

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	April 9, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Lori Creek, Sandy Wheeler, Kim Harris, Libby Coffey, Cris Ealy, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

☞ Summit Review

- Kim shared brief notes from her sessions
- Cris and Jerilyn reviewed some of their notes
- Presentations of interest to team members will be put on repository for all to view

☞ Procedures documentation

- Matching Gift Information
 - The subcommittee has not met recently but is planning to meet this week.
- Premium Gifts
- 2nd draft
 - Lori sent address procedures to Tami
 - Lori has constituent about half-complete and is also working on designations
- Review of documentation-schedule time
 - Friday, April 13th from 9-10:30 am. Jerilyn will schedule a room and let everyone know

☞ Timeline and Test 3 conversion

- Review of error reports
 - SPBPERS
 - Gender: Sue has indicated that we can update the gender code for records in Banner that do not have a gender specified and Advancement has a gender code. There are also around 30 records where Banner records and Advancement records differ. Jerilyn and Sue will review to make determination.
 - Deceased: There are 9 records to review.
 - Prefixes: Sue has indicated that we can add our prefixes to Banner records currently without prefixes.
 - Birthdays: We will review with student the 154 discrepancies after loading into PROD.
 - Ethnic codes: We will keep the Banner ethnic codes.
 - Marital status: There are 563 records with differences. We will research and verify with student after the PROD load.
 - Suffixes: Our suffixes match those in Banner but the Banner ones are in all upper case. We will fix after the PROD load.
 - SPRTELE
 - We will review these later to see what needs to be fixed. Many of the ones on the error report may already be in Banner.
 - SPRADDR

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- We are working to fix as many of the address errors as possible and will fix the rest after the PROD load.
- Duplicate reports are due April 13th
- The first round of testing was due April 6th. Tables to review for this round are SPRIDEN, SPBPERs, SPRADDR, SPRTELE, GOREMAL. Other testing dues dates are on the repository.
- Go-live checklist
 - April 18th: ADS duplicate report due. If there is some data that can't be moved to the "good" records in time, the "good" records should be added to a list for not loading in Banner too.
 - April 19th: Validation, header and rule tables will be migrated from TEST to PROD. Libby asked that the activity and geo region tables be reviewed prior to the migration.
 - April 24th: ADS files will be extracted starting at 6 am. The files will be downloaded and held until approximately 2 pm. The load to PROD will begin around 5 pm and go through the evening. Error reports and duplicate reports will be provided the next day.
- ☞ Security classes
 - Cathy is setting up the classes in TEST initially. We need to provide her with users to add into TEST for us to do some testing. Team members should provide a list of users in their area to Jerilyn by Monday, April 16th, if not before. She will then have Cathy assign security to the users for the team to test.
- ☞ Reporting
 - Libby indicated that there may be some programming time available for writing Crystal Reports. Report specs should be forwarded to Jerilyn to coordinate with IT.
 - We are also going to look into the use of rePortal for sharing reports with end users.
- ☞ Next consulting session
 - 5/22-24—Go-Live Consulting

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	Item Description	Owner	Target	Status
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Identifier			Completion Date	

Attachments and/or meeting Handouts listed: