

EISE Project Meeting Notes Eastern Illinois University

Team/Group: Cross Functional Collaboration Group

Date: 10-09-06

Time: 2:00 – 3:30

Place: MLK – Sullivan Room

Attendees: Jerilyn Hutson, Thom Strohecker, Jone Zieren, Larry Cannon, Julia Abell, Bill Witsman, Libby Coffey, Dave Bailey, Joy Craft, Sue Harvey, Cathy Ashmore, Kathy Reed

Note Author: Kathy Reed

Agenda and discussion items

Team Updates

- **Advancement** – Advanced gift and pledge processing consulting last week. Have to determine rules, working on testing plans. Three dates have been designated for the team to test together in one location. The first conversion to test is almost completed – there will be three test conversions.
- **Financial Aid** – Team meeting last week, trying to wrap things up. Loan process, origination consulting this week, two day remote tech session next week.
- **Student** – Two day academic history consulting last week. Pop sel and letter generation next week. DARS – transfer articulation staff are completing additional DARS training via the web
- **HR** – Jobs have been entered in production, are in verification and cleanup phase. Waiting for action line responses. When PROD goes down this weekend (Oct. 14-15), if cleanup is done, the HR instance will be created early next week. Have learned more by doing manual data entry, have discovered the importance of effective dating. Converting monthly paid students (not grad assistants) into hourly/biweekly is taking more time than anticipated. Discussion included the possibility of those jobs remaining monthly. Joy and Nancy Dole will discuss and keep Bill informed. The issue may go to the executive committee.
- **Training** – no report
- **Finance** – Concerned about AR and tying to Banner AR and legacy AR; concerned about Cashnet and Banner; need a cashiering system that will work with Banner; Looking at reporting; finance team retreat at Yoder's in Arthur later this month. Discussion concerning cashiering system and payment gateway needs. Result is Sue Harvey will create a subgroup to examine cashiering systems and payment gateway.
- **Data Standards** – No meeting for 3-4 weeks, Linda Coffey is updating the document.
- **Data Custodians** – Had meeting 2 weeks ago; updating web site to make it easier to navigate. Julie Benedict is working on a long-term Banner/DARS website to integrate with UPG and data custodians.

Reminder to all teams: The process to have ITS write scripts to change PROD data during conversion is to first contact SCT actionline.

Duplicate PIDM – resolution for IRS? – Business Office has passed it on to Linda Coffey.

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General Person/Previous Names – Alternate IDs, when a new person is added manually to prod Banner, the SSN must be entered as an alternate ID; changed SSNs also need to be input as an alternate ID

Previous Names – waiting for Linda Coffey to test

General Person – waiting for user testing

Email any problems encountered to Libby Coffey before Wednesday, Oct. 18th.

Race/Ethnicity Code – Julia reported the group has agreement about what they plan to do. Need to check with CollegeNet and determine if it will be part of the original application. Production tables are correct. Julia will check both PROD and TEST. After they're verified, ITS will run the script to populate first on TEST. Users will verify results prior to the script running on PROD.

Reminder of Oracle Upgrade Dates:

10/9 – TEST

10/9-10/11 – PPRD, CONV

10/14 – 10/15 - PROD

ODS Session(s) feedback – sessions were repetitive, should have been scheduled much earlier in the project. Brief discussion about need for ODS administrator and possible tasks. Teams need to determine if they're going to use ODS, when they will need consulting. Finance has decided to use ODS.

General Student –discussion on loading general student ('AS') records (one for each term) up through Summer 2006. Unless ITS is notified of problems, loading will begin on PROD at 7:00 a.m. Monday, Oct. 16th.

County Codes/Verification – Alumni/student will verify

Campus Reporting Needs – Bill suggested teams should be consulting campus on reporting needs, not just using their current reports. Team leads stated it is premature to ask during system implementation – we don't know if the data will come from Banner or ODS. Users need to get used to the system and know what data is available. It would be upsetting to ask the campus for their needs now and then not be able to provide the data.

Reporting Tools – Bill's looking into additional resources on training; wants reactions on what is needed. If help is needed in scheduling Argos sessions, let Bill know

Decisions for referral

Tabled/Future discussion Items

Ongoing Task List, Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

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New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed: