

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	April 2, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Lori Creek, Kim Harris, Cris Ealy, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Matching gifts and supplemental organizations
 - Some issues are still being researched for processing in Banner.
- ☞ Procedures documentation
 - Matching Gift Information
 - All procedures are drafted except for two scenarios. Subcommittee hopes to meet this week.
 - Premium Gifts
 - Procedures are almost complete.
 - Anonymous, in honor/memory of
 - Procedures are done.
 - Memberships
 - Procedures are done.
 - Event Management
 - Procedures will be postponed until Day 2 as event management will not be in use fully by July 1st.
 - 2nd draft
 - Procedures are still being finalized. They can be found on the repository in the "Final" folder within the "Procedure Manual" folder.
- ☞ Timeline and Test 3 conversion
 - All tables have been loaded except membership and prospect information. Membership data is being worked on and should be in later today.
 - Error reports are being prepared. Need to determine what to do with error reports—fix the errors in ADS or wait and change in Banner.
 - Testing deadlines can be extended slightly. The tables to review by April 6th are SPRIDEN, SPBPERS, SPRADDR, SPRTELE, GOREMAL. The other deadlines will be adjusted in the file on the repository.
- ☞ Security classes
 - Classes are ready to send to Cathy to set up for testing.
- ☞ Training
 - The training plans were discussed.
 - Week of April 23rd begin training Ernie as she is the only other staff member to update general person information besides team members.
 - Week of July 9th begin training query only users. Hold pre-training meetings last week of May to evaluate needs of users.
 - Week of July 16th begin training development officers on SSB.
- ☞ Reporting

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- Reporting plans are going well. Banner-supplied reports have been tested. Reports have been created with the TESTODS data. PopSels have been created.
- Need to access GLBEXTR through Crystal Reports during next consulting session with Mike.
- Need to think about reports we may want to schedule through Appworx.
- Kim picked up a CD with several scripts for extracting data from Banner while at Summit. She has given it to Libby to review for us.

☞ Duplicates

- We are going to try to have all data on the "good" record and create a log of the "bad" records with CID and name. The log is due to Libby by April 18th.

☞ Next consulting session

- 5/22-24—Go-Live Consulting
- Things to have ready, be ready to do during this consulting
 - Security set up in PPRD
 - Enter real pledges, gifts, memberships
 - Feeds to Finance
 - Demographic entries
 - Reports—running popsels and then pulling data from Crystal Reports. Need GLBEXTR table for Crystal Reports.
 - Run receipts, reminders, pledge acknowledgements
 - Determine how often to run feeds to Finance and when
 - VSE Report
 - Prospect research information
 - Need access to GUAOBS, AGAACKR, AGACTRL

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: