

EISE Project Meeting Notes
Eastern Illinois University

Team/Group: Cross Functional Collaboration Group

Date: September 26, 2005

Time: 2:00 p.m.

Place: Arcola-Tuscola Room

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

Note Author: Libby Coffey

Agenda and discussion items

Bill Witsman (added to the agenda) discussed training and procedure documentation -

The consensus of the group is that a 'look and feel' could be designed at this time, but it is too early to write training and procedural documentation

Process Team Updates

Advancement

- The Development team had a banner demo.
- Continuing with Business Process Analysis

Financial Aid

- Decided September 14th to migrate 10 years out, removing those students who did not attend.
- BPA – Packaging
- Summer term – a discussion on how summer term will work in Banner

Student

- Data Migration – they discussed in their meeting where to pull from and how to do this.
- They will keep everyone since Summer 1992. (When Oars went live) using either Student Master or Student basic
- Mark Hudson indicated to Sue that they will be keeping Cbord

HR

- Benefits and deduction training has finished
- Pclass table & many questions were answered during training
- They requested from their consultants: One section in position class table is unavailable. EIU would like to use this screen (category code) – their consultant will look at it
- Would like to create documentation for creating or modifying a table – have asked for a license for Adobe Acrobat
- Some training sessions were not scheduled: FMLA, seniority - don't have POPSEL scheduled, but were told by their consultant that most HR groups sit in on another group's POPSEL training

Training

No report

Data Standards

- Continuing to work on document
- Working on telephone types

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Finance

- Minutes are up to date on EISE web site
- Schedule of sessions has been changing
- Chart of accounts
 - They expect to have the spreadsheets done for chart of accounts by Friday
 - Would like Connie to have them migrated into Banner early next week – ITS has had no experience with migration and most likely, it will take a longer timeframe
 - Larry wants the COA placed in TEST instance

Data Cleansing – review of progress

- Sandy (HR) – Fiscal Year 05 forward – names/addresses – no contractual data will be going in
- Dave B – Finaid – 10 years back – applied for finaid or admitted
- Jerilyn – working on it

Name, Address Types – name types previously determined

Address types approved:

- MA – mailing (required by SCT)
- BI – billing (required by SCT)
- PA-parents (required by SCT)
- BU – business (required by SCT)
- XX – accounting feed (required by SCT)
- RE – special refund to be used during phased implementation when Finance is live, but Student is not
- SE – seasonal address for Advancement
- RF – reference for Advancement
- PR – permanent (HR requested)

Telephone Types –Data Standards team has asked CFCG to determine. (*STVTELE*)

3 telephone codes that exist without being associated to an address. (general, fax, cell)

Other telephone validation codes are associated with an address type

Types under consideration are:

- Billing
- Business or work
- Emergency contact
- Corporate headquarters
- Mailing
- Matching gift
- Parent/guardian 1
- Parent/guardian 2
- Permanent
- Seasonal
- reference

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Relation Types – (STVRELT) Data standards has asked CFCG to determine Codes used by ADS and under consideration:

- XXXX Unknown
- EXSP Ex-Spouse
- SPOU spouse
- FRND friend
- PRNT parent
- SCHL school contact
- CHLD child
- SIBL sibling
- GRPA grandparent
- GRCH grandchild
- PTNR Partner
- STPT Step Parent
- STPC step child
- WDSP Deceased spouse
- OWNR Owner
- BORD Board of Director
- OFCR Officer
- EMPL Employee

Self-Service Address – Data Standards is deferring to CFCG to determine the use of self-service addresses and who will validate them
Discussion on availability of selected areas of self-service and logging or verification of changes – additional research is needed

Decisions Made

Address Types:

- MA – mailing (required by SCT)
- BI – billing (required by SCT)
- PA-parents (required by SCT)
- BU – business (required by SCT)
- XX – accounting feed (required by SCT)
- RE – special refund to be used during phased implementation when Finance is live, but student is not
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Decisions for referral

Tabled/Future discussion Items

Address Source Codes – Data Standards team has asked CFCG to determine. (STVASRC)
No time for discussion

Legacy Codes – Data Standards team has asked CFCG to determine

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No time for discussion

Common Matching – recommended for each member to read – all modules have it available in the users guide and release guide

Ongoing Task List , Action Items

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

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed: