Mark McCulloch

From:	Mark McCulloch
Sent:	Tuesday, October 13, 2020 11:31 AM
To:	Joseph Muennich; Stephen Mosley; Jody Bleisch; Kelly Gossett; Renee Dorjahn; Shaymond Michelson; Stacy Williams-Wright; Carrie Chesbro; Mahnaz Ghaznavi; Catherine Bonomini-Smith; Paula Ellison
Cc:	CJ Nelson
Subject:	Forms Service Advisory Board Meeting Notes 10/12

Hello and thanks to everyone who was able to participate Monday. Here are my notes to share.

In Attendance: Mark, Jody, Stephen, Joseph, Mahnaz, Carrie, Catherine, Kelly, Paula, Renee, Shaymond

1. Joseph and Kelly have been collaborating on On Base integration and have a technical approach to implement. Kelly will initiate a small p project given the document volume and user impact. We will pass significant dates for retention. We will keep documents in forms for reporting integrity and look up through mail links for a year or two.

2. Joseph enhanced timesheet reporting based on Shaymond's request last meeting. Catherine and others expressed appreciation for this enhancement.

3. We decided to host a forms feature overview session.

4. Mahnaz shared need to have trigger based retention rules in On Base based on events such as grant end date, student graduation, employee termination.

5. Mahnaz geeked out asking about forms integrations with O365, analytics/charting. Jody explained how we sometimes use Qualtrics as a front end for forms signature workflows.

6. We discussed the following system enhancements/bugs:

   1. Responsive design
   2. Red Data, could spin of a separate site.
   3. On Base integration for retention. Need to pass along date of origin, date fully executed.
   4. Bundle Copy, generate a blank form with all required fields with push of a button
   5. Drupal encrypted at rest but can't use custom reports
   6. Forms A and B integration My Documents, owners must login, how to get to custom reports on Forms B.
   7. Drupal 9 a year long project. D7 will be supported through November 2022, then extended support. Revisit plan in April 2021. Need to begin project November 2021.
   8. Form invite bug. Needed for participants without UO email.
   9. Integration with O365
   10. Integration with Qualtrics for collecting detailed information up front first.
   11. Integration Analytics charts, and reporting.
   12. Ability to delegate signing authority. Ability to sign as the Dean for example.
   13. Approval of a web page in an iFrame.
   14. Nag email. We need to rebrand this feature.

   This is the beginning of our product roadmap.
   - Red items are in progress.

- Brown items are desired by the advisory board membership.
- Green item is a bug that needs to be addressed.

Joseph created a way for Jamie and other users to search for orphans in My Documents, Pending, click the button "Find documents I have not yet opened in my email account". He will demonstrate this feature during the demo.

If you have other suggested enhancements please share them for the roadmap which Joseph will add to the forms site.

Thanks all.

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Going Remote

From: Joseph Muennich
Sent: Thursday, October 8, 2020 4:36 PM
To: Mark McCulloch <MMcCullo@uoregon.edu>; Stephen Mosley <smosley@uoregon.edu>; Jody Bleisch <jbleisch@uoregon.edu>; Kelly Gossett <gossett@uoregon.edu>; Renee Dorjahn <dorjahn@uoregon.edu>; Shaymond Michelson <shaymond@uoregon.edu>; Stacy Williams-Wright <stacyw@uoregon.edu>; Carrie Chesbro <chesbro@uoregon.edu>; Mahnaz Ghaznavi <mghaznav@uoregon.edu>; Catherine Bonomini-Smith <cbonomin@uoregon.edu>; Paula Ellison <pellison@uoregon.edu>
Cc: CJ Nelson <CNelson@uoregon.edu>
Subject: Forms Service Advisory Board: Agenda for Monday 10/12

Forms SAB Agenda 20201012

Good evening,

The Forms Service Advisory Board meets again on Monday to continue our discussion regarding potential system enhancements with an eye towards developing a product roadmap.

Time: 10a to 11a on Monday 10/12

Agenda:

- Update regarding the OnBase integration initiative (Joseph)
- Update regarding "Viewers Reports" added for the HR upload forms and Timesheet Upload forms (Joseph)
- Question: Would a review of current UO forms features provide a useful context?
- Review initial list of potential enhancements
- Open discussion to extend / refine the list
- Prioritize and group features with an eye to draft a product release roadmap

Reference documents:
1. Forms SAB Minutes 20202.09.03

-- Joseph

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