

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

Team/Group: Cross Functional Collaboration Group

Date: 08-14-06

Time: 2:00 – 3:00

Place: MLK – Martinsville Room

Attendees: Larry Cannon, Sue Harvey, Sandy Bingham-Porter, Connie Manes, Andy Anderson, Jerilyn Hutson, Dave Bailey, Thom Strohecker, Vicki Phillips, Sandy Bowman, Tracy Hall, Julia Abell, Joy Craft, Libby Coffey, Kathy Reed

Note Author: Vicki Phillips, Kathy Reed

**Agenda and discussion items**

Team Updates

- **Advancement** – Entering validation tables in TEST, checking records to see if they already exist in Banner. Data mapping session this week; constituent consulting next week
- **Financial Aid** – Set milestone for requirements tracking of Sept. 1, building validation tables by Sept. 1. Verification subcommittee is meeting 3 times weekly; Fund base table to be done this week and packaging preliminary testing to be done this week.
- **Student** – Training council of chairs – 8/25, departmental schedulers – 9/18 – 4 initial sessions. Two tech changes have been given to Witsman, another one to follow. Follow-up training sessions scheduled for this week. Two change requests have been submitted this week to Bill. Another is in the works. Request a presentation by Greg DeYoung on the portal and how it is going to work with Self Service Banner. Kathy will ask for this at ITS Managers meeting tomorrow morning. “Connect with Students” is team motto.
- **HR** – Training last week. Estimating 4 weeks behind in testing. EIU has more e-classes and rules than other schools. Went to U of I for seniority info (U of I basically created seniority portion) – the information EIU received from the Sungard consultant was incorrect, having to self-train. In process of scheduling more testing time.
- **Training** – Rooms are scheduled for training sessions through December. Will be using rooms in the Union after this week as Old Main rooms will be needed for classes. Need to know how many people and how many laptops because they will most likely be carrying the laptops in a suitcase to the union each day – there is no place in the union to store the laptop cart.
- **Finance** – Final consulting session (budget development) was last week. Implementing now, plan on rolling in personnel services in January. Preparing advanced training classes. On Wednesday, closing FRS for yearend, then rolling fixed assets and beginning balances into Banner Finance. Reminder to Finance team they now need to work on rolling mainframe data off the mainframe onto other storage and means of access. Banner Finance year-end training next February.
- **Data Standards** – Met this morning, nearing completion. Meet again on August 28<sup>th</sup>.
- **Reporting Standards** – no communications since the end of May, will be discussed at Steering Committee. This item will be removed from future CFCG agendas.
- **Data Custodians/Security** – no meeting last week.

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**QAS Purchase** – Purchase was completed, wrong version was delivered (Windows instead of Linux). Company contacted for correct version.

**FGAC Webinar** – Only tech people and Advancement interested in webinar, no response from other teams.

**Common Matching** – Due to already encountering ‘duplicate pidm’ problems, need for common matching implementation apparent. The Student Process team feels all teams should use Common Matching. Team leads should email Kathy Reed by noon, Friday, Aug. 25 with names of people who have access to ‘IDEN’ forms and rule that should be used for each. The first rule will be SSN and Last name (Banner requires last name).

**Argos** - Finance has 18 people signed up for Argos training session in Sept/Oct.

**Oracle Upgrade** – upgrade dates:

9/25 – SEED

9/27 – DEVL

10/2 – TRNG

10/6 – EIUTRNG

10/9 – TEST

10/9-10/11 – PPRD, CONV

10/14 – 10/15 - PROD

**Banner 7.3 Upgrade** - ITS is scheduled to begin the process this week. After the first upgrade is completed on SEED, we will have a better estimate of the length of time required for the process. Plan is to install all patches for 7.3 up to the date the upgrade is downloaded – that date is August 14<sup>th</sup>. After SEED, DEVL will be installed, ITS staff will test. If no problems, will be installed on TEST, implementation teams should test. When team leads sign off, will then be installed on remaining instances. Team leads/implementation teams need to read the release guides for 7.3, particularly for common matching. Training materials/processes may be affected.

**Information Loaded to Test** - Previous names, marital status, non-EIU information has been loaded to the TEST instance. ITS is waiting for feedback from functional people. Previous names will be moved to PROD instance 8/28.

**Accounts Receivable** – Discussed establishment of a separate group for implementation of accounts receivable portion of Banner Student. Finance would like to see more Finance people involved in addition to Linda Coffey.

**Decisions for referral**

**Tabled/Future discussion Items**

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**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

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