

## Forms Service Advisory Board Meeting September 3<sup>rd</sup>, 2020

**Attending:** Mark McCulloch, Joseph Muennich, Jody Bleisch, Stephen Mosley, Kelley Gossett, Renee Dorjahn, Shaymond Michelson, Stacy Williams-Wright, Carrie Chesbro, Mahnaz Ghaznavi, Catherine Bonamici-Smith, Paula Ellison

### Minutes:

1. We reviewed the service advisory charter and requested feedback and nominations for additional members.
2. We reviewed the service advisory RACI model and requested feedback.
3. We allowed everyone to introduce themselves.
4. We discussed the need for a signatures solution matrix or wizard explaining for a given use case which service to consider. I'll be working on this with Derek in the service portal [service.uoregon.edu](http://service.uoregon.edu).
5. We discussed campus need to understand alternative forms/signature options available while working remotely. Mark working with Derek on content of service portal page and perhaps Around the O article.
6. We discussed these potential service enhancements which will form basis of a product roadmap:
  - a. Theme updates to improve responsive performance for mobile devices. Transportation has users who have expressed this need. Might lose the familiar visual depiction of signing a paper document.
  - b. Authorization from ISO for use of red data (identifying information).
  - c. On Base integration for retention of all signed PDF files. Critical from a records management perspective. Access to some files (HR related) must be preserved for 50 years. Must overcome access control challenges. Could pass a series number for new document types to OnBase along with relevant dates to trigger retention rules. Could use MS Sharepoint as alternative to On Base if needed.
  - d. Use of "Bundle Copy" to delegate form development outside of the core development team which currently includes Daniel Mundra.
  - e. Encryption at rest for sensitive data elements when stored. Could impact performance and impair reporting. Not as critical once integrated with On Base.
  - f. Ability to scale given expanded campus use. FormsB clone live with a few forms. Working to improve integration between FormsA and B. Now have 200+ document types, over 60,000 documents, DB is using 1 GB/month and climbing, increased demand for support and maintenance.
  - g. Reimplement service for Drupal 9. Must allow 9-12 months for development, testing and implementation once end of support of Drupal 7 is announced. Concern about lack of viable rules module in D9, a central component of the service.
  - h.
7. We discussed current access control applied to documents and document types on [forms.uoregon.edu](http://forms.uoregon.edu) which is limited to submitters, signers and document owners unless an invitation is sent to others.
8. We discussed the difficulty finding a document without employee name in My Documents. Employee name is not part of the universal set of fields available to the My Documents view. Joseph has some ideas about how to address this. He also offered to make a custom report

containing all fields for desired document types, available to all document viewers instead of just document owners.

9. Joseph offered to create a Teams site for sharing minutes and other documents.

Ran out of time to adequately address fixes, enhancements and service roadmap.

Promo

Thanks All