

Clockwork Project Team Meeting Minutes August 25, 2014 1:00 p.m.-2:00 p.m.

Participants: Mary Baddam, Marilyn Booye, San Lu, Lourdes Parent, Chien Shih, Mahmood Hasan, Jim Clow, Ryan Anthony, Linda Koyama

- I. Mary confirmed that she has received the configuration documents from both colleges. Hoping to finish by the target date of 9/30/14.
- II. Log in authentication: Ryan will work with Mary for an LDAP set up.
- III. Outlook sync configuration. Exchange server url and the delegated account that has read and write access to all the staff calendars that they will be sync with. One account for all 50 users total divided among the three databases. San and Marilyn sent a list of staff e-mail accounts (counselors, advisers, interpreters, test proctors) to Ryan. Teresa sent some names also so San will send a consolidated list to Ryan and cc Mary. (8/20/14: Marilyn and San have agreed to a 70/30 split of the licenses as per the PO which would give De Anza 35 and Foothill 15.) Ryan will make an account called "Clockwork" that will have write access to the list of max 50 e-mail accounts. Foothill needs to let Mary know how Foothill will split the 15 between DRC and VRC. Changes in numbers should not be changed often due to required license fees. Jim is requesting a consolidated list from Mary to make sure we are not duplicating info.
- IV. SNTP setting is also needed to send out e-mail. (appointment reminders, instructor reminder). Done.
- V. Banner sync. Mary sent a list of fields being sent from Banner to Clockwork. If the users need other fields, they need to let Jim know by 8/26/14 (Marilyn will provide the Banner fields for Jim). Student info is received real time (under 3 seconds). The data sync will happen every night for course information. (Will be covered in training). For the student data procedure Mary needs the student user name and for the courses procedure she needs the instructor name. Marilyn will send a couple of test CWID's for fall to Jim and Mary.
- VI. For MIS reporting, Lourdes is having difficulty distinguishing services provided to veterans. Linda will set up a meeting for Lourdes, both colleges and Jim. The first phase of this project does not include an upload back to Banner. It would help IR to have everything stored in one place, in Clockwork. Especially need the disability code in Clockwork.
- VII. Data Migration: One-time upload of past disability students: Marilyn found out that FERPA restrictions prevent the release of all the existing disability students names, along with their accommodations and disabilities on an Excel spreadsheet for a one-time upload. ETS can provide a batch file for a one time upload or the DSPS depts. can add students one-by-one, real time. Optional, up to the colleges. Users need to let Jim know how far back to go to extract the info and Ryan will put it on the server for Mary's access. Marilyn will check with the staff to see if they would like the historical data to be downloaded. Need to determine if the historical information is necessary since the student's info will

be brought over real time when the CWID is entered. Mary needs to know as soon as possible if data migration is needed; it is a huge milestone for the project, requires at least two weeks. Foothill is currently scanning paper documents into BDMS. No need to download to Clockwork? Chien would prefer not to duplicate these documents in Clockwork.

- VIII.** Foothill is currently scanning accommodation letter, medical verification, supporting disability documentation, Need to continue discussion regarding BDMS and Clockwork. Clockwork has the ability to scan documents also keyed by the CWID.
- IX.** Forms requiring student signatures that satisfy the regulations of Title V:
- A. Can generate the form in pdf or word format, print it out, have the student sign it and scan it back into Clockwork. (Not the best option if we're trying to go paperless).
 - B. Generate an electronic signature by providing a pop-up message box. Mary will need to consult with the developers to see what is possible and what is the best option . Marilyn sent a workflow to Mary. Will require a custom module, so that they can sign on web. Will need to compile a timeline and cost; Mary will get back to us by 8/29/14. Mary may have more questions from Mary. Must be timed with the launch and finalized configuration of the system. Foothill should be included in the discussion; okay to phase in later or open to possibly include in original launch date.
 - C. Signature pads (Topaz is the commonly used one) can work with Clockwork software by adding templates into Clockworks and having them sign on the signature pad which is then stored in the database in Clockworks (disadvantage of tying to one terminal). (No longer desirable).
- X.** Mary will send the user training materials.