

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	January 5, 2006
Time:	8:30 am – 10:00 am
Place:	Shelbyville Room
Attendees:	Cris Ealy, Lori Creek, Tami Babbs, Sandy Wheeler, Kim Harris, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Data Standards Team update
 - The departmental directory standards are still in process. Kim will be helping Doug to finish this portion of the document. She is also doing some research for Doug for explanations needed. The team is working to complete the document to forward it to the Steering Committee for approval.
- ☞ Finance Team update
 - Tami reported that the team is working on some items in TEST that will go to the PRE-PROD instance. The team will have training on Fixed Assets this month. Tami will try to bring a copy of the org codes for the next Advancement Team meeting so the team can begin comparing the current fund codes to the new information in Finance.
- ☞ Reporting Standards Team update
 - The team is working on drafting a document specifying standards for reports, such as header and footer information. The team would like to do assess the University's needs for reporting. The document will also attempt to define an "official" report.
- ☞ Alumni Name Type
 - This item is still in discussion in CFCG.
- ☞ BPAs
 - The next BPA session is scheduled for January 9th and will cover campaign management and pledge management. The location has been changed to the ITS conference room. Cris asked if the earlier BPA documents could be resent so everyone is clear on the final document for each of them.
- ☞ Data Cleansing
 - Libby prepared reports for gender/prefix problems as discussed at the last team meeting. Cris, Lori, Tami and Sandy will be working on correcting these problems. Jerilyn and Kim are going to try to generate a report to look at other gender/prefix/name errors that may need to be corrected.
- ☞ ODS
 - The information contained in the SCT ODS were shared with the team. Libby will compare the fields in the ODS with what is currently available in the alumni warehouse and let the team know if they differ.
- ☞ Bonus Compensation
 - Jerilyn gave an overview of the basic plan for bonus or overtime compensation for the Advancement project. The actual plan will be provided once it has been approved by the Steering Committee.

EISE Project Meeting Notes Eastern Illinois University

☞ Site visits

- Kim asked about the possibility of a site visit. Jerilyn had discussed this with Steve Rich and if there is a school that would be agreeable to us visiting for a one day trip the expenses could be taken from the Alumni Services budget. Anyone with contacts to schools in the vicinity with Banner Advancement should let Jerilyn know so arrangements can be made.

☞ Crystal Reports training

- Kim asked about further Crystal Reports training. The team was asked to provide Jerilyn with some information they would like to see in training so arrangements could be made.

☞ Mass people load

- Libby shared that the mass load of people except for Advancement records has been loaded into TEST for teams to complete testing. The Advancement Team will begin testing their mass load after the team has its kick-off.

☞ ADS interface with Finance

- The interface is in process. The current procedures should not change to a great degree when Finance goes live in a few months.

☞ Extract program

- Libby and her team will begin working on the extract program for loading ADS data into Banner in the next couple of months.

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

Attachments and/or meeting Handouts listed: