

## EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	November 6, 2006
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 5012
Attendees:	Cris Ealy, Cas Searcy, Tami Babbs, Lori Creek, Kim Harris, Jerilyn Hutson
Note Author:	Jerilyn Hutson

### Agenda and discussion items

#### ☞ Designations

- Libby did find that there is a referential integrity issue with the campaign type for designations. Therefore, the campaign type needs to be included with the upload file for creating designations. Kim will work on that information and add it to the upload file today.

#### ☞ Testing conversion data in TEST

- Kim, Sandy and Cris need to submit their testing results for the gift data and matching gift information.
- The deadline for academic degree information and activities will be extended to November 13<sup>th</sup>. Jerilyn will send out the form information so team members know where to look in Banner TEST for this information.

#### ☞ Duplicate reports

- Reports 3 and 6 are outstanding and are due by November 8<sup>th</sup>.

#### ☞ Timeline

- We are keeping up with items on the timeline. We may need to add self-service and ODS to the timeline. Only the consulting session for self-service is in the timeline at this point. The team will need to meet and discuss how to roll out self-service, which components will be used, etc. The reporting subcommittee will be working on the ODS implementation and it should be added to the timeline.

#### ☞ Next consulting session

- The next consulting session is a session to cover conversion issues. There will not be an agenda from Mike. Jerilyn asked team members to forward any topics to discuss with Mike prior to the session. This may be a good time to review reports/processes, questions on how to handle specific situations, etc with Mike. The next conversion may not be completed before Mike is here due to the reassignment of David on another task for a short time.
- Kim referred to a topic on the BALUMNI listserv regarding overpaying pledges. The posting indicated that our current process may not work smoothly within Banner so this would be a good topic to discuss with Mike and test our scenarios as well.

#### ☞ Evaluations

- Evaluations of last week's consulting session are due to Jerilyn by November 10<sup>th</sup>.

#### ☞ Outstanding issues?

- Jerilyn asked team members to forward to her any outstanding decision items, such as who will be supervisors, security issues, etc. One of the upcoming team meetings will be devoted just to these decision items so they can be worked out.

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Tami suggested speaking with Mike Hutchinson on security and testing security roles.

### **Appworx**

- Cas will provide a brief demonstration of Appworx at the next team meeting.

### **Reporting Subcommittee**

- The reporting subcommittee will be holding its initial meeting on November 7<sup>th</sup>. The subcommittee will be comprised of Cris, Kim, Jerilyn and Cas.

### **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:**