Enrollment Management Implementation Team
OnBase Audio
5/06/2008
3:00 PM

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

Attendees:

**SW:** Russ, Alicia, James Milburn, Mike E.,
**UAA:** Patty, Fran
**UAF:** Lael, Colleen, Brigitte, Deanna, Caty, Libby
**UAS:** Diane, Jen, Barbara H

Agenda:

**MAU Updates/Issues:**
- **UAA** – No report

  - **UAF** – No report, FA is only using it for retrieval and won’t be using onbase workflow. Some of the campuses are scanning – Nome – not scanning and TVC and Chucki – is scanning

  - **UAS** – Sitka now has scanner and will be visiting UAS in a week or two for training

  - **SW / EAS** –

**Task Requests:**

**Completed/In Prod** – TR # 14 and 33 are in PROD

**When testing is complete/will move to prod** – TR # 25 - making some changes to this TR – the question will show up for UAF and UAA per their request when working with postpone documents – “Have you updated your application? I will let you know when that change has been made. UAS does not like to see the question

  - 42 – UAA, UAS said move to PROD
  - 43 – Changes were made please test and let me know if it is working for GR applications – UAA & UAS said move to PROD
  - 44 – UAS Deferred to UAA and UAS as they do not use this UAA – Please move to Prod,

**Received** – TR # 34 – to revisit and discuss – Patty - I ask that we bring this back up to see where we are on the new solution. We continue to miss students who have a ‘C’ status that is OLDER than 21 days so we cannot rely on OnBase providing us with the correct students. Students are impacted in that we are not getting them admitted in a timely manner that impact their financial aid and other school attending decisions.

This does not go back far enough for UAA – would like to have the cold process go back more than 21 days as far back as Spring 2007.

  - Mike this is a view in banner that the cold process looks at and only pulled 1 time if they have a C status and right now they are not getting pulled

Patty – when a student has been with UA system for many years and grad a couple years ago.

Want the view to capture all C status students
Libby would this be for everyone? Yes

James – understand what we are asking for but talked to Gregg about it and the concern seems to be the potential for flooding one of the error queues - when the view has an app that OnBase does not have. The first time it runs there will be a lot of errors but after that it will not be. Understanding from gregg it will be an everyday dump in to error not just a 1 time
Spring 2007 set for the starting point as to when we started process items in OnBase – keep that date set do not change it.
About 20,000 records

Some one will need to write up a TR for a system queue to clear out the documents from the ADRR Error queue after some many days so users don’t need to manually touch each record to purge.

James will pursue moving this to test and LRGP

52_TR_OnBase_ALC Transcript Type.doc – Patty – Anchorage is responsible for managing the adult Learning Center – This was discussed with the Registrars and use the RO transcript Other Document type – UAS wants to think on this a little longer

How long is a reasonable time to maintain the document in OnBase?

Need to revisit the storage and how large the documents are to prepare for the amount of storage will be needed.

53_TR_OnBase_FA_VIEW_BO.doc – Mike E -
54_TR_OnBase_Custom Query ADFARO.doc – Mike E.
55_TR_OnBase_Manager Queue.doc – Lael
56_TR_OnBase_doctype_ad_transcript ua_unofficial.doc – Lael
57_TR_OnBase_AD Residency Queue.doc - Lael

Other Items:

Lael - Just something for brief discussion during the meeting or FYI regarding items in the NOB queue.
Occasionally the clerks notice that documents are checked into the SAAADMS checklist but have not been moved from the NOB queue to the student’s file. We are wondering what happens to these documents if they are never routed out of the NOB queue? Will they be purged when the 24 month retention cycle for the NOB queue hits? How does this affect our overall retention schedule?

Upgrading from OnBase 5.2 – 7.2 – Starts in OnBase Prep Friday May 9th at 5:00 PM
Attachments 7.2 release notes
Screen shots of Thin client
Testing plans – need weekly updates (every Friday) send test plans back with results for that week along with questions if something has changed and you want/need clarification
Student testing procedures

OnBase Prep projected down 5/9 at 5:00 PM – 5/16 may be longer but will be up ready for testing June 2nd as we discussed before. How ever we will need a few testers to be available 5/12 – 5/16 to test right after the
upgrade is complete to make sure icons are their, documents can be scanned in with out errors; check a couple workflows to make sure documents are moving. Need users from each area on each campus (AD, FA, and RO) including those who use web only to connect.

Testers lists as of today
UAA
Patty Itchoak
Joan Lewis (scan/indexing)
Sarah Phillips (scan/indexing)
Patricia Kelly (scan/indexing)
Carolyn Hanthorn
(scan/indexing)

UAF
Deanna Dieringer
Susan Culley
Carrie Coxon
Emily Thielke
Brigitte Mayes
Melissa McGinty
Mae Delcastillo
Julie Parshall
Michelle Benjamin
Lael
Caty
Rodney

UAS
Mike Farrell

1 problem encountered is Disconnect scanning – we can not have 5.2 and 7.2 on the same machine. Disconnect scanning 5.2 works well with uploading documents in to 7.2 how ever 7.2 disconnect scanning does not work with scanning in to OnBase 5.2 so to move beyond this point we need to have separate machines for Disconnect scanning (testing purposes) – need some discussion on this. Disconnect scan – no longer have to adjust window for document separation

Possibly have the option to change server connection once already logged in to disconnect scanning I.E. Prep to prod or prod to prep. Will not know for sure until we have upgraded PREP to 7.2 for me to test. Reason I am not positive is because our user name SNADW defaults in the user name field and is grayed out so we can not change it. I need to look at security to see if that can be change to default to our 30 mil #.

OnBase outages – OnBase PREP Friday May 9th 5 PM – May 16th

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