Xtender Team
Meeting Minutes
Monday, June 25, 2007
11:00 am – Noon, CSC 201Y

Present: Lori Henderson, Denise Grinnell, Steve Stellard, Sam Fattore, Charlotte Tetsworth, Jim Lindsey

Absent: Cheryl Cluchey, Joe Riddering, Sandy Britton, Linda Golden, Sara Dew,

1. **Status of Admissions small implementation group**
   <u>**To Dos:**</u>
   - Jim Lindsey need a mapping set up on his work station (and the scanner station) to get past the user and password error message. Sam will take care of today.
   - We need to determine if the Web version requires users to be added to the NT domain. Sam will test today.
   - Anyone using the Scanner client or Application client software will need to be added to the NT domain. Lori will get that list from the submitted Request Forms and communication with Technical Services to get the appropriate users added.
   - Small group testing group is meeting Tuesday, 1-4 pm.
   - Web client training on Wednesday.

   <u>**Modifications to current processes:**</u>
   - Much discussion took place regarding whether or not to implement changes to current Admissions processing to take advantage of the feature in Xtender which will automatically update the Checklist when particular items (ACT and transcripts) have been indexed.
   - The rules have already been setup in DEV4.
   - The greatest concern revolved around student workers indexing items incorrectly. Charlotte recommended modifying who-does-what in the Transcript department.
   - Since the checklist rules in Xtender have not been tested and the procedural changes have not been determined and agreed upon by Enrollment Services management and staff, it was determined that we would <u>not</u> implement the checklist option at this time. Xtender procedures will replicate current Docushare procedures until further testing and discussion has taken place.

2. **Software installation plan**
   - Sam will install the required Scanner and Application software this week on required machines for those who will be responsible for batch scanning and indexing.
   - On Friday night, Sam will switch everyone's user environment from DEV4 to GOLD. [Per Tuesday discussion, this item has been delayed until mid-July per Craig Westman.]
   - For future implementations, the ATS could create a ZenWorks application to remotely install any client software needed. Sam asked if the ZenWorks application could perform individualized configuration for each person's machine. Denise will follow-up on this.

3.   **Migration Plan**
- When Sam returns from vacation, he will migrate all SP08 and forward documents to Xtender. He expects this to take less than 2 days. We will pick a target "blackout date" when he returns.
- The remainder of the data migration will happen throughout the semester; exact dates to be determined.

Future Agenda Items:
- Finance implementation plan and target date (they would like "Really Soon")
- Move Xtender test environment to SAND

Update to these minutes per the Admissions Implementation Group session on Tuesday afternoon at CSS from 1 – 4pm:

- A NT domain account is required for anyone who uses the Scan and Application Xtender software. (It is *not* needed for the Web client.)
- One generic NT domain account will be created for the stand-alone scanning station in CSS.
- It is very likely that the Transcript Team will need to be trained to index documents or that an additional hire will need to be made.
- Additional research needs to be done by Data Security to correct user account access for the scan/indexers.

Implementation / Timeline notes from e-mail conversation with Craig Westman on Tuesday:

- Additional work needs to be done on Enrollment Services policies and procedures (including testing in Xtender) before the staff will be confident enough to implement this out to the academic areas.
- In light of this, the next few weeks will be spent in these discussions internally in CSS and testing in DEV4.
- Live implementation of SP08 and forward in Xtender may not be4 until the week of July 23 or 30 depending on this progress.