

## **EISE Project Meeting Notes Eastern Illinois University**

Team/Group:	Advancement
Date:	November 27, 2006
Time:	10:30 am – 12:00 pm
Place:	Neal Welcome Center
Attendees:	Cris Ealy, Lori Creek, Kim Harris, Sandy Wheeler, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### **Agenda and discussion items**

- ☞ Reporting subcommittee
  - The subcommittee has reviewed the Banner-supplied reports, many of which look promising. The next step is to review the ODS data in more detail.
  - Bill mentioned that he put forward a request for our functional ODS consulting for February 2007.
  - Libby requested that she be emailed for any Banner-supplied reports/processes that are tested successfully so they can be checked off the timeline.
- ☞ Timeline
  - We are still on task. Libby needs to review the test cases from our first conversion round to see if any programming changes are needed. The next conversion will take place after that.
  - Prospect management information from BlackBaud still needs to be converted. David doesn't foresee a problem extracting the data.
  - Membership information needs to be converted as well.
  - Error reports and duplicate reports will be provided after the next conversion round too.
- ☞ Testing Dates
  - December 14, 15 and 19 were selected as group testing dates. The team will meet at the annual fund office in 9<sup>th</sup> Street Hall from 1:30-4:30 pm. Testing of the next conversion will need to be completed in December to remain on time.
- ☞ Security matrix information
  - The information for development officers has been provided to Jerilyn. She will work on putting them all together for a draft of security classes.
- ☞ Prospect management procedure manual draft
  - Cris will be working on drafting the manual.
- ☞ Next consulting session
  - Consulting will be at the lab in 9<sup>th</sup> Street Hall beginning at 8:30 am. We will be reviewing miscellaneous items with Mike as well as running some reports/processes.
- ☞ Outstanding issues
  - Kim updated the list of outstanding issues. Some of the issues will be discussed with Mike. The others will be discussed during an upcoming team meeting.

### **Decisions Made**

### **Decisions for referral**

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**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:**