

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	May 8, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 5012
Attendees:	Sandy Wheeler, Libby Coffey, Lori Creek, Cris Ealy, Kim Harris, Tami Babbs, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

- ☞ Procedures documentation
  - The team is met on May 4<sup>th</sup> to continue the review the gift procedures. Some address procedures were reviewed with real data to see how they worked.
  - Screen shots are being added for the constituent procedures.
- ☞ Test 3 conversion
  - Financials are due May 11<sup>th</sup>.
  - A request will be made for the CICST1 region to be available until midnight each night May 8<sup>th</sup>-May 11<sup>th</sup>.
  - We are seeing some matching gift company errors. However, we will load and then correct what needs to be corrected after the load.
- ☞ ADS gift issue
  - Libby is trying to resolve the issue with Tim Mills' record. A fix from SungardHE has been received and applied but it did not correct the problem. She is looking at other alternatives for us.
- ☞ General Person load to PROD
  - Duplicates created with nonperson records?
    - There may have been some duplicate non-person records created during our general person load. Teresa Sims from the Finance team is reviewing our records to see what she can find.
  - Duplicate reports
    - These are being worked on.
  - There are some address, phone and email errors to be looked at and possibly entered into PROD.
- ☞ Remaining constituent load to PROD
  - Working towards loading the rest of constituent data to PROD. The plan is to copy to PPRD too for the next consulting session. Financials will be loaded to PPRD too. Security from PROD should copy over to PPRD.
- ☞ SGASTDN access
  - A sample access form request was distributed. Sue Harvey has indicated that she will give us query access to this form to see if a person is a currently enrolled student or not. This will help us with address updating.
- ☞ Finance feeds
  - It was determined that a feed to Finance will be run every night when gift entry begins in Advancement.
- ☞ AGACTRL

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- Screen shots were distributed. The settings on this form will be discussed at the next team meeting.
- ☞ Accessing GLBEXTR table through Crystal Reports
  - Libby will check on accessing this table that stores PIDMs for a population selection so the PIDMs can be used to write a report in Crystal Reports.
- ☞ Training
  - Kim, Cris and Jerilyn will be meeting on Thursdays. Dates will be scheduled for training and then notices sent out to the appropriate users.
- ☞ Reporting
  - PRODODS access
    - Kim, Cris and Tami should contact Cas to arrange a time for PRODODS access.
- ☞ 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

### **Attachments and/or meeting Handouts listed:**