

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	March 5, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Lori Creek, Kim Harris, Libby Coffey, Cris Ealy, Sandy Wheeler, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

- ☞ Matching gifts and supplemental organizations
  - The subcommittee is working to schedule a meeting.
  - Kim has some things to check in TEST too but has been having difficulties accessing Banner.
- ☞ Procedures documentation
  - Matching Gift Information
  - Premium Gifts
  - Memberships
  - Event Management
  - 2<sup>nd</sup> draft
    - Procedures are still in progress. Cris and Jerilyn completed some of the outstanding constituent ones and forwarded to Lori and Tami for inclusion in 2<sup>nd</sup> draft.
- ☞ New Designations in TEST
  - Finance FOPALs need to be entered in TEST before Sandy can enter designations into TEST. She found out that she has access to do that for Finance so she will have the new designations entered by the end of the day Tuesday.
  - "Accept Web Gifts" and "Accept Web Pledges" indicators should be checked as well.
- ☞ Timeline and Test 3 conversion
  - Address conversion issue
    - Several addresses and telephones were kicked out during conversion. Libby is proposing two new address types for advancement conversion purposes. Once the addresses have been loaded with the conversion type, it would be phased out as an update occurs. David has been working on this and address information will be scrubbed soon for a mini-test of this.
  - Test 3 conversion is a little behind for several reasons. We may go ahead and reload general person and some of the constituent information soon with academic information and financial information to follow later.
- ☞ Training
  - The training subcommittee will try to meet following Summit.
- ☞ Next consulting session
  - 3/27-29—Self-Service
- ☞ Cashnet update
  - A consultant will be here Wednesday and Thursday. Libby hopes to have more information after that.

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## ☞ Testing results

- Full middle name not loaded—this occurred on constituents already loaded in Banner from other systems. Jerilyn will contact Sue to see if we can update the middle name when the last names match.
- County codes—this should be updated when we reload. It was not in the load list.
- EIU email addresses—these will be added under a separate load.
- Current employer as primary—no one could remember if this was correct during first load. Libby will check into it prior to next load.
- Considerations converted as \$0.01. These are listed in the tables but do not seem to be appearing in the forms. Libby will check into it.
- Memo credits—"O" memo credits were skipped. We need to determine how to handle these.
- Degree errors—the degree error reports need to be reviewed to determine what the problems might be.

## 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: