

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	May 14, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 5012
Attendees:	Cris Ealy, Libby Coffey, Kim Harris, Sandy Wheeler, Tami Babbs, Lori Creek, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Procedures documentation
 - Final document for constituent processing
 - This is being worked on. It is the first set of procedures that needs to be completed.
 - Final document for financials processing
 - Team will continue to review and finalize procedures after Mike is here next week.
 - Final document for prospect processing
 - Team will review and finalize these procedures after financials.
- ☞ Test 3 conversion
 - Financials are the last set of testing to be completed. Lori has completed hers. Everyone is continuing to work on the testing.
- ☞ General Person load to PROD
 - Duplicates created with nonperson records?
 - Duplicate reports
 - Most of the duplicate reports are finished. Records that are not duplicates need to be manually fixed. These will be handled prior to next PROD load of data if possible.
- ☞ Remaining constituent load to PROD
 - The following tables are ready to be loaded to PROD and to PPRD
 - AORMAST
 - AORMERQ
 - AORMPRO
 - AORMRTO
 - APRCSPS
 - APRCHLD
 - APREHIS
 - APRXREF
 - APREXCL
 - These tables need to be reviewed in more detail. They will be loaded to PPRD and the to PROD
 - APRACTY
 - APRACYR
 - APRACLS
 - APRCONF
 - APRSUBJ

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- And degree information tables.
- ☞ AGACTRL
 - Values for this control form were reviewed by the team. Some items are still in question and Mike will be consulted about those next week.
- ☞ Accessing GLBEXTR table through Crystal Reports
 - Libby is going to check on the status of this. We need to be able to access GLBEXTR through Crystal Reports for use with our population selections next week with Mike.
- ☞ Training
 - Kim, Cris and Jerilyn are working on putting together training materials. The FGAC technical training will not be done until the week of Labor Day so this may impact our training dates and when we can have access set-up for end users.
- ☞ Reporting
 - PRODODS access
 - Kim, Cris and Tami need to contact Cas to connect to PRODODS before next week's consulting session.
- ☞ Next consulting session
 - 5/22-24—Go-Live Consulting
 - Topics for discussion include:
 - Pledges, gifts and memberships including receipts, pledge reminders, feeds, membership cards/renewals/reminders, job submission, how to find a data entry error when balancing session
 - Pop sels and running the report in Crystal Reports once the list of PIDMs has been created in GLBEXTR
 - VSE report and VSE codes
 - Demographic entries
 - Applying soft credit as pledge payments

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

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Attachments and/or meeting Handouts listed: