

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	June 25, 2007
Time:	10:15 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Lori Creek, Sandy Wheeler, Tami Babbs, Cris Ealy, Kim Harris, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

- ☞ Procedures documentation
  - Final document for constituent processing
  - Lori and Tami are working to combine all the drafts into one document. Lori is working on the appendix and table of contents.
  - Some pages have been consolidated to make the document simpler.
  - Academic information, employment, children, comments are next sections for finalization.
  - ALND requirements, when information is not known
    - "07" college code
    - Use current year for preferred year until date of last attendance is known from the records office
- ☞ General Person load to PROD
  - Duplicates created with nonperson records?
  - Kim is reviewing what information we received from Teresa Sims. Jerilyn asked Kim to pass any definite duplicates along to her for clean-up in Banner. The clean-up will need to be done prior to the load of financials into PROD.
- ☞ Gift conversion Q & A
  - This topic has been postponed again.
- ☞ HR to Advancement Interface
  - Sandy to review documentation to determine what needs to be done for the interface. She has a student worker to calculate the pledge amount for payroll deductions for July to December so she can create the pledges for the interface.
- ☞ CashNet/E-Commerce site for online giving/membership dues
  - Need to talk to Linda about item codes and access to maintain the site.
  - Tami will need access for reports of transactions for gifts.
- ☞ Training
  - The subcommittee continues to work on the training materials. A cross-reference sheet has been drafted. They will meet again this week.
- ☞ Banner-supplied reports
  - Kim has been looking at the reports. She has at least one that she doesn't have access to. She will provide Jerilyn a list when it is complete.
  - Other team members should review the reports for needed access.
- ☞ ODS Reports
  - Go-live reports needed
  - A list of reports was created last week. The go-live reports should be ready by the end of July.

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### **☞ Gift history load to PROD**

- A 2007 fiscal-year end schedule needs to be determined.
- Tentatively July 23<sup>rd</sup> will be scheduled for the conversion.
- David is working on adding the batch ID and receipt number in the gift comments field.

### **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:**