

EISE Project Meeting Notes Eastern Illinois University

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| Team/Group: | Advancement |
| Date: | October 16, 2006 |
| Time: | 10:30 am – 12:00 pm |
| Place: | ITS Conference Room 5012 |
| Attendees: | Kim Harris, Sandy Wheeler, Libby Coffey, Tami Babbs, Cris Ealy, Jerilyn Hutson |
| Note Author: | Jerilyn Hutson |

Agenda and discussion items

☛ Designations

- Tami is adding Finance data to the upload spreadsheet. Kim is verifying the descriptions. Tami had questions on some of the University designations and passed those back to Kim.

☛ Validation Tables

- Prospect: Cris discussed the prospect validation tables with Karla and has some notes to review. Libby is going to have David work on the prospect conversion. They would like to have it ready when Mike returns on October 31st.
- Membership: Jerilyn is still working on these validation tables and header forms.
- GTVSUBJ: David is ready to load this into TEST.
- Activities: these have been loaded into TEST.
- Majors: the extract program has to be rewritten and then academic information should be ready for conversion.
- AORCONT: Kim determined that most of the data being extracted is outdated. Anything that will be kept will be manually entered. A few will be entered into TEST for testing purposes. All contacts will be manually entered in PROD.

☛ Procedures Documentation

- Constituents and Organizations-draft to be completed by October 20
- Gifts and Pledges-draft to be completed by October 20
- Drafts are on the repository. The timeline can be changed to reflect that these drafts are completed.

☛ Testing conversion data in TEST

- The first round of testing as a team worked well. Tami suggested working through all of our test cases on each form before moving onto another form.

☛ Duplicate Reports

- Cris completed the first round of report 4. Kim asked about how to update to current name and spelling. Libby stated that prior to final conversion, a report can be provided to show anyone on SPAPERS and any discrepancies between ADS legacy information. The final rounds of duplicate records will be against PROD data so they should be more representative of current Banner data. Tami indicated that she was having trouble with report 6. The team provided a few options for researching information.

☛ Reporting Subcommittee

- Kim, Cris, Jerilyn and a rep from the IT team will work on reporting. Libby recommends submitting reports through Appworx and offered to look into setting up a demo.

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☞ Security Matrix

- October 27th was set as the date for team members to have information on what forms users in their office might need access to submitted to Jerilyn. These will all be compiled and shared with the team.

Decisions Made

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 |
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Attachments and/or meeting Handouts listed: