

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	February 2, 2006
Time:	8:30 am – 10:00 am
Place:	Sullivan Room
Attendees:	Cris Ealy, Lori Creek, Sandy Wheeler, Tami Babbs, Kim Harris, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Data Standards Team update
 - The team is completing a final review of the document before sending it to the Steering Committee.
- ☞ Finance Team update
 - The team is working on the tasks needed to accomplish before the go-live date. A customer service team has been established for training. A reporting team and a security/approvals team have also been established. They are looking at Camtasia for some of the training needs.
- ☞ Reporting Standards Team update
 - The team is still working on the university reporting needs questionnaire and the draft of the reporting standards document.
- ☞ Alumni Name Type
 - The team discussed the ramifications of having an advancement name type to be used for any name changes made by an advancement staff member. The team agreed that they could adjust to having to use a specific name type. It is essential for advancement staff members to be able to update/change names.
- ☞ BPAs
 - There were a few misspellings and corrections identified from the last BPA sessions completed with Sandy Bowman. Kim will pass these along to Sandy.
- ☞ Data Cleansing
 - Revised gender/prefix reports were distributed for corrections to be made on ADS.
 - There are some degree information changes/updates that need to be made. Kim has some information ready for updating and will pass to Cris for updating. Some degrees still need to be researched.
 - Duplicate records are still being working on.
 - Some reports are needed to review names/prefixes/gender/maiden names to find problems that need to be corrected.
- ☞ Common Matching
 - Common matching rules are only applicable to users who will be adding records to Banner. The team should determine what matching rules that would be appropriate for the Advancement module for searching for possible matching records prior to adding a new record in Banner.
- ☞ Security Matrix
 - A draft list of forms in the Advancement module was distributed to team members. Classes of users need to be determined and will be used in assigning access to the Advancement module.

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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: