

BDM Pilot Meeting Minutes

February 25, 2014, 10:30-11:30am

Attendees: Pam Grey, Ellen Lyon, Annette Perez, Esperanza Contreras, Susan Malmgren, Ryan Anthony, Deepa Prasad, Linda Koyama

1. The buyers were having difficulty accessing BDM. Susan asked Pam to send her an e-mail so that she can forward it to Joe and Ron.
2. Everyone felt comfortable after the training session with Louis Chen last week.
3. Would like another training session for the buyers in D270; scheduled for **Tuesday, March 18th from 10 am-noon**. Susan will set it up. Now that more and more people are getting involved in the testing, more questions are coming up about procedures and the process.
4. Meeting for March 4th has been canceled.
5. Haven't tested the SSB button.
6. Annette was having trouble when checking "must start in 32 bit mode", it would then ask her if she wanted to restart in 32 bit mode and then application would log her completely out. If you don't check the "must start in 32 bit mode" two blue boxes would appear, and it would pull up all the documents and they aren't labeled (i.e. change order). Need to check with Joe and Ron.
7. The **document types and routing status** will be updated by Ryan:
8. In SSB, users are having trouble displaying documents when they are using wireless network. It could be caused by their pop-up blocker. Pam will try in her office. BDM is restricted to being on site in the district (not real world). Discussed use of VPN for ability to approve PRs when approver is not on campus.
9. Need to open ticket with Ellucian to add another column for doc type for finance. In INB and the web app the user can see both the banner doc type and the doc type. E-mail to be sent to Joe with request to fix.
10. Question why we can't test in PRODN. Displaying documents from INB forms does not work in test because of a problem with single sign-on which should be resolved when Luminus is installed in March.
11. IntelleCheck: Ryan is working on the reports management which will import and index into BDM pdf images of checks. Ron will need to get the scripts ready. Ryan will be finished by the end of the week. Hoping to be ready to test by March 11th.
12. Ryan worked on Merced this weekend and it does load up the BDM documents now.
13. If needed, please submit a ticket for VPN access and request why you need it. Another alternative is to use a remote desktop from the outside to the Yosemite server (on the internet).
14. Annette will test uploading in SSB once it is ready (not a milestone of this pilot).
15. Susan will update the website.
16. Annotations: Can annotate something that has already been indexed? We believe the answer is yes.
17. Check-in/Check-out will not be used. It is a document management feature which is used when there are several versions of a document.
18. Delete privileges: Security class defines privileges. Read only users can only view documents. Read-WriteX users will not be able to delete documents but can upload and index new documents. Primary users will have Read-Write security class which allows them to delete documents stored in BDM.

19. When the user right clicks on an application cabinet, one of the options is Reports. It appears to be disabled. We will determine what it is used for. It allows user to query on TIMESTAMP, DESC and RPTYPE. It is used to store and retrieve queries.