

**EISE Project Meeting Notes
Eastern Illinois University**

Team/Group: Cross Functional Collaboration Group

Date: 6-9-05

Time: 10:30 – Noon

Place: SSB – rm. 3057

Attendees: Thom Strohecker, Andy Anderson, Frank Kingery, Tracy Hall, Sue Harvey, Dave Bailey, Ron Mason, Jerilyn Hutson, Libby Coffey, Sandy Bingham-Porter, Vicki Phillips, Julia Abell, Dave Horsman, Joy Craft, Connie Manes, KathyReed, Bill Witsman

Note Author: Kathy Reed

Agenda and discussion items

Instance Names, Access

- Discussion/explanation of instance names, who will have access to each instance, and approvals needed for refreshing data from production
- Review of proposed order of installation of updates
- Request to change wording on spreadsheet from ‘module leaders’ to ‘process team leaders’ due to wording used on SCT documents

Spreadsheets for Assigning Security

- Sample spreadsheets discussed
- Process team leaders will work with departments to determine classes of employees; forms, processes, and type of access necessary for each class
- Process team leaders may contact counterparts at other institutions for sample security spreadsheets to avoid replication of work efforts
- Object lists available in SCT documentation for obtaining form names
- Process names available in SCT documentation for each module

ID number (not the same as PIDM)

- PIDM is internal identification number that is never seen
- Banner allows for 9-character ID; generated ID has character prefix followed by 8 digits
- Discussion concerning the assignment of a random number prior to loading General Person in Banner
- **Mention in Finance training of use of blocks of numbers by each module; ITS will raise the issue at General Technical training June 20-22**
- **No decisions can be made till issue is clarified**

General Person – when and who to load

- Three possible options:
 - Load persons for each module at module implementation time
 - Load all persons with implementation of Finance
 - Load all persons, except Alumni, with implementation of Finance
- Discussion of possible advantages, disadvantages of mass loading
- **Need to obtain information from institutions that have experienced loading all at one time**

**EISE Project Meeting Notes
Eastern Illinois University**

Banner User Names

- Suggested username: First initial, Middle initial, Last name (no spaces)
- If duplicate name, digit will be added at end of username
- Discussion resulted in consensus to utilize the suggested username

Finance and/or Accts. Receivable and/or Position Control and/or Budget

- Finance team no longer interested in implementing Student Accounts Receivable with Finance
- Finance team needs to further investigate the role of Position Control with Finance

Regular meeting schedule

- Consensus to meet on second and fourth Monday of each month, 2:00, in available room in MLK union

Decisions Made

- Banner usernames will consist of First Initial, Middle Initial, Last Name
- Duplicate usernames will have a digit added to the end
- People without a middle name will have a username of First Initial, Last Name

Decisions for referral

Tabled/Future discussion Items

- Mass loading of General Person
- Assignment of ID numbers
- Finance and Position Control implementation

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
	Post question concerning mass load of general person to BGeneral list	Connie Manes	6/13/05	Completed 6/9/05
	Email Laurene from SCT for names of universities that did a mass load of General Person	Kathy Reed	6/13/05	Completed 6/9/05

**EISE Project Meeting Notes
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	Obtain information on the assignment of ID – are there blocks of numbers for each module? If random numbers are previously assigned, will they be skipped when future numbers are generated? Does a prefix have to be assigned?	Kathy Reed	6/27/05	
	Reserve union rooms for future meetings	Kathy Reed	6/27/05	Completed 6/9/05
	Investigate use of Position Control with Finance	Dave Horsman (Larry Cannon)	6/27/05	

Attachments and/or meeting Handouts listed:

Email Attachments: Banner Database Instances
Spreadsheets for Banner FA Security