

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	October 23, 2006
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Sandy Wheeler, Tami Babbs, Libby Coffey, Kim Harris, Lori Creek, Cris Ealy, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

#### ☞ Designations

- The upload file is almost ready. It was scheduled to be completed by the 20<sup>th</sup>. Kim is still verifying information with Tami and the Finance side. Some information was still missing. She has some VSE codes to verify with Mike next week. Some of the data can be fixed after it is uploaded into TEST. It will need to be loaded prior to the next conversion run in November.
- Any new funds added to ADS after the upload file is sent to IT will need to be tracked. After the file is loaded into TEST, new funds codes will need to be entered in Advancement as well as ADS.
- A crosswalk is also needed prior to the next conversion run in November.

#### ☞ Validation tables

- Cris is ready to complete the validation tables in TEST. She has a question on where the development officer assignments will be in Banner. This may be a question for Mike when prospect management is discussed next week.
- Membership information has not been completed yet.

#### ☞ Honorary degrees

- The team decided that it would like to track information on who receives honorary degrees. Cris will obtain a list of the degree codes from the vice president for external relations office. Jerilyn will then work with the student team to have the honorary degree codes added to Banner.

#### ☞ Testing conversion data in TEST

- Libby provided a summary of the first batch of testing. The conversion scripts are wanting to tie all the phone numbers to an address type but this should not be the case. Libby is still researching.
- The next round of team testing will be on Wednesday afternoon.

#### ☞ Duplicate Reports

- The team is moving through the reports. The first person for each report should be completed by October 25<sup>th</sup>. The second person then has time to review prior to the November 8<sup>th</sup> deadline.

#### ☞ Next consulting session

- The next session will be next week. Jill Nilsen, Karla Evans, Jackie Joines and John Schmitt have been asked to attend on Tuesday to discuss prospect management.

#### ☞ Procedures documentation

- Kim asked how to proceed if there are suggested changes to the documentation drafts. Any revisions should be sent to the originator. The originator will make

## **EISE Project Meeting Notes Eastern Illinois University**

the changes and notify the rest of the team that the documentation has been updated.

### **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:**