

EISE Project Meeting Notes Eastern Illinois University

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

Agenda and discussion items

- ☞ Procedures documentation
 - Pledge procedures were reviewed on Thursday, April 26th. Changes were made to the document on the repository.
 - Gift procedures will be reviewed on Friday, May 4th. Jerilyn will arrange a location and send out a meeting request.
 - Tami indicated that she is working on adding screen shots to the constituent procedures.
- ☞ Timeline and Test 3 conversion
 - Financials are the last items to test in the 3rd conversion. The due date for those has been changed to May 11th.
- ☞ General Person load to PROD
 - Duplicates created with nonperson records?
 - It is believed that some duplicates were created when some of our nonperson records were loaded. We are looking into ways to determine potential duplicates and then to address those duplicates.
 - There is a question of how to determine who is a current employee and who is a current student and what that means for our updating needs. Jerilyn will email Joy and Sue regarding the issue of updating addresses and names and how to proceed.
 - Duplicate report assignments have been distributed. These should be reviewed and returned as soon as possible to facilitate the next data load into TEST.
- ☞ AGACTRL
 - This will be discussed at the next meeting.
- ☞ Training
 - Training subcommittee meeting was scheduled for April 27th but will be rescheduled for this week. More information will be available at next meeting.
- ☞ Next consulting session
 - 5/22-24—Go-Live Consulting
 - Locations will be 9th Street Lab, Martinsville Room and Effingham Room
- ☞ Next meeting
 - Jerilyn cannot meet on Monday during regular meeting time. Another date will be determined for next week.
- ☞ SETA Midwest
 - Tami shared that she is the Advancement track chair for SETA Midwest. She will be sending out a call for presentations soon. The conference is September 25-27th.

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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: