Enrollment Management Implementation Team
OnBase Audio
10/9/2007
3:00 PM

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

Attendees:

SW: James Milburn, Alicia Wyse, Gregg Christopher, Dan Kleoper, James Elieff
UAA: Shelly Blatchford, Patty Itchoak
UAF: Rodney Thompson, Libby Eddy, Brigitte Mayes, Lael Croteau, Tamara Hornbuckle, Caty Oehring
UAS: Phone lines were down

Agenda:

Task Follow-up (from last meeting):

MAU Updates/Issues:

UAA – Patty meeting with evaluation and admission work team discussing why some of the documents are not getting to evaluations. Think they identified why just want to make sure. Some sluggishness in OnBase. Gregg 2 ways of running the thick client on desktop and on server. Dan change on server or clients or both. Gregg believes change would be to the server. Dan complete app change. Gregg yes to his understanding.

College of ed wants to utilize OnBase for there documents.

Gregg – OTTC recommends starting small 1 doc type and get user base comfortable with OB before expanding

UAF – Lael working with the grad school to implement a training for dept on OnBase. First training session today went extremely well, Logging in thin client for retrieving docs.

UAS –

SW / EAS – UAA, UAS, UAF 10:00 – 10:15 Tues Admissions Reg

Task Requests:

Completed/In Prod – Level for AD Application UG is in Prod

In Prep waiting for testing - Redaction user group added to Onbase Prep
AD Transfer Credit Support Document Type

Received –
Other Items:

1. From Libby –
   Can we talk about creating a document type called AD-Cancel letter? This is different from our withdraw letter. This is the letter we send to all the 'no shows' when we do the purge and transfer to RO process (about 700 each semester).

   I was thinking it would be easily spotted in the file and would be noticeable as different than a request to withdraw (currently scanned as incoming communication). I'm not sure if we are trying to limit the number of documents or if we intentionally wanted more broad categories like incoming and outgoing communications?

   These letters would not go to work flow since they are scanned as processed. If we can't get a new doc type then will continue to scan the cancel letters as outgoing communication (these will never be received from a student, only sent by us to a student).
   So I'm thinking we need:

   AD request to withdraw
   AD withdrawal letter
   AD Cancel letter

   Unless there is a reason to keep the categories more broad. Alicia, do you know?

   Patty suggested - Try creating Key word for drop down box listing exactly what document it is what kind of withdrawal, request, cancel etc

   Gregg – have not looked at ro at all or the ad to ro process yet. When do we want to do a test run on the AD to RO. EAS does not know what it is suppose to do. No documentation on AD to RO for EAS.

   Libby Behind the scenes what does the report look for to make the decision to move from AD to RO.

   Looking at matriculation (registered/non registered)

   UAF cleaned files every semester
   UAA cleaned files every 5 years

2. Rodney - I would like to have Image Quality process and the QA Review processed turned on. Need upgrade to system.

   a. Hyland Tech will meet with EAS on Oct 23rd
   b. Hyland Staff/reps will meet with users on Oct 25th

Additional agenda items:
OnBase – OTTC discussion

1. From Jodi - Would notify everyone that add/modify keywords is not a usable function in this version? At this time only re-indexing is currently the only option.
   a. I have an email in to Hyland for them to be more specific about what is not really working with the add/modify keywords function.
b. Gregg - Keywords add/modify – should be doing an autofill but not working in our version. If autofill really needs to be redone you need to reindex.

c. Patty - Do not change receiving campus if you have an adhoc that will do that. What is it that we can change appropriately without an adverse action

2. From Alicia – If thick client seems slow it was suggested to try using thin client it should be faster. Indexing?

3. Foldering – Need to know when you used paper folders for students information what was the order of the documents in the folders?

4. User Group, new doc types – Shelly

   a. Petroleum office – 2 person staff office at u center in anchorage, employers contact them for training. Northslop training cert. All non credit. Lots of records that they are ready to scan in to get rid of the hard copies. Would like to create a grouping for the mining and petroleum office. Past dated things.
   b. Want to track all of this. Has not been put in to banner. All based on grant funding and need to track it.
   c. Will need to involve Ricky, Russ, and David DeWolfe – OnBase is not intended for long term storage system. They will need to know how long the documents is to be in the online system.
   d. Bill Hull – Manager – Putting in documents in to the system now. If we need to keep them indefinitely what will happen- Alicia will move them to a storage system like microfilm, etc.

5. Patty – want to bring on line college of ed. Work with them on what doc. They want to bring in to the system, retention schedule. Will take off line and discuss

**Tasks for next meeting**