

EISE Project Meeting Notes Eastern Illinois University

Team/Group: Cross Functional Collaboration Group

Date: 11-27-06

Time: 2:00 – 3:30

Place: MLK – Arcola-Tuscola Room

Attendees: Jerilyn Hutson, Thom Strohecker, Bill Witsman, Dave Bailey, Joy Craft, Cathy Ashmore, Kathy Reed, Tracy Hall, Sandy Bowman, Jone Zieren

Note Author: Kathy Reed

Agenda and discussion items

Team Updates

- **Advancement** – Consultant back this week for a general session. Trying to run reports, lots of little questions.
- **Financial Aid** – General consulting session one week ago. All processes are working, need to test to determine if they're working as needed for EIU. Training for Financial Aid staff over Christmas. Need support from administration to close office for training.
- **Student** – Setting up test cases for first mock registration; creating generic user accounts for clearing holds. Registration cannot have a mix of time ticketing options; will have to set a hold on all incoming students that can be cleared by the advisor after they have advised the student
- **HR** – Completed second parallel – October monthly and biweekly. First production payroll in Banner is monthly on Dec. 18th. Currently entering faculty raises in PROD – will parallel (November monthly payroll) to verify raises. Time entry will pilot first in HR and IR, then phase in rest of campus. CATS is designing timesheets, users will pull off the web, complete, and send to HR.
- **Training** – Week of Dec. 18th is last dual consulting week – will only use 9th St. after that time. Laptops can be used for customer service training. Trying to work out week of Dec. 11th. Looked at SCT CBT last week, positive feedback. Bill W. will buy if someone is willing to review it. It may need to be put on a server; Bill will talk to Brian Murphy. Bill will order general navigation CBT.
- **Finance** – no report
- **Data Standards** – Met, reviewed the updated document.
- **Data Custodians** – Haven't met since previous CFCG meeting. Cathy Ashmore met with Bill Witsman, Julie Benedict, and Tom McMullen about the main Banner website. Cathy will present it at steering committee next week. Cathy will talk to Larry Cannon about the documentation for resolution of duplicate pids.

GTVSDAX – institution preferred address type (with hierarchy) Discussion postponed till Student team lead is available

Race/Ethnicity Code – progress – Two part question now on applications, ITS need to know if all race/ethnicity validation tables ready for script to be run to populate race/ethnicity on people. Discussion postponed for student team lead.

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Activation/Deactivation of Students –feedback from Financial Aid consultant – Discussed during SCT consultant’s last visit. Inactive record is actually one term forward (student doesn’t show for a Fall or Spring semester). Student will have to be readmitted once they have an inactive record. Amy will give Tracy names of schools that are deactivating so she can check with their Financial Aid offices.

Purchase of CBT? – see Training notes above.

Feedback – Draft Resolution of Reporting Infrastructure - General comments from CFCG:

The functional position was the only position being addressed.

A new unit is not needed.

The functional position belongs in IR, technical position in ITS

Download of data should not be encouraged – encourages data silos due to availability of the downloaded data as well as providing points of security breaches

The paper was opinion based, needs to include research completed, other schools contacted, etc.

The functional position should not be an individual hired from outside EIU, resources exist by reassignment of current staff. The position needs to be ‘hired’ as soon as possible.

Larry Cannon had emailed the following questions, responses from CFCG follow:

1) [Since we don't have a site license for Crystal will be able to "share" reports as described in the document?](#)

Crystal reports will be able to be shared and scheduled via a product named rePortal. ITS is in the process of installing it.

2) [System access and security is an operational consideration as well as a reporting concern. I would hope that both responsibilities would fall to the "new" department/organization.](#)

The security for reporting is interwoven with Banner security, making separating the duties difficult and perhaps impractical.

3) [The document seems to minimize the work of the technical person \(staff\). Is that why the recommendation for the tech person to report to ITS? Or is it because it create conflicts if the tech person reported to another department.](#)

The technical tasks may be minimized because they are already being handled by ITS. If the tech person is located in some department other than ITS, he/she has no backup and the cross-training possibilities are eliminated.

4) [I would like to see written responsibilities \(a job description of sorts\) for the tech person and the functional person.](#)

The department(s) that will have responsibility for the tech person and/or the functional person should write the job descriptions.

Changes in IGPs/Board Regs - Current needs are being handled, others may arise (official reporting).

Decisions for referral

Tabled/Future discussion Items

Ongoing Task List, Action Items

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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: