

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

Team/Group: Cross Functional Collaboration Group

Date: 8-22-05

Time: 2:00 – 3:45

Place: MLK – Arcola-Tuscola

Attendees: Larry Cannon, Julia Abell, Jerilyn Hutson, Libby Coffey, Sandy Bowman, Thom Strohecker, Connie Manes, Frank Kingery, Vicki Phillips, Andy Anderson, Ron Mason, Jone Zieren, Joy Craft, Sue Harvey

Note Author: Vicki Phillips, Kathy Reed

**Agenda and discussion items**

**Team Updates**

- **Finance** – Year-end completed and back to working on Banner project. Larry Cackler almost approved the chart of accounts – thought program code was too complex, but no ideas for improvement. They are attempting to get assignments completed for consulting. Need to have a meeting next week and get more people involved.
- **HR** – Completed 2<sup>nd</sup> round of training last week. Large portion of work done on defining the Employee Class Table and work has begun on the position class table. Received reports on data to cleanup for conversion.
- **Training** – The EISE Calendar has been updated and is being kept current with training and meetings related to Banner. Anyone with a meeting should forward that information to Sandy Bowman to be added to the calendar.
- **Financial Aid** – Continue to work on BPAs.
- **Student** – Three BPA teams working currently. Received the 1<sup>st</sup> of 4 lists from Libby to begin data cleansing.
- **Advancement** – No meetings since last CFCG meeting due to schedule conflicts, will continue to work on BPA
- **Data Standards** – Almost finished with standards for names and started on standardizing addresses. Sue Harvey has joined their team and Tracy Hall has been temporarily replaced by Patti Bailey.

**Name Types**

- SSN name needed for tax reasons, will be stored in appropriate SSN name field.
- Student needs a diploma name, further research needs to be completed before determining if it needs to be a name type
- Former/previous name needs to be available, cannot be loaded from HR legacy system, may be available from Alumni legacy system.
- Maiden name needs to be a name type and may be available for conversion from legacy systems.
- Preferred name needs to be a name type, is currently available only on Alumni legacy system.

**EISE Project Meeting Notes  
Eastern Illinois University**

- It was determined parent/guardian name would be available as emergency contact, so no need to store as a name type.
- Directory name not needed as a name type.
- Data standards team will be notified of recommended name types from CFCG.

**Address Types**

- Discussion included a need for local (both on and off campus), permanent, mailing (same as billing), and reference
- Alumni additionally uses a seasonal address
- Availability of a work/employer address within Banner needs to be researched before determining if an employer address type is necessary

**Decisions Made**

- **HR** – Conversion of legacy data will include active employees and those terminated within the previous year.
- **Data Standards** – Legal name field will be an optional field. No one saw a need for its use. It will not be populated during conversion.
- **Name Types Needed**
  - Former/previous name
  - Maiden name
  - Preferred name
  - Diploma name (if not available as a separate field)

**Decisions for referral**

**Tabled/Future discussion Items**

Accounts Payable – processing student checks, student loans dependent upon conversion of students to Banner

Address Types – complete research to finish determination of types needed

**Ongoing Task List , Action Items**

Item Identifier	Item Description	Owner	Target Completion Date	Status
AICF001	Investigate use of Position Control with Finance	Larry Cannon		
AICF004	Determine types of names and types of addresses necessary for module	Process Team Leaders	9/26/05	

**New Action Items**

Item	Item Description	Owner	Target	Status

**EISE Project Meeting Notes  
Eastern Illinois University**

Identifier			Completion Date	
AICF005	Banner Finance accts payable processing loan and billing for students. Need decision on whether to leave FRS up with interface to move data bach and forth or to convert students when Finance implements	Larry Cannon		

**Attachments and/or meeting Handouts listed:**