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: Alicia, Jane, Dan
UAA: Patty, Linda, Shelly, Sandy
UAF: Brigite, Rodney, Libby, Colleen, Caty
UAS: Diane, Shayla, Barbara H.

Agenda:

MAU Updates/Issues:

UAA – no updates

UAF – no updates

UAS – things are going good

SW / EAS – Thank you for the meetings 2 weeks ago to discuss with us how you felt the implementation went and where you are currently with using OnBase and being implemented.

Working on repackaging the service pack software

Task Requests:

Completed/In Prod –
FA_IMAGE_VIEW_BO_CLS = fa_view_bo (TR 53)
Documents in this class are FA Checks, FA Releas, and FA Schol

RO Application (Graduation) now goes in to RO Graduation workflow life cycle not RO Processing workflow Life cycle

When testing is complete/will move to prod –

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
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 – None

Other Items:
Document types in OnBase - Attached

Retention Schedule – Attached – Libby will be looking in to the AD documents missing retention

FYI – Reminders:

App Enabler – Please start to list Banner Screens and what OnBase Documents you want tied to those screens

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.
Documents in workflow for more than 60 days
ADCM Processing – has documents dating back to 1/3/08 (UAF & UAS) –
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 – 1 document with a hold) –
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 2/27/07)
ADP Error – has documents dating back to 03/24/08 (Campus D, & P) –
ADR Review – has documents dating back to 12/4/08 (UAF) –
ADR Correction – has documents dating back to 05/14/07 (UAA) –
ADR Data Entry – has documents dating back to 12/18/08 (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 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 Review – has documents dating back to 11/06/08 (Campus I) -
ROG Audit Complete – has documents dating back to 09/03/08 (UAA, UAS, Campus P)
ROG Audit Incomplete – has documents dating back to 1/29/08 (UAA, UAS, Campus P) – Most Docs seem to have HOLD on them but some have New Docs tied to them.
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 Correspondence – has documents dating back to 09/22/08 (UAF, UAS)
ROP Publications/Scheduling – has documents dating back to 9/29/08 (UAA, 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

OnBase Outages:
- OnBase Service Pack upgrade – must have all batches cleared from the scan and index queues
  - 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

Diane – approve foldering for Admissions and registrar as is move to PROD and have a list of banner forms for App enabler to retrieve documents in OnBase while in Banner.
Patty – if 300# is not autofilling what should we do for processed document? UAF, UAS enter 300 # and add as much information as possible to be able to search for student record. Alicia will check if these records do go to the error queue.

Libby – 2 docs belong to campus I and one belongs to campus X

Contact Hyland – about load balancing for some documents going in as ad manager load balancing not uaa, uaf or uas load balancing.