

EISE Project Meeting Notes
Eastern Illinois University

Team/Group: Cross Functional Collaboration Group

Date: 12-11-06

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, Sandy Bowman, Jone Zieren, Larry Cannon, Libby Coffey, Julia Abell, Sue Harvey, Frank Kingery

Note Author: Kathy Reed

Agenda and discussion items

Team Updates

- **Advancement** – Moving along on second conversion of data. Group testing dates need to be set up. Reviewing reports, they have miscellaneous items they need to make decisions on as a team.
- **Financial Aid** – Met last Wednesday, discussed their in-house training that will start Dec. 20th and continue into week after Christmas. Will have a Banner workday on Friday, consulting this week. Bill W. is buying the CBT for the financial aid module.
- **Student** – Consulting last week, planned mock registration. Dates for mock registrations are: 12/18/06, 1/16/07, and 1/29/06. The January 29th will be a monster mock that will include the students walking through the process with the advisors, registration, charges assessed, and academic history rolled. If possible, would also like to include Financial Aid. This week is consulting for self-service for faculty and advisors. Added a new term indicator for quarters, 'WQ'. Will be assigning alternate PINs for self-service registration. Students will be able to sign onto self-service but not into registration without obtaining alternate PIN from advisor. Linda Coffey had requested additional AR assistance; Bill has not received a response from Mike Delaney.
- **HR** – Training in salary planner this week. In process of another parallel payroll this week, included pay raises, would also like to complete another biweekly parallel. Went live Dec. 1st with monthly, live with biweekly Dec. 11th.
- **Training** – Julie Benedict is working the Banner website, need to add materials. Met with Finance training team, may be putting a podcast online of their training sessions.
- **Finance** – Have 3 subcommittees meeting on reporting, attributes, and customer service. Trying to get reporting support from Evisions. Getting lots of calls on reporting needed, the customer service group is passing out helpful information for fiscal agents.
- **Data Standards** – No meeting.
- **Data Custodians** – During last meeting, discussed website, class modification forms and generic accounts for holds. The generic accounts will begin with HOLD and end in something pertinent for the particular office. Common matching has proved helpful in avoiding duplicate records.

Review of Address Types and Usage –

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Discussed previously approved address types and their usage. Approved the addition of HC for housing contract address type. Only Housing will update addresses with type HC. Housing will notify the student they have changed only the HC address type, the student will need to notify Records Office to update the SM address. SM address type to denote student mailing will be used primarily by Student and Financial Aid. On –campus students’ addresses of HC and SM type should be the same. Synchronization may be needed with Cbord. MA address type is used primarily by HR and Finance to denote address for Accounts.

GTVSDAX – institution preferred address type (with hierarchy)

Teams will review the processes for their module to determine usage of the institution preferred address type – many processes use parameters specific to the module

Race/Ethnicity Code – progress – ready for the conversion script to be run on TEST instance. Module leaders will be notified when it has been completed.

Refresh of EIU Training Instance – will occur the first Friday of each month unless team lead emails Kathy Reed at least one day prior to that time

Decisions for referral

Tabled/Future discussion Items

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: