

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	April 23, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Sandy Wheeler, Tami Babbs, Kim Harris, Lori Creek, Libby Coffey, Cris Ealy, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Procedures documentation
 - Last week reviewed the rest of the constituent procedures and campaigns/designations procedures. There are a few changes to incorporate into the final document.
 - Gifts/pledges, membership and prospect management procedures are the last to finalize. Jerilyn will try to schedule a location for Thursday from 1:30-3:30 pm to review gifts/pledges documentation.
- ☞ Timeline and Test 3 conversion
 - Rest of constituent data testing was due April 20th.
 - Gifts/financial data testing is due May 4th.
 - More error reports should be provided soon.
 - Some testing errors seem to reoccur with each test load. Any general person items should be sent to Libby by the end of today.
- ☞ General Person load to PROD
 - Validation tables are being cloned to PROD. Any changes to validation tables or rule tables after this point will need to be made in TEST and PROD.
 - Constituent base tables will also be loaded as part of general person load.
 - Problems were discovered with degrees. IT is looking at these problems and will try to determine what needs to be done. They will try to fix these problems prior to the load into PROD for academic information.
 - A general person load into PPRD was done last week and everything looks good. IT will begin around 6 or 7 am on Tuesday with the extract programs. Duplicate reports and error reports will be provided Wednesday morning. The load into PROD will begin around 5 pm.
 - ADS CICS region will be closed on Tuesday. Libby will copy this region to the CICST1 region before closing the files. The test region will be available during the day on Tuesday.
 - PRODODS will be available starting Thursday.
 - New designations are ready to be entered into Banner. They will need to be entered in both TEST and PROD instances.
 - Once the data is in PROD and user access has been provided, the team will review the load and check for problems. Team members should email Jerilyn to let her know of any problems or to let her know the load is good. Once she has heard from everyone, a notice will be sent out to indicate that data entry can begin.
- ☞ Security classes

EISE Project Meeting Notes Eastern Illinois University

- Users and their assigned classes have been passed on to Cathy. She anticipates having the user roles set up by Wednesday.
- Fine grain access control
 - FGAC can be set up for various purposes. For our needs, it would be possible to set up access so particular areas would only be able to access a particular set of records. The team has been asked to put forward a recommendation regarding FGAC. Jerilyn will draft a recommendation based on team discussion today. After the team's approval, the recommendation will be sent forward.
- ☞ Reporting
 - PRODODS can be used once access is set up and the data is loaded in PROD.
- ☞ Milestones
 - Interfaces
 - Advancement to Finance—this interface seems to be working. It's been tested several times in TEST.
 - HR to Advancement—this interface will be pushed off to June for completion. We will try to test in May when Mike is here next.
 - Student to Advancement—this interface is not needed until January. This will be tested after all loads into PROD have been completed.
 - Security matrix—this is almost completed.
 - Procedures—the constituent and organization procedures are almost completed. This milestone will be divided into two as not all of the procedures are needed at the same time.
 - Final testing—the last conversion testing is being completed.
- ☞ Training
 - Kim, Cris and Jerilyn will schedule a meeting to review training again.
- ☞ 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 Identifier	Item Description	Owner	Target Completion Date	Status

**EISE Project Meeting Notes
Eastern Illinois University**

--	--	--	--	--

Attachments and/or meeting Handouts listed: