

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	June 4, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Sandy Wheeler, Lori Creek, Cris Ealy, Kim Harris, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Procedures documentation
 - Final document for constituent processing—Tami is working on the final document. Kim had some items she found during her review of the procedures.
 - Donor categories on APACONS may not have the same order as on ADS. The priorities may have to be reviewed.
 - We need to add the “ADV” name type for non-person name changes.
 - On AOAORGN, if the type of business is known, it should be entered. Otherwise, the description for the donor code should be used.
 - Exclusion codes need to be reviewed.
 - Email preferred indicator—there is a question of how to code the preference for an email that is other than an “EIU” one if the person is not a current student or employee.
 - If a business title is known but not the employer name, Banner will not allow us to enter the business title on APAEHIS. It was determined to use the title in both the employer name field and the title field. When adding a new employer, the primary indicator should be “unchecked” on the old employer data and then “checked” for the new one.
 - When coding an old address as inactive, we need to clarify in our procedures which address types we can use: PR (if not current student/employee), ZP and LS. RF addresses should be left as is unless we know for sure it is a bad address.
- ☞ General Person load to PROD
 - Duplicates created with nonperson records?
 - Teresa Sims is reviewing our nonperson records and comparing to Finance.
- ☞ Remaining constituent load to PROD
 - Degrees/majors and activities are ready to load to PROD and will be loaded this week. Error reports will be provided too.
 - During the next team meeting we will discuss some specifics on errors in the financial loads.
- ☞ Training
 - The subcommittee is working on putting materials together.
 - Team members are encouraged to make note of any “tips and tricks” to pass along to users during training.
- ☞ Banner-supplied reports
 - The reports will be run and output from the reports will be saved to repository for everyone to review.
- ☞ Consulting evaluation forms

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- Evaluation forms should be submitted to Jerilyn for the pre-go live session with Mike. Lori, Kim and Sandy have already submitted theirs.

Milestones

- Advancement to Finance interface-milestone reached
- Security matrix-milestone reached
- Final testing of conversion data-milestone reached

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: