

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	September 19, 2006
Time:	2:00 pm – 3:30 pm
Place:	Schahrer Room
Attendees:	Kim Harris, Cris Ealy, Lori Creek, Tami Babbs, Sandy Wheeler, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

☞ Designations

- The status of designations was discussed. Kim verified with Libby what was needed for ITS to upload the designations into TEST. Information for the columns on for the designation table is needed for ITS. A crosswalk is also needed for conversion. Cris and Kim were going to work on properly identifying the VSE information for the current ADS funds. Tami is going to research the University accounts as she has that information in the Business Office. ITS needs this information before the last technical session September 26-28. Kim will have something prepared for ITS to use to prepare the upload process.

☞ Validation Tables—next to be completed

- ATVOCON—Organization Contact Type
 - Kim indicated that she would review this validation table and prepare the information for the table.
- ATVMAST—Matching Gift Alumni Status
 - Kim will finish this table.
- ATVMERQ—Matching Gift Employee Requirement
 - Kim will finish this table. She has questions for Libby on this table.
- ATVMPRO—Matching Gift Procedure
 - Kim will finish this table.
- STVACTC—Activity Code
- STVACTP—Activity Type
- STVACCG—Activity Category
- STVLEAD—Leadership
 - The previous four validation tables are for the activity codes. Jerilyn will finish putting together what is needed for these tables. Since they are owned by Student, they will be passed on to the Student team leader to determine who will enter the activity information in TEST.
- GTVSUBJ—Subject Index Code
 - Cris and Lori will review the subject indexes. This code is used for prospect comments and for individual/organization comments. Kim will also review to determine appropriate codes.
- ATVDCYR—Gift Society Year
- ATVDCNP—Gift Society
- ATVDCST—Gift Society Type
- ATVDCAM—Gift Society Assignment
 - Cris and Jerilyn will work together to set up the gift society tables.

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- ATVIGRP—Interest Group Code
 - Kim has the codes for this table. Sandy will assist in entering the information in TEST and Kim will complete the crosswalk information.
- ☞ Procedures Documentation
 - Constituents and Organizations
 - Gifts and Pledges
 - Sandy contacted other universities to look at their procedures documentation. She will post what she received in the Advancement folder on the EISE repository. This will be useful as a reference in developing our procedures documentation. Drafts of procedures should be completed within two weeks of the appropriate consulting session while the information is still fresh for team members. Finalized documentation will be needed by the end of the implementation process.
- ☞ Upcoming validation tables to complete
 - Pledge validation tables
 - Gift validation tables
 - Academic information validation tables need to be completed. Jerilyn and Kim have been working on them. Any information needed for ADS conversion that is not included in the validation tables set up by the Student process team will be forwarded to the Student team lead requesting that it be added. The crosswalks will be completed as much as they can until all of the information is in the validation tables.

Decisions Made

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: