

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

Team/Group: Cross Functional Collaboration Group

Date: 1-9-06

Time: 2:00 – 4:15

Place: MLK – Arcola-Tuscola Room

Attendees: Jone Zieren, Jerilyn Hutson, Tracy Hall, Joy Craft, Sue Harvey, Larry Cannon, Sandy Bowman, Connie Manes, Andy Anderson, Frank Kingery, Sandy Bingham-Porter, Libby Coffey, Kathy Reed

Note Author: Kathy Reed

**Agenda and discussion items**

**Team Updates**

- **Advancement**
- **Financial Aid**
  - Tracy Hall has returned to work
  - All scheduled BPAs have been completed
- **Student**
  - Consulting this week for location management, faculty load, catalog, and class schedule
  - Working on purchase of Darwin and associated training, consulting
- **HR**
  - HR was off for the holidays
  - May start testing Jan. 19<sup>th</sup>, 20<sup>th</sup> if a facility is available
  - Next training is scheduled for week of Jan. 23<sup>rd</sup> – the scheduled SCT consultant is Harwood, new to EIU
  - **Achieved their 1<sup>st</sup> milestone last Thursday – completion of the PCLASS table**
- **Training.**
  - Meet with Finance team on Tuesday
  - Have presentation (5-10 min.) to explain broad view of training
  - Will present at next CFCG meeting (1/23/06)
- **Finance**
  - Working on security – through profiles, now on approvals
  - Next week – fixed assets workshop
  - Finance training subcommittee will have first meeting 1/10/06
  - Work on interfaces continues – ITS waiting on crosswalks
  - Revising crosswalk – adding 25 new FRS accounts
  - Module is 3 weeks behind schedule
  - Everything is taking longer than expected
- **Data Standards**
  - No update
- **Reporting Standards**
  - Meeting every Thursday
  - Working on items for document

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- Will survey campus for reporting needs (deans, directors, chairs)
- Defining official and unofficial report, layout of official and unofficial reports
- Larry Cannon is communicating with Evisions – laser check printing product and product for forms – also have a report writer (Argos) for 5 years
- **Data Custodians**
  - Email list of validation tables that need ownership determined now to Sue Harvey

**Addresses to be converted to Banner**

- Student team is currently discussing which addresses to migrate to Banner
- Permanent address type – available in student master and student basic
- Other types to consider are local and parent/guardian/spouse
- Student employee checks may need a good address
- The period between the go-live of Student Payroll (November, 2006) and the go-live of Financial Aid (March, 2007) will require duplicate data entry
- Permanent addresses – consensus to move from student basic and student master
- Parent/guardian/spouse – consideration will be given to move it into the emergency contact area
- Local address – migration depends upon the need of student payroll – Joy Craft will discuss with Payroll

**Data custodians for unclaimed tables/data – health services, facilities planning, housing**

- Data will be treated as it currently is, data custodians will continue to be the staff currently responsible within those areas

**EIU data in test instance – deadline for verification, use of EIU data**

- EIU data in the test instance will continue to be re-loaded until consensus of accurate loading of SPRIDEN
- Until that time, if EIU data is used for test cases, it will be lost when EIU data is reloaded – team members should use fictitious persons

**Timeline for Pre-prod/Production Banner**

- Gantt chart depicting tasks, timeframes necessary to prepare the pre-prod, production, and ‘EIU Training’ instances and load them with person/vendor data was distributed
- Key dates in the chart: completion of loading spriden/vendor data in test instance – 2/6/06, upgrade of all instances – 2/17/06, validation tables and spriden/vendor data loaded to PPRD and PROD 3/8/06, creation of EIU training instance – 3/20/06
- Process teams should review converted data in SPRIDEN, SPBPERS and email problems to Libby Coffey
- Larry stated the timeframe is too long to meet the Finance team’s needs
- Discussion did not result in elimination of any tasks or decreasing the timeframe
- Suggestion of hiring extra help to complete data entry necessary for Finance
- Kathy will work with ITS staff to review the timing of the tasks for any changes that could be made

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- Each team leader should review the tasks and timeframes for any changes necessary due to their schedules or possible to reduce the timeframe

**Team Leaders with Bill**

- All EIU staff should copy Bill Witsman and Mike Delaney on all communications with SCT consultants
- For reporting purposes, Bill wants an electronic listing of the schedule/milestones from each team lead – can use the milestones being used for bonuses
- SCT requests everyone to subscribe to BANNOUNCE
- ODS
  - Getting contract for consulting
  - Most likely will not be used for Finance, probably implement with HR or shortly after it goes production
  - Views are available on the repository in CFCG/ODSSCT
  - EIU has purchased the default set of elements
  - Bill will talk to other schools to obtain the demand and payback ODS put on them
- Email Bill 2-1/2 weeks prior to training if we haven't had contact from SCT
- Bill will get team leads signature authority for bonus purposes
- Larry volunteered to tie out expenditures to PESO report

**Decisions for referral**

**Tabled/Future discussion Items**

**Alumni Names** – is an additional name type needed?

**Common Matching**

**Ongoing Task List , Action Items**

Item Identifier	Item Description	Owner	Target Completion Date	Status

**New Action Items**

Item Identifier	Item Description	Owner	Target Completion Date	Status

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