

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	June 11, 2007
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Lori Creek, Sandy Wheeler, Tami Babbs, Cris Ealy, Kim Harris, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

- ☞ Procedures documentation
 - Final document for constituent processing
 - Tami is reviewing items that have been added to the drafts.
 - She is creating a glossary for term definitions and will include the validation tables in this section.
 - Lori and Tami will be meeting later in the week to work on the document.
 - Kim is working on some of the gift items and has called several people she knows to ask questions. She has some changes for gift-related procedures and some changes on validation tables for premiums/planned gifts.
- ☞ General Person load to PROD
 - Duplicates created with nonperson records?
 - Teresa Sims sent Libby a file for us to review. Any determined to be duplicates will need to be addressed.
 - There are also non-duplicates from the duplicate reports that need to be separated.
- ☞ Remaining constituent load to PROD
 - Most data should be in PROD. Some items went to PPRD first.
 - Financials have been reloaded into PPRD.
 - Error reports still need to be addressed.
 - Kim found items in degree comments and with general comments (from ADS notes). She sent these items to Libby and is waiting to hear back before adding anything to the records.
 - The household indicator, salutations and combined mailing name all need to be done in PROD. Libby is working on them.
- ☞ Training
 - The subcommittee is working on a “cheat” sheet with links between ADS screens and Banner forms.
 - Tips and tricks are needed from team members.
 - Information will be sent out soon with dates and training materials.
- ☞ Banner-supplied reports
 - The Banner-supplied reports are being generated again with the output saved in a folder on the repository.
- ☞ QAS
 - Jerilyn is trying to connect with Dave Pollard regarding installation of QAS. They keep missing each other’s phone calls.

**EISE Project Meeting Notes
Eastern Illinois University**

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: