

EISE Project Meeting Notes Eastern Illinois University

Team/Group: Cross Functional Collaboration Group

Date: 10-24-05

Time: 2:00 – 3:30

Place: MLK – Arcola-Tuscola Room

Attendees: Jerilyn Hutson, Libby Coffey, Larry Cannon, Thom Strohecker, Andy Anderson, Jone Zieren, Joy Craft, Sue Harvey, Sandy Bowman, Connie Manes, Dave Bailey, Julia Abell

Note Author: Kathy Reed

Agenda and discussion items

Team Updates

- **Advancement** – No updates to report.
- **Financial Aid** – Held BPA workshop Oct 11, two more are scheduled. Gathering information from University of Illinois, particularly for MAP awards. Reviewing Banner questions and answers, listservs.
- **Student** – Working on BPAs. Student Overview session scheduled for week of Nov. 14th. Have some issues with the latest education schedule we just received from SCT.
- **HR** – Not meeting again until December due to having four training sessions within the next five weeks.
- **Training** – Used laptops in the Union last week for HR training session. Need to show consultants how to use the equipment in the Union. Bill Witsman has received bids on laptop cart. The latest SCT education schedule still has two sessions scheduled during finals week.
- **Finance** – Nov. 8-10 consulting – testing of general revenue, income fund account process; Nov. 15-17 Interfaces, Uploads – Had Security and Rules training 2 weeks ago. Last week was data mapping – went extremely well. Loaded COA, lots of clean up left to do. Connie Manes got experience on Ctool. Attempted to load beginning balances based on crosswalk, it failed for good reasons. Selection criteria needs to be determined for creation of vendors. Have goal of being ready to train the university by 4/1/06.
- **Data Standards** – No meeting this week. In meeting last week, moved some items to CFCG, are very close to the finish of the first draft, working on the appendix.
- **Report Standards** – Will have first meeting this week.

Data Cleansing

- Student area will be meeting next week.
- Encountering more than one name for an individual between Student Basic Master and AAfile (FAMS, BR). Need to determine which is more reliable; 1855 names to examine.

Telephone Types

- Reviewed and agreed to telephone types – will use types that match address types with some additions:
 - MA – mailing (required by SCT)
 - BI – billing (required by SCT)

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PA-parents (required by SCT)
BU – business (required by SCT)
SE – seasonal address for Advancement
RF – reference for Advancement
PR – permanent (HR requested)
HQ – corporate headquarters
MG – matching gift
P1-P4 for parents

- Will also have GEN, CELL, and FAX that will not be tied to an address type
- HR trainer stated we may have trouble getting to telephones without a matching address type

Email Types

- Business Office had requested P1 and P2 email types for emailing of bills to parents.
- To be consistent with other address types, the addition of P1 through P4 was approved

Student Addresses

- Discussion concerning Student Accounts as office responsible for maintaining student addresses rather than Housing
- Consensus is the decision needs to come from Data Custodians, not CFCG
- Sue Harvey will discuss with Mark Hudson

Employee Veteran's Information

- Data Standards had asked CFCG to determine if maintenance of employee veteran's information should be moved from Civil Rights to HR
- Joy Craft will discuss with Civil Rights and make the determination

Ethnicity

- Data Standards had asked for decision whether PEBs should be expanded beyond IPEDS
- Consensus is to use current PEB codes without international

Citizenship

- Data Standards had asked if it should be simple Yes or No or do we include Resident Alien?
- Joy Craft will have Carol Galey inform Nina Milliner who can relay the info to Data Standards

Legacy Codes

- Review of the legacy codes available on Banner training instance
- Consensus to use delivered values with following changes:
 - Add Daughter
 - Add Son
 - Add Grandmother
 - Add Grandfather
 - Delete Grandparent

Relation Codes

- Review of the relation codes available on Banner training instance
- Consensus to use delivered values

Self-Service Addresses

- Discussion concerning which address types students will be allowed to update via self-service

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- Decision deferred to Data Custodians

Miscellaneous Items:

Banner test instance will be unavailable Thursday and Friday – it will be cloned from pre-prod instance, resulting in removal of previous test and seed data.

Next CFCG meeting is scheduled for Nov. 14th, 2:00 p.m. in the Arcola-Tuscola room.

Decisions for referral

Tabled/Future discussion Items

Address Source Codes
Common Matching

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	
AICF005	Decision on which name is correct between the AA file and the Student Basic File	Libby and Kathy	10/24/2005	Reports given to Student Data Cleansing 10/24/2005

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed: