

EISE Project Meeting Notes
Eastern Illinois University

Team/Group: Cross Functional Collaboration Group

Date: 2-13-06

Time: 2:00 – 4:30

Place: MLK – Arcola-Tuscola Room

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

Note Author: Vicki Phillips, Kathy Reed

Agenda and discussion items

Team Updates

- **Advancement**
 - Topics of discussion at process team meeting included: common matching, data cleansing, security classes, and Crystal reports training
- **Financial Aid**
 - Process team discussed common matching
 - Kickoff (non-SCT) scheduled for week before Spring Break
- **Student**
 - Student tech training last week, Admissions/Recruiting workshop next week
 - Will be meeting to discuss common matching and validation tables
- **HR**
 - Received numerous assignments from last consulting session – next session scheduled for week of March 27
- **Training.**
 - No report
- **Finance**
 - Creating a campus training group, SCT training for self-service module in March
 - Fixed Assets training did not go well, it will be rescheduled
 - Working on security and approvals, have encountered problems with NSF approvals
 - Will use FEIN for common matching in Finance
 - Review of Evisions solutions – Intellecheck will be purchased to print AP checks, requisitions, purchase orders, and bids will be printed by ITS Operations
- **Data Standards**
 - No change, Julia asked Bill W. to check with Doug Bower
- **Reporting Standards**
 - Met last week, working on document
 - Questionnaire results due by Monday, will look at the results next week
- **Data Custodians**
 - Met last Friday, discussed security form, alternate IDs, and printing ID numbers on Panther Card. Determination has been deferred to Joe Barron

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- Discussed having Institutional Planning act as data custodian for general shared tables – CFCG agreed.
- **Tim Zgonina** – collecting information on Banner for inclusion in Link-n-LAN, information will be shared with External Relations
- **Term/Year Descriptions and Designations** – will be a combination of calendar year with 10 for Spring, 30 for Summer, and 60 for Fall
- **FGAC**
 - Student tech trainer recommended use in Student module first
 - Should wait six months before implementing, must know the tables very well
 - Recommended extra consulting session for the topic
- **Addresses to be converted to Banner**
 - HR needs a W2 address type
 - An address for employees will need to be available in Banner July 1 for travel vouchers
 - student employees will need legal addresses
 - Housing Office will maintain on-campus addresses for students, Registrar for off-campus addresses
- **Alumni Names**
 - Add name type of ADV for Advancement
- **Maintenance of Names/SSN**
 - Verification of employees, students, vendors must occur after big bang process Feb. 27th
 - Name changes and SSN changes after that time must be entered in both legacy and Banner (Test, Production, and EIU training)
 - New employees and students will be added from mainframe to Banner on nightly basis
 - Email names of employees who will be performing verification to Kathy Reed, she will work with Cathy Ashmore to have security assigned
- **Verification of Spriden** –
 - Everyone verified data had been examined with positive results
 - Email will be sent out to start verification after big bang has completed
- **FAQs for Modules**
 - EISE site has FAQ
 - Need separate area for each module
 - Start planning content for each module
- **Time-out on Self-Service**
 - All modules share the same timeout setting
 - Delivered value was 5 minutes, it has been reset to 15 minutes.
 - Will be reconsidered at future date as more modules utilize self-service

Team Leads with Bill

- People attending Summit need to make their own reservations for the shuttle from Orlando airport to the hotel
- FAQ/Glossary – need a clearinghouse for FAQ and Glossary to insure information is the right interpretation/definition for all modules; need a functional and technical perform from each module

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- OT/Stipends – send spreadsheets to Bill rather than Larry
- Interfaces with outside vendors – Bill wants to take a list of the interfaces, including direction of information flow and frequency of interface to SCT for possible services
- SCT has new vice president for technical services – Bill Herman; Scot Winkler will be working with him
- Steering Committee had suggested possibility of on-site consultant, SCT quoted price of \$250K

Decisions for referral

Tabled/Future discussion Items

Common Matching

Appworx – demo Feb. 27

Ongoing Task List , Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
AICF006	Obtain name types from other institutions	Team Leaders	2/13/06	Completed 2/13/06
AICF007	Discuss common matching usage with process teams	Team Leaders	2/27/06	

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed: