

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	12/1/2005
Time:	8:30 am
Place:	Sullivan Room
Attendees:	Cris Ealy, Lori Creek, Kim Harris, Sandy Wheeler, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

- ☞ Data Standards Team update
  - Kim is working on finishing the document. Comments have been received by other groups and are being incorporated into the document. The document should be sent to the steering committee next week. There are still some outstanding issues that will be finished later.
- ☞ Finance Team update
  - There will need to be an interface for the ADS feed data to be fed to GURFEED and then to Finance for posting. A script is to be provided to help facilitate this interface but has not been received to date. There will also be an interface between Advancement and Finance when Advancement goes live.
  - A decision will need to be made on whether or not to feed pledges to Finance. This can either begin when Finance goes live or when Advancement goes live. Pledges currently are not fed to FRS and the team has questions on the advantages vs disadvantages of feeding pledges. Research will be done to help answer this question.
- ☞ Reporting Standards Team update
  - The team has met a few times and is working to determine who will work on which pieces of the reporting standards document. More information will be provided as this team moves forward.
- ☞ Alumni Name Type
  - Information was shared regarding the concern of other process teams for Advancement personnel to update and change names. The other process teams have requested that an alumni name type be used for any name changes made by Advancement. There are many questions surrounding this request that have not been answered yet. The question was posted on the Banner Alumni listserv and responses were shared with the team. Team members are to provide any feedback prior to December 12<sup>th</sup> so Jerilyn can take this back to the CFCG meeting on that date.
  - Some of the questions surrounding this are the possibility of having duplicate name entries for records, what would the current name screen reflect, how would this impact Advancement's ability to use the Banner supplied reports, how would this impact the warehouse capabilities upon which Advancement relies for reporting, would this have the potential for creating duplicate records, and the impact on individuals accessing the system knowing what is the current name of the individual.
- ☞ Address Source Codes

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- Address source codes were reviewed again as they were discussed at the last CFCG meeting. The team determined that it would like to keep the suggestion of having a source code for Alumni Finder and one for outside agency as these are viewed differently in our work and to have a source code for gift document. It was suggested that the description for the "WEB-world wide web" code be modified to reflect "WEB-self-service change" unless other process teams would plan to use the "WEB" code for address sources other than self-service.

### 👉 Banner Availability

- The availability of Banner was reviewed with the team. According to ITS, Banner should be available from noon to midnight unless an email is sent stating otherwise. From the hours of midnight to noon, the system may or may not be available depending on any activity for which ITS may need to bring the system down.

### 👉 Common Matching

- Examples from the users guide were distributed. Any comments/suggestions from the team should be forwarded to Jerilyn by December 12<sup>th</sup>.

### 👉 BPAs

- To ease the difficulties of trying to schedule BPA sessions for the whole team, the BPAs will be assigned to individuals on the team who will coordinate completing the process:

- Prospect Management: Cris and Lori
- Gift Management: Tami and Sandy
- Pledge Management: Kim
- Designation and Campaign Management: Kim and Tami
- Event Management: Jerilyn
- Membership Management: Jerilyn

### 👉 Data cleansing

- Libby shared that the "Big Bang" is still on schedule to occur around March. Discussion then ensued on some of the data cleansing items that needed to be addressed in addition to duplicate record progress. A list will be put together outlining the data cleansing items to be done and the progress monitored.
- The team requested that Libby look into the availability of keeping the ADS files open later than they currently are to facilitate data cleansing.

## Decisions Made

## Decisions for referral

## Tabled/Future discussion Items

### Ongoing Task List, Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

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**New Action Items**

Item Identifier	Item Description	Owner	Target Completion Date	Status

**Attachments and/or meeting Handouts listed:**