

**EISE Project Meeting Notes
Eastern Illinois University**

Team/Group: Cross Functional Collaboration Group

Date: 9-12-05

Time: 2:00 – 3:20

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, Tracy Hall

Note Author: Vicki Phillips, Kathy Reed

Agenda and discussion items

Team Updates

• **Finance**

- 3-day session for Purchasing, Accounts Payable, and Bank Rec. last week, didn't have time to cover Bank Reconciliation
- Purchasing is going to create all vendors new in Banner rather than migrate – training last week confirmed as a good idea. Need to send user security information for pre-prod instance to Cathy Ashmore.
- Planning fiscal agent user training (approximately 300) for end of March and beginning of April on Banner. Looking into using Banner Self Serve, to allow users to view only their data.
- Finance needs to consult with SCT and steering committee if training is to be on self-service. Consulting for self-service scheduled for late March, 2006 – not enough time to create end user training program/materials.
- Chart of Accounts skeleton up with type codes structure in place. Next step will be to add organizations with a goal to be significantly done in three weeks. Discussion included use of data standards that are available.

• **HR**

- Employee class table finished (30 classes) - will be revisited as other tables are built. Position class table has a few entries and Salary class and Benefit class have begun entry also.
- Training for benefits deductions next week, preparing questions before it begins.

• **Training**

- Looking for facility for training moved to October 11, 12, 13
- Looking into a laptop cart with 24 or 30 laptops for use at the Union to alleviate problems with finding available training rooms.
- Need a list of attendees who have attended training, can be obtained from trip reports

• **Financial Aid**

- Will discuss data cleansing Wednesday this week

• **Student**

- Friday - Student Team will be having a team building activity
- Team meetings will begin September 21st

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- Southern supplied a basic matrix for security. Asking the team to have this filled in by 30th
- Data cleansing list has been pared down and will look at again.
- **Advancement**
 - Name Types and address types completed
 - Working on BPAs
 - Making a lot of progress on data cleansing.
- **Data Standards**
 - Signed off on first twelve pages of the Data Standards document. Names are finished and almost finished standardizing addresses.
 - Decided Data Custodians for each group will remain as they currently are, just made official. Sue Harvey will coordinate a meeting for this group to document procedures.

General Person Migration

- Initial load of SPRIDEN will be ready for December of this year in CONV (conversion) instance.
- This will allow us to see how it looks and reload as many times as necessary.
- The actual conversion will take place April/May 2006 into PPRD (pre-production) instance.
- PPRD will be used to verify information
- Finance should build vendors, validation tables, and COA in PPRD (recommendation of SCT consultant)
- Finance should not enter student or employee 'vendors' (recommendation of SCT consultant)
- Once PPRD is verified, conversion will take place in PROD (production) instance.
- Recommended that once PROD is loaded, names and ID changes be done manually in both Banner and mainframe. No scripts to be written to move things back and forth.
- Conversion of addresses planned for October 2006. From then until HR is live, (Nov-Dec, 2006) employee address changes would need to be done in both mainframe and Banner.
- Until March/April of 2007 either dual entry or scripts will be necessary for student addresses.
- Initial conversion of General Person will populate the name and SSN fields, yet to determine if additional data, such as gender, birth date will be included in the initial conversion.
- Libby explained the loading of Banner from the legacy AAfile with handout illustrating the planned process.

Conversion/Go-live

- Admissions go-live mid-July 2006 to accept Fall of 2007 applicants
- Decision needed on purchasing Darwin early for prerequisite checking. Jeff Cross and others will be making this decision.

Decisions Made

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- **Data Standards** – Name types have been confirmed and going forward.

Decisions for referral

Tabled/Future discussion Items

Address Types

Address types to include SCT required values (MA-mailing, BI-billing, PA-parents/permanent, BU-business, XX-accounting feed)

Additional types specific to EIU will be: RE - special refund to be used during conversion for Finance to process student/employee refunds, SE –seasonal address (advancement) and RF for reference (advancement uses to indicate an individual who will know an accurate address for the constituent)

HR requests a type of PR for permanent (employees don't use parents' addresses)

Relationships – types needed

Ongoing Task List , Action Items

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

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed:

Banner AAfile Load