

## Support Services Audio - MINUTES

Thursday, August 8, 2013

11:00 – 12:00

Phone: 1-800-893-8850

Participant PIN: 3178 469

- I. Attendees: Sandy, Brian Brubaker, UAA CoE, Linda Hapsmith, UAF, John Osborne – SW OnBase, Derek Bastille – UAF On Base, Jamie Mohr – UAA On Base
- II. Minutes: During our last meeting in March 2013, Patty asked Sandy to fill in as team lead. Since we didn't end up meeting as planned during the BSF2F conference, she suggested we use the agenda from that meeting to guide our work. We also discussed the original intent of the group which was to establish a means to track advising sessions.
- III. Additions to agenda: FERPA training, Referral drop down box
- IV. Old Business:
  - A. Advising Appointment Usage

Per Sandy's guesstimate, there are about 50 "power users" from UAA and UAF using the Banner/UAonline screen on a regular basis. Per Derek, Gary Hagestead of PAIR at UAF is developing TOAD reporting on advising. Linda will check with him and report on what he's doing. Maybe we can use the same TOAD scripts. Linda is interested in better reporting on the data entry.
  - B. Using OnBase for Advising Document Record Retention

Per OnBase gurus it will be possible for advising units to use OnBase but there may be costs for licensing and/or infrastructure (disconnected scanner set up)./ A first step is to complete a Process Request Form which Sandy will do with help from John/Jamie.

Brian states that CoEd at UAA is interested in OnBase and School of Nursing (Marie Sampson) and CTC at UAA expressed interest last year.

It will be an easier implementation for units that can piggyback on another department that is already scanning and indexing (e.g. registrar's office, admissions, fin aid), through file importing, and/or through something called eScan which Brian has and Derek is working on.

Although only a few advising department may move forward on this now, we will need to consult with other advising units on keywords (name, SID, status, term,

## Support Services Audio - MINUTES

Thursday, August 8, 2013

11:00 – 12:00

etc) and document types (incoming correspondence, internship agreement, academic plan, letters of intent) in order to avoid problems later.

### FERPA

Brian would like the UAOnline training package to automatically update PPACERT ZFRP records. He will check with Lora and Mayra to see if this is already in progress or if they are interested in this change as well. It may take a task request.

Next meeting: September 19, 2013 11:00 – 12:00

### Topics:

Process request form for OnBase (Sandy)

FERPA training update (Mayra?, Brian)

Drop down menu for Referral input (Linda)

What is PAIR doing with TOAD? (Linda)