Enrollment Management Implementation Team
OnBase Audio
2/24/2009
3:00 PM

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

Attendees:

**SW:** Alicia, James
**UAA:** Patty, Joan, Shelly
**UAF:** Crystal, Brigitte, Colleen, Lael, Libby, Caty
**UAS:** Shayla

**MAU Updates/Issues:**
- **UAA** – None
- **UAF** – None
- **UAS** –

**SW / EAS** – OnBase service pack upgrade – java client is broken with the 7.2.1.233 service pack there is an new service pack version 7.2.1.241 that has a fix in for the java client I also have questions to them about giving me any ideas on what was changed in this new service pack? I don't want to plan for this next service pack to find out that app enabler, Java client, virtual print driver, records management or something else we depend on will not work.

  Patty – what the changes are before spending time testing
  Pose a question to the list server and ask who are using macs currently to connect to OnBase.

**Task Requests:**

**Completed/In Prod –**

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**
**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 – None

Other Items:

From Libby:
Something I ran across when going through admissions work team notes from November. Regarding the transfer to RO: Those students who apply and do not matriculate but do have prior records or prior attendance at UA-those should not be destroyed but currently would not transfer to RO because there is no enrollment for that term. Can an additional question be written into the transfer to RO process to account for prior UA attendance?

At UAF – paper world keep supporting documents can
Alicia to get with Jane
UAA, UAF and UAS all agree

From Rodney:
Processed document for RO Graduation lifecycle are going in to the life cycle as if they were scanned in as unprocessed. – Alicia looked in to this and seems that the RO Graduation lifecycle is not looking to see if the documents are processed or unprocessed so all documents are going in the lifecycle and need to be worked out. Need a TR created to have the processing rule written up for this life cycle.
This affects all documents going directly in to the RO Graduation lifecycle
RO Application (graduation)
RO Graduate Document (Advancement)
Graduate Document (Comp Exam)
Graduate Document (Defense)
Graduate Document (Language)
Graduate Document (Misc)
Graduate Document (Petition)
Graduate Requirement Report

From Alicia:
Last audio the question was brought up do all documents (processed and unprocessed) go through the lifecycle/fill queue. The answer is yes assuming the document is tied to a life cycle and the life cycle is written to do this process. I have not had a chance to look at all of them but the AD Processing life cycle is doing this. So long as you do not type a students last name in the field.

For example the ADP DCD looks to see if the Processing Status kw= processed if true then the document is routed to the ADP Fill queue.
Once in the ADP Fill queue the timer looks to see if a last name exists in the keyword if true then the next thing this queue looks for is does the processingStatus kw = processed if true then the document is removed for the AD Processing life cycle.
If false and the document type does not = AD Request(fresh start)transcript (High School, college, etc), AD Change of major, Int'l Eval Credit, AD AP/CEEB/IB Score, AD CLEP Score, AD DANTES Score, or Transfer Credit Support then the document will stay in ad fill for 2 days then move to the ADP Error queue.

Alicia to check RO and FA life cycles also this week.

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 – Will start moving to prod this week

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.

Alicia to check workflows for I campus and let shelly know when the docs are move for her to see them.

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 23\textsuperscript{rd} – 25\textsuperscript{th} - PREP
March 26\textsuperscript{th} at 5 PM for system Back up and out all day the 27\textsuperscript{th} - PROD – Back up for March 30\textsuperscript{th}