

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	June 18, 2007
Time:	1:30 pm – 3:30 pm
Place:	ITS Conference Room 5012
Attendees:	Kim Harris, Tami Babbs, Libby Coffey, Lori Creek, Cris Ealy, Sandy Wheeler, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

- ☞ Procedures documentation
  - Final document for constituent processing
  - Tami and Lori worked on procedures last week and plan to meet again this week.
  - Kim asked for clarification of the combined mailing name format.
  - Tami noted that any changes to the procedures drafts in color will be changed to black text when Tami and Lori have finished them.
- ☞ General Person load to PROD
  - Duplicates created with non-person records—a partial review has been done by Teresa Sims with the results in an Excel file. Kim volunteered to review the file to determine if there are any duplicates and to correct them as needed.
  - Non-duplicates from our duplicate reports are being worked on. They need to be completed before our financials are loaded into PROD.
  - Libby is reviewing potential duplicates with the upcoming A/R load into PROD. She is forwarding any for research to Jerilyn to address prior to that load.
  - Kim reviewed the issue with the degree comment field—the “#” symbol has been found in the comment field for some degree records loaded into PROD. Libby will look into this.
- ☞ Gift conversion Q & A
  - Libby was not ready for her gift questions. She would also like David to be present during discussion.
  - The discussion will be held during next week’s meeting.
- ☞ HR to Advancement Interface
  - Sandy will review our training materials for this interface. We need to review the process, set up the process and test in conjunction with payroll office.
- ☞ CashNet/E-Commerce site for online giving/membership dues
  - Training was held this morning.
  - The storefronts are ready to be created and tested and need to be completed by June 29<sup>th</sup>.
- ☞ Training
  - FGAC—will be utilized for certain users. Any users affected by FGAC will not receive training until FGAC is implemented.
- ☞ Banner-supplied reports
  - Most of the reports contained some aspect of giving data so the reports were created in PPRD. Team members should let Jerilyn know via email of any reports they need access to.
- ☞ ODS Reports

## **EISE Project Meeting Notes Eastern Illinois University**

● Go-live reports needed identified:

- Receipts (Cris)
- Annual fund-calling sheets and premailers (Kim)
- Geo regions (Jerilyn)
- Monthly donor reports (Jerilyn)
- Degree reports (Kim)
- Email list (Jerilyn)

☞ BU phone numbers

- Sometimes we receive business phone numbers but no address. Without an address we do not know of a good way to connect the BU phone with the employer information on APAEHIS. Kim will post a question to BALUMNI to see how other schools are handling this situation.

### **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:**