

EISE Project Meeting Notes Eastern Illinois University

Team/Group: EISE Reporting Standards

Date: November 3, 2005

Time: 2:00pm-4:00 pm

Place: ITS Conference Room 3057

Attendees: Ken Gerhardt, Jerilyn Hutson, Karla Sanders, Jone Zieren, Dave Horsman, Bill Witsman, Dave Pollard, Not present: Julia Abel or Amy Edwards, Thom Strohecker, Martha Brown

Note Author: Bill Witsman

Agenda and discussion items

- Task to be accomplished & items to be included in the standards were developed and discussed. Questions submitted to the EISE project, another institutions standard document, and EIU's standard document guidelines were used to develop the following.

The Reporting Standards document shall provide

1. Clear guidelines (rules and policies) for the creation, distribution and use of EISE information distribution vehicles produced for use by the University or any external entity.
 - a. General statement about the purpose of the document
 - b. Scope of the document
 - c. Statement of University needs
 - d. Levels of users
 - e. Levels of reporting
 - f. Distribution methods – email, web, paper, data – what is appropriate
2. General and specific guidelines for the headers, footers and body of all EISE information distribution vehicles
 - a. Look at current
 - b. Look at what Banner standard reports look like
 - c. Look at external entity documents
 - d. Gather user needs
 - e. Who wrote (developed the analysis algorithm), when wrote, who requested this report, dates, term of school year, FY
 - f. Name of the report standard?
3. Guidelines that cover situations when data from Banner, DARWin and certain other related systems is combined with data from other sources
 - a. Statement of combined data – where and how to state this
 - b. Sources of data
 - c. Ask Julia/Amy, Look at IGP, Auditors
 - d. References to FERPA, HIPPA, other laws
4. Guidelines that clearly describe the difference between official and unofficial University reports and data (information distribution vehicle).
 - a. Header or footer statement?
 - b. Data file header or name?
 - c. When to indicate official/unofficial....

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- i. Reports within a department/unit
 - ii. Reports the go to externals or other U departments
5. Strategy for the training and ongoing support of University employees in the use of tools used to produce or use EISE information distribution vehicles
- a. Talk to University trainers, Sandy Bowman, Library, ITS, LCOB Small Busi Institute, CATS, Tech Net, Tool vendors, other external trainers, CBT's, State of Illinois trainers.
6. Recommendations for the acquisition of above mentioned tools via EISE project and via departmental funds
- a. Determine existing tools, usage, users, level of expertise
 - b. Contact other U's
 - c. Contact vendors
 - d. Tools/user needs
 - i. User usable
 - ii. Capable of easily extracting data
 - e. How many
 - f. Support level of each
 - g. Other formats – graphical, summary options,
 - h. Data import/export formats – various
 - i. Joining data – how
 - j. Comparison reporting capability
 - k. Sorting, selection,
 - l. Training resources
 - m. Help functions
 - n. Reporting repository and distribution capabilities
 - o. Report versus data formats

Decisions Made

Decisions for referral

Tabled/Future discussion Items

Ongoing Task List, Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
AIRS001	Review BSC document	All members	Next meeting	completed

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed:

Emails and questions from Housing Office about Banner reporting