Xtender Team
Meeting Minutes
Monday, July 9, 2007
11:00 am – Noon, CSC 201Y

Present: Lori Henderson, Denise Grinnell, Steve Stellard, Charlotte Tetsworth, Jim Lindsey,
Michele Brown, Mallory Straley
Absent: Sam Fattore

1. **Review of Testing Results**
    a. Michele and Mallory need to be able to view scanned docs inside of Banner – as a user would see them. *– assigned to Steven Stellard*
    b. Learn how to append a document for a 2nd or 3rd version. *– assigned to Steven Stellard*
    c. Add a document when the application is attached to the 2nd but the college is listed on the 1st app. *– team determined that a new version of the document would need to be created and attached to the new app. Michele and Mallory will test this.*
    d. Standardize DPI setup for scanning *– assigned to Michele and Mallory; review with Sam*
    e. Learn how to move a document if attached to the wrong student. *– assigned to Steven Stellard*
    f. Determine how to handle "Grades Only" transcript *– assigned to Sam to create necessary custom application in Xtender to store these documents*
    g. Complete final document of Admin Requirements List and Document type – *assigned to Michele; give to Sam to create drop-down tables in Production*
    h. Determine year criteria *– team clarified that the <u>Entry Date</u> would be the determining factor for year criteria.*
    i. Determine how to process documents for people with no SAAADMS record – *team expected that a SAAADMS record is not required to attach a document to a person in Banner; deferred to Sam for clarification.*
    j. Determine technical point person *– team determined that <u>Jim Lindsey</u> would be the point person for all Xtender technical questions.*
    k. Determine who builds files and folders for general documentation *– Sam can build files and folders as necessary*
    l. Written instructions *– on-going by Michele and Mallory*
    m. Determine standardization of scanning and indexing process *– team discussed some common sense procedures to follow. These should be documented by Michele and Mallory and communicated to staff by Charlotte. One specific expectation will be that documents scanned in a day <u>should be</u> indexed that same day. Batch scanning should not be done more than a day in advance.*

> *This is intended to prevent the need for staff to remove physical documents from a scanned batch before it is indexed.*

n. Index the last page of a transcript – *procedures to follow*

o. Procedures for indexing document properly – *Michele recommended splitting the indexing duties up between six individuals, one for each document type:*

  i. *High School transcripts*
  ii. *College transcripts*
  iii. *International documentation*
  iv. *Records documentation*
  v. *Admissions*
  vi. *Miscellaneous documents and Oversight of all scanning and indexing*

  Michele will work with Charlotte to solidify who will do what types of scanning. Recommendations were made by the team to instruct the scanners to label their batches with the name of the person who will be performing the indexing and the date it was scanned.

2. **Current processes:**
   - Charlotte will e-mail the Deans this week with information on Xtender. Charlotte will write up simple instructions for how to use Xtender (synching of password the first time and then subsequent access).
   - Charlotte mentioned the concern that faculty will need to use INB to access Xtender documents. She will talk to Jo about how to handle this.

Submitted by Denise Grinnell