Enrollment Management Implementation Team
OnBase Audio
1/27/2009
3:00 PM

AUDIO INFO
Toll-free number: 800-893-8850
Participant PIN: 5460572

Attendees:

**SW:** Russ, Robbie, Alicia, Mike E, James
**UAA:** Patty, Carolyn H.,
**UAF:** Libby, Rodney, Lael, Julie, Colleen, Brigitta
**UAS:** Barbara H., Shayla, Diane

**Agenda:**

**MAU Updates/Issues:**

**UAA** – No updates

**UAF** – no updates – love app enabler

**UAS** – no updates

**SW / EAS** – OnBase Service Pack upgrade – Feb 16 – TEST, Feb 23rd – 25th - PREP, March 26th at 5 PM for system Back up and out all day the 27th - PROD – Back up for March 30th.

App Enabler – Please start to list Banner Screens and what OnBase Documents you want tied to those screens – what each area agrees to Admissions, reg, grad, FA per screen print

Foldering – in Prep for review - Where are we on this can any of it be moved to PROD?

Any changes needed?

- Folder tabs
  - Admissions GR (All AD Docs except for UG application)
  - Admissions UG (All AD Docs except for GR application)
  - All Tests(all AD tests),
  - Financial Aid (All FA Docs under this tab)
  - Reg Graduation (RO Change of Major, RO Petition, RO Degree Check Sheet, all RO Graduate documents, and RO Graduation Requirement Report)
  - RO Transfer Eval (All AD Test Scores, and AD Transcripts, and AD Transfer credit comment sheet)
  - Registrar ( RO Add/Drop, RO Admission Document, RO Audit Ltr, RO Change Form, RO Change of Grade, RO Change of Major, RO Ltr of Recommendation, RO Transcript (College), RO Transcript (High School)

AD transfer to RO – Currently what is taking place is the new RO Document are being added to OnBase Prep and the corrections to the workflow are being started in Test, then they will be moved to PREP for your testing.

Retention Schedules for documents in OnBase – Still need Financial Aid Retention information.
Task Requests:

Completed/In Prod – 77_TR_OnBase_Crs Subj codes.doc

When testing is complete/will move to prod –

FA_IMAGE_VIEW_BO_CLS = fa_view_bo (TR 53)
Documents in this class are FA Checks, FA Releas, and FA Schol

SI_IMAGE_RO_CONFIDENTIAL_CLS = ro_confidential
Please let me know what doc types should be added to this class

SI_IMAGE_AD_CONFIDENTIAL_CLS = ad_confidential (TR 31)
Please let me know what doc types should be added to this class

Also added to OnBase PREP was the request for (TR 82)
AD Financial Statement and AD Financial Supporting Docs are only allowed to be seen by
AD_Manager
AD_Specialist
EM_Scan_ADRO_UAA
EM_Scan_ADRO_UAF
EM_Scan_ADRO_UAS
International Review
RO_Manager
Would you rather these documents be put in the ad_confidential security group with only folks in
that group able to see them?

81_TR_OnBase_Create_RO_Graduate_Document_Study_Plan.doc
82_TR_AD_Financial_Doc_Security_Restrictions.doc
83_TR_OnBase_AD_NSE_Doc_type.doc

Received –

84_TR_OnBase_RO_Processing_Timer_for_ROP_NOB_Queue.doc
85_TR_OnBase_RO_Processing_Error_Queue_Reveiving_Campus_Keyword.doc
86_TR_OnBase_RO_Sort_Order.doc
87_TR_OnBase_AD_GARF_Email_Form_with_onbase_fields.doc
88_TR_OnBase_AD_Dept_Review_Form_with_onbase_fields.doc
89_TR_OnBase_AD_Inc_doc_Form_with_onbase_fields.doc

Other Items:

Would like to set up a meeting with each MAU to discuss this – UAS meeting on Friday Jan 30th at 10 am

From Rory:
ITEC needs a written description of "SES being fully implemented with OnBase" so that the gap between
the current state and the desired future state can be discussed, and so that an approach for on-boarding additional
university functional areas can be drafted.

In addition to identifying the remaining work to achieve full implementation and the remaining investment in
new equipment and/or new software licenses, recommendations for how to conduct that work (insource,
outsourcing) and how to finance the costs (centralized, decentralized) are needed from the (SES) group
governing adoption of / changes to this application.
Finally, the ITEC would appreciate comments on how the current deployment approach worked for U. Alaska. Share thoughts on parallelizing (accelerating) how we deploy enterprise solutions.

Russ understanding that steve smithe wants to know when student is going to be fulling implemented in onbase
Russ understanding is that each mau has implemented onbase and is using it. Growth and increase us in this is in the area of different workflows and areas.
UAA would like to see finance using this to do had offs on bills with in the imaging system

Mike E. – creating security class that would have access to certain class of documents for student and enrollment services across MAU’s ex. Ferpa policy,

From Peggy:
what reporting is available through OnBase, and how to access them?
Reports that can be run from OnBase
Alicia can run these reports then send them to you or create a document type with in OnBase for these to be stored – (These can not be broken down by MAU)
Batch Audits – can not be broken down by MAU reports batch number, Number of Documents and number of pages
Batches Scanned by User – shows user ID and how many batches
Batches Scanned per day – shows date and number of batches (Can not be broken down by MAU)
Document counts by type – Shows document type and how many (Can not be broken down by MAU)
Document Process time per Workflow queue – Shows queue name, document processed, min time in queue (days), max time in queue (days), and average time in queue (Days) – (Can not be broken down by MAU)
Document types view by user (lists document type and the count (number of users that looked at that document type)
Documents deleted by Users – shows user ID and how many documents deleted (does not show/list document types)
Documents processed per queue – shows life cycle, queue name, User ID and how many
Failed logins – Shows User ID, Detail, Date, and number of failed log ins
High or low document processing identification – shows queue name, item name, date entered the queue, date exited the queue, duration (in hours) and user ID
Last user log in date – Shows user ID, user real name, and last log in date and time
Monthly scanned documents – Shows year –month user ID and Number of documents scanned
Monthly scanned pages – shows year – months user name and number of pages
Off peak user activity – shows sub-system, login date and time, detail, and user ID
OnBase Groups and their users – shows OnBase user group name and user IDs in that group
Page count by scan queue – shows scan queue name (by mau) and number of pages
Print statistics per month for the year – shows month and how many documents were printed (not number of pages)
Scanning by user per day – shows date, user ID, and number of documents scanned
User Log ins – Shows Sub system, User name, and total number of logins
Workflow timer information – shows computer name, life cycle name, queue name, timer name, frequency, days, hours, minutes
Workstation last log in – shows computer name, description, and last login date and time
Other reports – these are found in the sys Transaction logs or the sys list contents reports
Document history – shows User, Action (tells what action document create/delete/viewed, keyword added deleted, document modify actions, document notes created/modified/deleted/viewed, document process action, document printed, folder activity, and keyword activity), date and time, and messages (describes what was done)
Processing – shows user, action(committed data, create batch, purged data), Date and time, message (describes what was done)
Workflow user events – shows users entering the workflow,

AD Autofill – does it only look at SAAADMS or does it also look at SGASTDN? – if they have a saaadms
Only loooking at SGASTDN or SARADAPT is there a record with pidm existing.

What does the RO Autofill look at? Looking at sfrstcr = basic reg record and shrtckn = shows academic history.
Looks at SPRIDAN for academic history transaction and SFRSTCR record and SHRTCKN record

OnBase PREP workflow Icons – missing – these should have all been fixed and all icons are visible in the work
flow now. If not please let me know what is missing.

OnBase Prep – Removed the following documents for the from ROP Life cycle and have the documents going
in to the ROG life cycle initially. The document types affected are: RO Application (Graduation), RO Graduate
Document (Advancement), RO Graduate Document (Comp Exam), RO Graduate Document (Defense), RO
Graduate Document (Misc), RO Graduate Document (Petition) – Please test and let me know if these
documents are working as expected in the workflow.

UAF – Pair is asking for OnBase access to do institutional research,
Have UAA or UAS IR had access?

They want to do a comairson on classes
They want to look at information not entered in banner (Transcripts) ie what classes they took in high
school…. To compare there enrollment/graduation process at the U? They would do a sample of students
and look at them individually

Documents in workflow for more than 60 days
ADCM Processing – has documents dating back to 1/3/08 (UAF & UAS) –
ADIA Review – Up to Date
ADP Processing – has documents dating back to 08/16/07 (UAF, UAA, Campus I, & D) –
ADP Application Processing – has documents dating back to 11/12/08 (UAA) –
ADP Mail Out - has documents dating back to 3/21/07 (UAA, UAS) - TR # 71 remove this queue
ADP NOB – The documents have been removed from this queue by the timer that was set for 24 months
(dating back to 2/12/07)
ADP Error – has documents dating back to 03/24/08 (Campus D, & P) –
ADR Review – has documents dating back to 7/24/08 (UAF) –
ADR Correction – has documents dating back to 05/14/07 (UAA) –
FAP Verification – has documents dating back to 07/11/08 (UAF) –
FAP Business Office – has documents dating back to 01/10/08 (UAF) –
FAP Forecast – has documents dating back to 8/19/08 (UAF) –
FAP Other – Up to date
FAP Professional Judgment – has documents dating back to 07/11/08 (UAF)
FAP Scholarship – has documents dating back to 11/06/07 (UAF) –
FAP NOB – has documents dating back to 10/12/07 (UAS)
FAP Error – has documents dating back to 05/22/08 (UAF) –
ROG Processing – has documents dating back to 02/29/08 (UAS) –
ROG Awaiting Graduation – Up to date
ROG Review – Up to Date
ROG Audit Complete – has documents dating back to 07/25/08 (UAA, UAS)
ROG Audit Incomplete – has documents dating back to 1/29/08 (UAA, UAS)
ROG Incoming Mail – has documents dating back to 8/11/08 (UAF & UAS)
ROP Registration – has documents dating back to 08/18/08 (Campus P, UAA, UAF & UAS)
ROP Records – Up to Date
ROP Transcript Request – Up to date
ROP Correspondence – has documents dating back to 07/18/08 (UAA, UAF, UAS, & Campus P)
ROP Publications/Scheduling – has documents dating back to 9/29/08 (Campus P)
ROP NOB – has documents dating back to 10/08/06 – No timer to remove documents from Life cycle (UAA, UAF and unknown campus (not sure if receiving campus was not indexed or if receiving campus was removed in workflow process)
ROP Error – had documents dating back to 03/05/07 (Campus D, P, Y, UAA, UAF & UAS)

Reminder - If there are problems with OnBase (workflow, timers, etc) please email them directly to sddit@email.alaska.edu