

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	March 13, 2006
Time:	9:00 am – 10:30 am
Place:	Casey Room
Attendees:	Cris Ealy, Lori Creek, Kim Harris, Tami Babbs, Sandy Wheeler, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

- ☞ Data Standards Team update
  - The document has been forwarded to the Steering Committee but was not fully completed. Some changes have been made and the team will be reconvening soon.
- ☞ Finance Team update
  - The team will be in a consulting session this week. The training committee is working on manuals. Training for the campus should begin sometime in April. The reporting committee is looking at the Banner supplied reports. Finance plans to continue utilizing E-print for report distribution.
- ☞ Reporting Standards Team update
  - The team is working on the document and hopes to complete the draft soon. The questionnaire results have been compiled and the information gained from the questionnaire will be used in the document.
- ☞ Alumni Name Type
  - The issue of updating names has been resolved for now. Advancement will maintain the ability to update names but will classify those names with an "advancement" name type.
- ☞ Data Cleansing
  - The gender/prefix changes have been corrected.
  - Cris has some of the degree changes that need to be made and she will be working on those. Kim is still putting together more degree changes that will need to be made.
  - Kim has been working on a name/gender/prefix report to help identify corrections that need to be made.
  - Lori will work on middle names that need to be added to ADS.
- ☞ Common Matching
  - Some suggested search combinations for common matching was shared. The team will need to determine the rules to follow within Banner common matching when adding new records. Tami suggested we look at what purchasing is working on with common matching as it might be similar. Libby indicated that the Student Team is also working on some common matching rules.
- ☞ Milestones for project
  - Jerilyn is still working on drafting milestones for the team. This will not be completed until closer to/right after kick-off when the team can discuss the milestones with our consultant.
- ☞ Security Matrix

## EISE Project Meeting Notes Eastern Illinois University

- The team is still looking at the different user types for Advancement to determine the security classes.

### ☞ Kick-Off

- Legacy data must meet the criteria specified in the Data Standards Document. Any corrections to the legacy data should be made prior to migrating it to Banner. Libby will work on some reports to identify records with old data in all uppercase lettering. There are also some older records which have addresses without zip+4 information.

### ☞ Next meeting

- The next meeting will be April 13<sup>th</sup> at 8:30 am. Jerilyn will arrange a meeting room for this meeting.

### 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: