

EISE Project Meeting Notes Eastern Illinois University

Team/Group:	Advancement
Date:	December 4, 2006
Time:	10:30 am – 12:00 pm
Place:	ITS Conference Room 3057
Attendees:	Sandy Wheeler, Lori Creek, Tami Babbs, Cris Ealy, Libby Coffey, Jerilyn Hutson
Note Author:	Jerilyn Hutson

Agenda and discussion items

☞ Testing Dates

- The team testing dates are December 14th, 15th and 19th from 1:30 – 4:30 pm. Testing will be done at the annual fund office at 9th Street Hall. Jerilyn has contacted Sandy Bowman and laptops should be available for use during the testing dates. These dates are contingent upon the second conversion taking place prior to the scheduled dates.

☞ Security matrix information

- Jerilyn distributed a first-draft of the security matrix. Information for the Alumni Services office still needs to be added. Team members should begin reviewing their information in the matrix to determine if corrections need to be made.

☞ Prospect management procedure manual draft

- Cris is working on the procedure manual draft. The draft is due December 11th.

☞ Outstanding issues

- Jerilyn marked the issues discussed with Mike last week in purple on the spreadsheet to indicate that they were reviewed and/or resolved. The team will begin discussing the remaining items during the next team meeting on December 11th.
- Tami suggested we look at cross-training some of our users as well as we develop our procedures with Banner to help when staff members are out of the office. This will also be discussed further by the team.

☞ Milestones

- Jerilyn shifted a couple of dates on the list of milestones due to the second conversion being pushed back a couple of weeks.

☞ SETA Conference

- Tami shared some of the items she learned about during the SETA conference last week. She will be sharing more information with team members.

Decisions Made

Decisions for referral

Tabled/Future discussion Items

Ongoing Task List, Action Items

**EISE Project Meeting Notes
Eastern Illinois University**

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: