Enrollment Management Implementation Team
OnBase Audio
5/23/2007
10:30 AM

Audio Info:
Toll-free number: 800-893-8850
Participant PIN: 5460572

Attendees:

SW: Dan K, Alicia Wyse, Gregg Christopher, Russ O’Hare, Chris Young, Janet Johnson, Mike Earnest
UAA: Peggy Byers, Ted Malone, Sandy Gravley – Mat-Su
UAF: Lael Croteau, Anne Marie Nache, Libby Eddy, Rodney Thompson, Colleen Abrams, Bregitte Mayes
UAS: Barbara Burnett, Diane Meador, Claudia

Agenda:

Task Follow-up (from last meeting):
1. UAA, UAF, UAS need to gather testing plan information – solicit input from primary users i.e., workflows used, processes, docs, keywords, etc.
   UAS admissions and records started - Diane
   UAA – Peggy will be sending out an email to add OnBase to there testing plans will have a draft soon
   UAF – none

2. AD and RO Non-Trad Credit Request in prep – need approval before moving to PROD
   No one tested – UAF does not use in workflow, UAS does not use
   Peggy will have Craig test it

MAU Updates:

UAA – Peggy – Discuss having transcript come in for other campus and UAA processing is locked on banner – never now when document arrives discuss possibility of scanning as unprocessed for campus that is looking for it – UAF is emailing person that made the request when it is scanned in. – UAS keeps spreadsheet on student they are waiting for will look weekly. Would be nice to be notified. UAA has cover sheet to fill-in doc type and check box to scan in as processed or unprocessed – Rodney would like some kind of standardized form – Peggy will email their form to Rodney. UAA not getting follow up email – UAF – takes 2-3 days to scan in once requested.
   Peggy – sent out request to have transcript scanned and get the entire student file under one document type code even if it is archived goes to RO based on document type –
   Sandy – how are you using RO archive – Rodney student reapplies Sep by current admissions docs or RO docs and scanning in all old docs as RO archive file
   Diane – Anything that is not part of the current term – if someone requests a degree audit in spring and applied for admissions in fall take prior docs and put in archive and the ones needed to go to workflow are separated out to go in to workflow.

UAF – Lael – working on task request and submitted today. Working through issues with workflow and going back in to the work flow after they have been processed already – staff noticed data entry queue if items were not processed in banner on the same day they go back in to the data entry queue
   Update banner – needs to be done the same day
   Anne-Marie – staying late after 5 and students are still not being caught
   UAS – AD unknown – listed in retrieval index – not on scan side
   Diane – rolling out thin client access to advisors and is going pretty good
**SW / EAS** - Gregg – finished TR for cold process time period – looks at the past 3 weeks of data – will circulate spreadsheet to staff for a check. Anne Marie – timers did not fire on Monday night.

**Gregg** – Rick has reported a number of errors in prod and we are held up until we find out what the consultants did in prod. Working on prod system is reliable before working on more TRs. This does include the timers going down. Anne Marie – working on paper but when timers fire they are having redundancy. Also need to make sure there are no orphaned documents

**Gregg** – wants to hear complaints so we know and can provide better service

**Task Requests:**

Prep testing needed

1. Please test AD Department Supplemental Form in OnBase PREP
2. Please test AD Department Letter of Denial

New TR’s

3. 24_TR_OnBase_Request to Withdraw – Lael currently being processed as incoming mail – have to click individually on each communication to see which one it is – Claudia is it a letter? – Lael it is a letter or email not a specific form – UAA – Approval, UAF – approval, UAS - approved
4. 25_TR_OnBase_Request to Postpone – Lael – currently the document is there and in the life cycle for ADP Processing and want it moved to ADP application Processing – need it to go directly in to ADP Application Processing. All approve
5. 26.TR_OnBase_Teacher Certificate - Claudia – this document is not going in to on base at all need this document type created - approved by all

**Other Items:**

1. OnBase Scanning Audio update – Rodney lead scanners meet for the first time – 8 attended meeting went well Rodney is chair – if you want someone on the list serve email Rodney, meeting June 19th at 9 am and July 17th at 9 am once per month. Asked about scanner issues – recommended if scanner issues go to your campus IT dept first before going to Alicia. A lot of great questions and feedback from everyone.
2. Tracking the counts for the documents from enrollment management – at last steering committee recommended additional funds for additional storage – request 8 terabytes of storage about $60,000 last about 10 years – some questioned the accuracy of #’s UAA wanted us to continue tracking average # of pages per doc to see if those # hold true. We will continue to ask MAU’s to keep track of num of pages per documents – UAS imports a lot of docs not scanning – Gregg - can write reports for it just like in banner – if you describe what you want EAS can write them. Work with Alicia on this and EAS will find away to deliver it.
3. Data entry in OnBase/Banner Attachment: OnBase Problem. Data Entry – has been address Anne Marie will send an email to Gregg

**Additional agenda items:**

Right Fax – Russ – need to purchase captatis right fax - $70,000 for software digital boards. Does not include hardware servers, phone lines, do we want local lines 800 lines, how many lines would we need for this? Who is going to index when these come in for your campus? Peggy has several in the offices. Since the hardware and software will be at statewide how will this be handled. UAS has several and UAF has several all local #’s
Mike – getting junk faxes, personal faxes, and need dedicated line for stuff to go into OnBase
Russ – will go through dip process as if it was scanned who ever indexes would determine where it goes.
Ted – enrollment management could go down to 1 fax line.
Rodney – is there a demo on this product.
Russ – right fax is not part of the OnBase system – Hyland is a reseller of this product

Best estimate on finance/em/and other offices – FY09 we will have purchased well over 1 million Dollars worth of OnBase items

Peggy – Can Alicia send out a new doc list occasionally?  Alicia yes

Mike E – working on getting a contract with a vendor to have electronic transcripts sent to the university central location looking at implementing over the summer.

**Tasks for next meeting**