

EISE Project Meeting Notes
Eastern Illinois University

Team/Group: Cross Functional Collaboration Group

Date: 11-28-05

Time: 2:00 – 3:45

Place: MLK – Arcola/Tuscola Room

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

Note Author: Vicki Phillips, Kathy Reed

Agenda and discussion items

Team Updates

- **Advancement** – Continuing to work on data cleansing. Holding monthly team meetings.
- **Financial Aid** – Nothing new, continuing on BPAs.
- **Student** – Student Banner Training Kickoff was November 15th – 17th. Starting to talk about building tables and have been tasked with building general person.
- **HR** – Training was cancelled for the first week of Dec. Work on conversion programs has begun. Outstanding questions are preventing further entry on validation tables. There is confusion on the priority lists provided by SCT. HR is going forward using the User Guide Table Priority list.
- **Training** – HR keeping Booth lab even though training is cancelled. HR training staff will not be training the campus on Banner. They will coordinate selecting subject matter experts in areas who will handle the training. They will help these people become trainers and coordinate their training and documentation. The expectation is to have most training via the web rather than classroom.
- **Finance** – Vendor cleanup going very well, getting close. Expecting a follow up to conversion session December 6th thru 8th.
- **Data Standards** – Met Wednesday before Thanksgiving. Responses to the documentation were discussed. The final document will be wordsmithed before December 7th.
- **Reporting Standards** – Regrouped tasks. Will be meeting regularly on Thursdays.
- **Data Custodians/Security** – Sent a report forward to Data Standards for incorporation into the data standards document. Meeting as needed. Working on security spreadsheets and job classifications.

Citizenship Codes – Question posed on whether to load citizenship codes for general person during initial ‘big bang’ load. Consensus to bring it forward if possible.

Marital Status – Question posed on whether to load marital status for general person during initial ‘big bang’ load. Consensus not to load marital status, they are subject to change frequently.

Names – Libby resending compiled responses on names.

Address Source Codes – STVASRC – Discussion on what to code as sources for address changes. Suggestions included: Alumni finder, phonathon (PHON), phone call (CALL), email,

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personal contact or self reported by individual (SELF), post office change (POST), information from relative (INFR), electronic data interchange or tape load (EDI), web (WEB), possible outside agency, and gift documentation.

Jerilyn will check to determine if there is a need to separate outside agencies from alumni finder.

Bill Witsman requested meeting with team leads at end of CFCG meeting– topics discussed:

Banner Instance Availability – basic hours of Banner availability is noon-midnight each day. Midnight – noon reserved for ITS, except during training sessions. Prior notification of planned down times will be emailed to team leaders. Notification of resumption of availability will be emailed to all process team members (Bill Witsman will provide Kathy with addresses). Kathy will document hours of availability and notification process.

SCT Silver Level Maintenance – EIU is encouraged to designate 2 primary representatives for each of the 5 modules (one technical and one functional) and one overall client contact for organization.

SCT conference – discussion of limited number of attendees, no decision made

ODS – software purchased from last year’s funds, have not signed services contract. Bill has asked SCT to give us help determining when to start it. Finance is not interested in warehouse.

Future meetings with team leads – Bill will meet with team leads at 3:15 after the first CFCG meeting each month

Homework

- Review Common Matching documentation from the User Guide. Next meeting will include a discussion of this topic for EIU.
- Review Names as provided by Libby.

Decisions for referral

Tabled/Future discussion Items

Alumni Names – Previously a name was allotted for alumni use. Discussion about alumni being able to change names on anyone who is not a current student or current employee. Has been discussed at data standards also. Will leave this discussion for future meetings.

Ongoing Task List , Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

New Action Items

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Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed: