

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	December 11, 2006
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Kim Harris, Tami Babbs, Sandy Wheeler, Cris Ealy, Lori Creek, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

☞ Reporting Subcommittee

- The subcommittee is continuing to test run the Banner-supplied reports. Once the next conversion has taken place and data is available in TEST, the remaining reports will be tested.
- The ODS data fields are being reviewed and compared to the current ADS reporting data fields to make sure all needed fields are available in the ODS.

☞ Testing Dates

- Group testing dates will be December 14th, 15th, 19th.
- General person data should be available by the 14th.
- David is working on the \$0 pledges and designations.
- Duplicate reports are available. Jerilyn will send out notification on who should review each report.

☞ Prospect management procedure manual draft

- The draft is complete and can be found on the repository for review.

☞ Timeline

- Test 2 conversion is taking a little longer than anticipated. Most items are still on target on the timeline.

☞ Outstanding issues

- We will review items 1, 2, 6, 8, 14, 15, 16 and any others if time available
- #1: Cris is asking Karla to review the base strategy plan. She will let us know if any changes are needed.
- #2: Endowment donor and top 250 donor codes have been determined to be in the special purpose tables. Cris will add this information to the validation tables. Jerilyn and Cris will look at how many records these codes pertain to for a determination if conversion is needed or if manually entry can be done.
- #6: One suggestion was to put the batch number in the gift comments. However, it may not be possible to have multiple comments for each gift. There is a receipt process to assign receipt numbers but there is a question of how that would impact conversion of legacy receipt numbers. We do have a need for storing the batch number as gift backup is filed according to this number. IT is looking at how the legacy receipt number can be converted. Another school posted a similar situation on BALUMNI. We may need to contact this person to see if any responses have been received.
- #8: Many legacy records have a business title but no actual employer name. Is an employer name needed for a title to be entered in Banner? Jerilyn will test this

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out in the TRAIN instance since we are converting our data into TEST right now. Tami suggested using the title for the employer name if one is needed.

- #14: The institution split credit rules have been completed.
- #15 and #16: The combined mailing name and salutation fields are used in Banner processes and reports. There are not any salutations in ADS to convert. It will need to be determined if IT can populate these fields or if manual data entry is needed. Salutations would impact all records and combined mailing name would impact all married records.

☞ Milestones

- Some of the dates for milestones may be adjusted due to the delay in the test 2 conversion. Several items will come closer to the end of the project, such as finalizing procedures documentation, training plans and training of end users.
- Team members were asked to review the procedures documentation drafts as time permits. Training needs should be considered as well as any cross-training needs.

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: