies.
- ☞ Timeline
 - Items are still on target for the timeline. A third conversion is scheduled for the first part of February. A fourth conversion may be needed.
- ☞ Online giving and membership dues payments
 - Libby provided an update on the status of a cashiering system and payment gateway for Banner and online credit card payments. The current system utilized does not interface with Banner. A committee is reviewing several options. The committee will be seeing two demos next week. Libby will provide more information at the next team meeting on January 22nd.
- ☞ Procedures documentation
 - Campaigns and Designations
 - Cris will draft documentation on creating new campaign procedures.
 - Sandy will draft documentation on creating new designation procedures.
 - Matching Gift Information
 - Kim is drafting documentation for procedures on handling and processing matching gift company information.

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☞ Geographic regions

- We will have 318 geographic regions. The region codes have been entered in TEST. Jerilyn is working on entering the rules for each region code. She would like for another team member to review the rules once they have been entered to ensure there were no data entry errors.

☞ Outstanding issues

- Combined mailing and salutation load
 - Libby shared that the combined mailing name and salutations can be entered via batch load if common rules can be created. Exceptions to the rules will have to be manually entered.
- Multiple comments on gifts
 - Multiple comments for gifts are not available within Banner. There is only one comment per gift.
- Tracking batch number and receipt
 - Even though there can be only one comment per gift, it is possible to concatenate several items into the comment field. It was decided that the legacy batch ID number would be converted to the beginning of the gift comment field with the legacy receipt number to follow. Then any additional gift notes/comments in the legacy system would be added to the end of the comment field.

☞ Next consulting session

- 1/23-25/2007 Memberships and Events
 - An agenda should be coming soon for the consulting visit. Memberships and events do not necessarily pertain to everyone on the team so Jerilyn encouraged them to bring additional work to the session or decide which times to attend the session once the agenda has been received. It may not be necessary for every team member to be present during the full three days.

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

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Attachments and/or meeting Handouts listed: