


The 2006 CBORD TPS User Caucus Response

Putting Your Caucus Feedback to Work at CBORD



Thank you to our users who attended the 27th Annual CBORD User Group Conference (UGC) and shared their ideas, thoughts, concerns, and suggestions about both the “state of CBORD” and the “future of CBORD.” We appreciate your time and effort and value your honest feedback. In return, we will consider and apply your suggestions to help improve CBORD’s performance.

The User Caucus is the most important session you attend and helps us achieve our “future state.” Over the years, the caucus process has facilitated many key development efforts, including great new functionality for our users, with more feature-rich systems for us to sell in the marketplace. Thus, the value of the caucus to both your organization and to CBORD can hardly be overstated.

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Top Five [6] Things CBORD Is Doing Well

1. Quality new hires and knowledgeable support staff.
2. Web Clarify is well liked.
3. Innovative, well-developed products and software.
4. User-friendly products.
5. Support follow-ups getting better.
6. Great teamwork approach.

Top Five [6] Things CBORD Could Improve

1. Improve export field names (balances, etc.).

Additional note per UAC meeting: List of output fields in export wizard are NOT user-friendly.

CBORD RESPONSE: We will propose a list of field name changes to the UAC and plan to have the approved changes complete by April 1, 2007.

2. Include instructions for parts and equipment when received by client.

Additional note per UAC meeting: The most prevalent example was the bill acceptor replacement to support the newly released \$10 bill. Other examples include Beyond our Borders (no instructions for how to connect modems, etc.), and 2K simulators for the Lyrics.

CBORD RESPONSE: We will review our current procedures to ensure that all equipment shipped to customer sites arrives with appropriate and clear documentation.

3. Call backs before 5 p.m. (to call back last given number).

CBORD RESPONSE: We will be available to you when you need support. Through aggressive recruiting efforts, we have increased the size of our Support Department by almost 40 percent. We now have 22 full-time Support Specialists on board—up from 16 this time last year—and our business plan calls for adding more. We have redesigned our Odyssey and MICROS training programs. These intensive programs allow new hires to provide quality support sooner. We will continue hiring until we are fully staffed—and we will never stop training. These initiatives represent a significant investment in customer service. We are confident that additional staffing will enable us to deliver the responsive and effective service you deserve.

Our increased staffing levels will also result in faster response times after 5 p.m., as well as throughout the rest of the day.

In addition, we have implemented new procedures to ensure that Support Specialists return phone calls to the correct number, particularly when one has been specified by a customer relative to a specific case.

4. E-Support notes should always be viewable on Web Clarify (they are now, but not consistently).

Additional note per UAC meeting: The example given was that a customer was talking to Faye Dean on the phone, and she was reading case notes that the customer could not see. These may be “for internal use only,” but it did not sound like the case. Another complaint we have received is that a site cannot see cases for the entire site, only the ones for that contact.

CBORD RESPONSE: There is a known bug in the current version of our eSupport software which causes the suppression of case notes under certain circumstances. Our provider has a newer version which fixes this situation, and we plan to roll it out in the coming year.

When querying cases, there is a selection: “At Site” or “Jane Doe” (name of logged-in user). Choosing “At Site” will allow eSupport users to view all cases for their site.

5. Would like to have (at the very least) annual onsite visit from the sales representative.

a. More face-to-face interaction, especially if/when we get a new account representative (representative should not simply stop by “just to chat”—he/she needs to come prepared/understand what the client currently has and when to suggest any necessary/foreseeable software or peripherals upgrades so that the client can prepare capital equipment request etc.).

CBORD RESPONSE: We are in the process of restructuring our Account Management team to be able to more effectively serve our customers. It will be our expectation that every customer receives no less than one annual visit from his/her Account Manager.

b. Should also be able to assist client with any questions and/or issues.

CBORD RESPONSE: We provide ongoing training to account managers so they can assist customers. Your Account Manager will assist you with any questions you have or guide you to someone who can.

c. When client logs online, would be nice to have each sales representative’s photo & contact information accessible.

CBORD RESPONSE: We are currently making plans to rewrite our websites, including the client-only website. We will add this feature to the new site.

6. If the system is upgraded, make sure the system users are well trained and comfortable with the product before the installers leave.

Additional note per UAC meeting: The customers will pay to have the installer stay longer. Also, we should be onsite for full days, not arrive/leave at noon on first/last day. CBORD needs to do a better job of managing expectations.

CBORD RESPONSE: Our Support Specialists are trained to do whatever is necessary to complete their work successfully and on schedule when they are onsite for installations and trainings. We schedule adequate time for user training but there are cases where the installation and training program falls behind schedule. In such cases, Support Specialists will work with the customer and CBORD management to develop a contingency plan to ensure that users are well trained.

In addition, Support Specialists who travel by air will book the last available flight on the last day of the job.

❖ Definitely supervise upgrades by an experienced installer whenever CBORD performs upgrades remotely!

CBORD RESPONSE: We will make sure that remote upgrades are always performed or supervised by an experienced installer.

Additional note per caucus clarifier session: When new enhancements are added, they need to be added to the training instructions as well. Also, notification to existing clients beyond the release notes.

CBORD RESPONSE: The bi-monthly eNewsletter provides a detailed view of important new enhancements to the Odyssey PCS platform beyond the details described in the release notes. To sign up for the eNewsletter, visit the client portion of the CBORD website at www.cbord.com, login, and click on the CBORD eNewsletter link. In addition to the eNewsletter, TPS Manuals and How-To Guides are available for download that describe operational details of the Odyssey PCS system. We will fully rewrite the Odyssey PCS User’s Guide by June 30, 2007 (to bring it up-to-date with current system capabilities).

Top Five [9] System Enhancements Requested

1. Ability to email the results of scheduled reports automatically.

Clarification: The Director’s View allows a non-Odyssey user to view PDFs of Odyssey reports. However, it is limited to 5 and not convenient for running reports on demand. Customers would like the option to select an email recipient as an output option when running a report.

CBORD RESPONSE: We will support the capability to email certain reports no later than April 1, 2007. Be aware that some report formats will not support this (Patron Statement is one example).

2. Ability to designate payment type in a batch (check release notes—want to see payment type and history view).

a. Add the ability to select payment type when running a batch and add to balance.

CBORD RESPONSE: We will add this capability by April 1, 2007.

b. Add the ability to include payment type in DTP/ODBC import process so all deposits can be tracked.

CBORD RESPONSE: This is supported in Odyssey 3.3.1. The payment type data should reside in the ID_2 field. We will update our documentation with the release of Odyssey 3.5.

c. Add the ability to see the payment type in the Patron History view and report.

CBORD RESPONSE: We will add this capability by April 1, 2007.

d. Add the ability to select on payment type when running Central Office Log reports.

CBORD RESPONSE: We will add this capability by April 1, 2007.

e. Include payment type for each transaction in Central Office Log Detail report.

CBORD RESPONSE: We will add this capability by April 1, 2007.

f. Add to database views.

CBORD RESPONSE: We will add this capability by October 1, 2006.

3. Daily reconciliation report with included POS totals on same report.

Clarification: This request is for MICROS only.

CBORD RESPONSE: We will enhance the Daily Reconciliation Report to include MICROS totals by April 1, 2007.

4. Ability to check equipment in/out on card readers (Lyrics/Epics and Troubadours). Standalone, without UI.

Clarification: In addition, it would be good if the Troubadour could scan the equipment being checked out.

a. Secure through UI to make separate screen for equipment check in/out so that user can only view that screen (and not the general or any other tab).

CBORD RESPONSE: We will not add the capability to process equipment checkout activities to any devices at this time. However, we will develop a secure solution to use a PC for activity transactions, including equipment checkout, by July 1, 2007.

b. Have ability to log offline activities from a Lyric/Epic.

Clarification: We are doing this already with the Epic, investigating adding to Lyric.

CBORD RESPONSE: As of Odyssey 3.4, it is possible to log offline activity transactions from an Epic or Troubadour. We will not add this functionality to the Lyric.

5. Ability to run transaction exports for activities (also add grand subtotal/summary page on reports).

a. Transaction Export should subtotal by terminal, and then grand total at the end. The exports that have been tried are not accurate because the amount fields are not lined up correctly and are formatted strangely.

CBORD RESPONSE: We will fix the Activity Transaction Report by April 1, 2007 so that when it is exported to Excel, the amounts line up properly.

b. Add the ability to run a detailed or summary report.

CBORD RESPONSE: The Activity Transaction Listing report provides detail. The Activity Counts report provides a summary.

c. Add the ability to run report that selects by activity group.

CBORD RESPONSE: We will add the capability to select on activity group by July 1, 2007.

d. Customers would like to see better voting activities. Odyssey should track the tally (who voted for what).

CBORD RESPONSE: We will not add the capability to track voting results in Odyssey PCS in fiscal year 2007.

6. More accurate view of the UI from the TP for online/offline status of the terminals and connections.

Clarification: Vending terminals are the main problem. We need to come up with a better way of identifying offline vending terminals.

CBORD RESPONSE: We believe we have made great strides in improving the VFEP service's capability to report offline terminals. The TP reports accurately on the online/offline status of the new IP addressable vending equipment. We will work with the manufacturer to see if we can identify machines that are online but out of order. We will also investigate new options to identify vending terminals that are in a state other than online. One idea includes providing a report that lists terminals where no sales have occurred in a user-defined date range.

7. The ability to get shared attributes for PCS and HMS.

Clarification: These should be user-configurable since all attributes should not be shared. Also, shared attributes between PCS and ID Works. Why should users have to define/maintain/update shared attributes in two places?

CBORD RESPONSE: Unifying PCS and HMS attributes would be a major undertaking, one that would prevent us from delivering many of the other caucus requests for both PCS and HMS. We will not support shared HMS and PCS attributes at this time.

8. Undo feature for card numbers that may have been accidentally edited/deleted (when set up for non-duplicate card numbers, ability to search history of a change card number/modified card). Show card history on readers.

a. Identify former cards from readers, registers or Lyrics.

Clarification: Customers want their cashiers to know specifically if it's a previously issued card. In the case of ISO numbers, errors at the terminals do not indicate that it's a reissued card. For CBORD Standard format, the cashier sees "invalid card number."

CBORD RESPONSE: For ISO card numbers, cashiers should be instructed that "not on system" means there is a problem with the account. It is not possible for the cashier to elaborate on what the problem may be, but he/she can instruct the patron on where to go for help.

b. Add ability to track card changes—history of the patron's previously used card. *Clarification: Customers want the ability to see what card numbers were previously used by a patron. An example given was that you can see a card was swiped in the Checker's Log, but you have no way of knowing whose card it may have been.*

CBORD RESPONSE: We will add a new report that will allow the user to enter the patron ID number and date range to see that patron's previously used card numbers. It will also allow the user to enter a card number and date range to see what ID numbers have used the card number in the past. This report will be available by April 1, 2007.

9. Electronic notification from Odyssey server when system/services go offline (ability to get email when task fails-get instructions to fix).

a. Notification if the TP is not responding

CBORD RESPONSE: We corrected the underlying problem in Odyssey 3.0. If the TP service is running, it will respond.

b. Notification if any of the Odyssey services are not running

CBORD RESPONSE: We will provide documentation for IT staff to implement a third-party tool that will monitor the status of Windows services.

c. Notification if any of the Odyssey services are restarted

CBORD RESPONSE: We will provide documentation for IT staff to implement a third-party tool that will monitor the status of Windows services.

d. Notification if a location goes offline.

CBORD RESPONSE: We will not provide a solution this fiscal year. We will, however, investigate options to improve reporting of offline vending terminals as stated in number 6 (above).

e. Ability to be notified via phone, email, text message.

CBORD RESPONSE: We will provide documentation for IT staff to implement a third-party tool that will monitor the status of Windows services. These tools may also support the capability to send phone, email, or text messages.

f. Recommendations for third-party tools to help with services is acceptable.

CBORD RESPONSE: We will provide documentation for IT staff to implement a third-party tool that will monitor the status of Windows services.

g. Sending an email when a task fails already exists, but enhance to include stalled tasks (more than 15 minutes, half an hour).

CBORD RESPONSE: We will add a success/fail column to the default grid in the Scheduled Task menu option by April 1, 2007. That will enable the user to get a snapshot of the most recent outcome versus checking the task history of each.

MICROS-Specific

1. Cancel transactions after a partial tender is initiated.

CBORD RESPONSE: We will not implement this item because operationally we believe it is risky to accept payment and then allow a cashier to cancel that payment. Completing the transaction as an over-ring to some other tender is the proper procedure.

2. Void by transaction number instead of item number.

CBORD RESPONSE: MICROS has stated that it is not possible to implement this item.

3. Customer account number on the journal receipt of a split tender transaction when cash involved.

CBORD RESPONSE: Version 8.0.01 of the SIM reports the patron card number in the journal (regardless of whether the transaction was partially or fully paid). Version 8.0.01 is currently available for sites running Micros 3700 version 2.6 service pack 6 to Micros 3700 version 4.0.

4. POS configuration and reporting—would like to print setup tables and report any information in the POS configuration tables.

CBORD RESPONSE: It is possible to print this information from the database table directly. Please contact TPS support for instructions.

5. The option to consolidate two or more Revenue Centers into one report. Example: organization has a coffee bar with five locations and five Revenue Centers. They have individual Revenue Centers but would like them consolidated as well.

CBORD RESPONSE: This capability will not be added to the MICROS 3700 product line.



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Alternate
Open

Top Five Things CBORD Is Doing Well

1. Positive communication with staff; implementation.
2. Diverse applications.
3. Support of products.
4. Development and implementation of future products (i.e. Webfood).
5. Implementation coordinators are helpful.

Top Five Things CBORD Could Improve

1. Concern about the future support in timely manner.
2. Support call-back/response time (especially after 5 p.m.)—email has faster response.
Additional note per UAC meeting: Support representatives are still not using the cell phone number given by customers when they leave a message.

CBORD RESPONSE: We will be available to you when you need support. Through aggressive recruiting efforts, we have increased the size of our Support Department by almost 40 percent. We now have 22 full-time Support Specialists on board—up from 16 this time last year—and our business plan calls for adding more. We have redesigned our Odyssey and MICROS training programs. These intensive programs allow new hires to provide quality support sooner. We will continue hiring until we are fully staffed—and we will never stop training. These initiatives represent a significant investment in customer service. We are confident that they will enable us to deliver the responsive and effective service you deserve.

Our increased staffing levels will also result in faster response times after 5 p.m., as well as throughout the rest of the day.

In addition, we have implemented new procedures to ensure that Support Specialists return phone calls to the correct number, particularly when one has been specified by a customer relative to a specific case.

3. Uses for and implementation of Odyssey software, as well as how to.
Additional note per UAC meeting: Account Managers should keep in touch with customers to inform them of new products and help them expand their system.

CBORD RESPONSE: We are in the process of reviewing our Account Management team with the target result being our ability to more effectively serve our customers. It is our intent to have a minimum of a phone contact twice per year and an onsite visit from the appropriate Regional Account Manager every year when possible. We are providing ongoing training to Client Development Group Representatives and Regional Account Managers so they can assist customers remotely or during onsite visits. Your Client Development Group Representative or your Regional Account Manager can assist you with any questions you have or guide you to someone who can.

4. Training materials; more eSeminars; daily procedures to justify manpower.
CBORD RESPONSE: We are currently developing eSeminars on Patron Administration and Reports. We also plan to create a report reconciliation eSeminar. Periodic procedures are difficult to document since they vary by site. However, we will come up with a template to use that can be updated by the system operator. We plan to deliver each of these requests by December 31, 2006.

5. Information on what future products can be utilized.
CBORD RESPONSE: Our eNewsletter will continue to inform you about new products and provide you with a wealth of ideas. Additionally, we publish periodic press releases that describe how customers are using CBORD products to enhance their systems.

To read the eNewsletter, visit <http://www.cbord.com/enews>. You will be prompted to give your client login/password information. Can't access the page? You may not have a login/password. Visit <http://www.cbord.com/signup>, or email adm@cbord.com for help.

Top Five System Enhancements Requested

1. MICROS and Odyssey do not have linked reconciliation reports.

Clarification: Enhance the daily reconciliation reports to automatically get the MICROS totals.

CBORD RESPONSE: We will enhance the Daily Reconciliation Report to include MICROS totals by April 1, 2007.

2. Estimate labor times; operations.

Clarification: CBORD should help customers figure out the time requirements to be the system administrator for their system.

CBORD RESPONSE: Procedures are difficult to document since they vary by site. However, we will come up with a template to use that can be updated by the system operator. This template should assist with estimating labor times. We plan to deliver this by December 31, 2006.

3. Can CBORD predict staff commitments?

Clarification: Related to 2 (above): customers want help understanding the time that is involved in running their system effectively.

CBORD RESPONSE: Periodic procedures are difficult to document since they vary by site. However, we will come up with a template to use that can be updated by the system operator. We plan to deliver this by December 31, 2006.

4. MICROS date stamp (if you are running reports and want to go back and re-run a new report, you have to re-enter the dates).

Clarification: A refresh button on the MICROS print preview screen would be ideal. This would enable the user to easily change the date criteria without also re-selecting the rest of the criteria.

CBORD RESPONSE: Currently, when a MICROS report is previewed on screen and then closed, the selection criteria remains as previously selected.

5. Automated eNewsletter emails (signup).

Clarification: It is unclear how new customers get on the list to receive the eNewsletter. They need to be able to sign up easily to receive it. They like the idea of selecting from a list of email notification categories, including the eNewsletter, from their profile.

CBORD RESPONSE: Originally, the eNewsletter was sent out to all clients with an opt-out option. We are looking into the possibility of "selecting from a list of email notification categories." The logistics of this are being reviewed. If this is released, we will be sure clients are aware of the process.

To read the eNewsletter, visit <http://www.cbord.com/enews>. You will be prompted to give your client login/password information. Can't access the page? You may not have a login/password. Visit <http://www.cbord.com/signup>, or email adm@cbord.com for help.



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Top Five Things CBORD Is Doing Well

1. Ben's availability, response, and follow through.
2. Innovation of product.
3. Release notes—clear explanations on updates and fixes.
4. Listening to customer requests.
5. CBORD.com/website information.

Top Five Things CBORD Could Improve

1. Installs. If upgrading, make ALL of it pushable!

CBORD RESPONSE: We will modify the install software to correctly support push-based upgrades without requiring uninstall of existing software. This capability will be available on or before April 1, 2007.

2. Availability of remaining support staff (need more in-house support for immediate attention).

CBORD RESPONSE: We have and will be making a number of changes in our current support practices over the next year, including:

- A Project Manager was added to handle custom web-related projects (single sign-on, online deposits, etc.). This person deals directly with the client and our development group throughout the implementation process—giving the current HMS Support Representatives more available time to respond to incoming client calls.
- Call routers now answer all incoming calls (our clients must use the 607-330-7588 support number). The routers create cases immediately, thus streamlining the process of responding to incoming calls.
- eSeminars will be created on two topics—Advanced Find and Automatic Assignments—that users can review at their convenience. The seminars will be designed as tutorials, but they can also be accessed at any point so users will be able to find answers to specific question quickly. The eSeminars will be available by July 20, 2006.
- The installation and upgrade process will be streamlined, thus reducing the amount of time that is needed from a Support Representative to complete the process and allowing more Support Representatives to be in-house to respond to client calls. This process will be in place on or before April 1, 2007.

3. Documentation. Too often, a call is made to get documentation for simple stuff, accurate, and screen shots/code samples.

CBORD RESPONSE: As part of our efforts to supplement onsite training, eSeminars will be available for Automatic Assignments and Creating an Advanced Find by July 15, 2006. If these are received well, we will create eSeminars for other Odyssey HMS topics in the coming year. We will continue to correct documentation inaccuracies as they are reported.

4. Communicating bugs/fixes and updates to all clients.

CBORD RESPONSE: We have reinstated the process of notifying all clients via email of any bugs that are found in the Odyssey software that could affect use of the product. These notifications will include a description of the problem, the version of the software that is affected, our proposed solution, as well as any workarounds that may exist.

5. Support acknowledging that issues are more for development. Also, have set procedure for what happens once an issue has been passed to development (support to be main point of contact—and use eSupport).

CBORD RESPONSE: Support and Development work as an integrated team when issues arise with the Odyssey software and during the process of resolving those issues. Support will work closely with the client to ensure we have a thorough understanding of the problem and will stick with the case until it is resolved.

Top Five System Enhancements Requested for HMS

1. Allow direct look-up of residents by last name, first name, Alternate ID, or combination.

CBORD RESPONSE: This is implemented in Odyssey 3.4 scheduled for general release in Summer 2006.

2. Enhance email capabilities (allow attachments).

Clarification: Some institutions view email as “official” means of communication with students, so it has been used more.

CBORD RESPONSE: We will address this item in a number of ways:

The new Contact Management module will provide capability to use email attachments for contact with students.

We will be adding Judicial Email Notification as an enhancement; during the course of this work we will look at how to integrate easy-to-use email capabilities into the Judicial workflow, which may tie into Contact Management functionality. Contact Management is available with Odyssey 3.4 scheduled for general release in Summer 2006.

3. Advance Find—“Display Values On” should change when search range changes in Saved Advance Finds.

Clarification: It is easy to miss when updating an Advanced Find default to first day of search range is fine.

CBORD RESPONSE: This has been implemented in Odyssey HMS version 3.3, available now.

4. Ability to delegate user security by group.

Clarification: Ability to have multiple user admin and allow them to control access rights to their group of users. System admin can control anyone. Users are controlled by only one group admin. For now, admin has access to all modules.

CBORD RESPONSE: This will be available with Odyssey 3.5 scheduled for beta release in Summer 2006. The user that has access to the User and Security module will have access to users and user groups through filters. The user will be able to set any access rights for any user or group to which he/she has access.

5. Ability to import Emergency Contact information.

CBORD RESPONSE: This is implemented in Odyssey 3.4 scheduled for general release in Summer 2006.

Top Five System Enhancements Requested for Financial Transactions

1. Customize patron gender.

CBORD RESPONSE: We will add support for more gender values by January 1, 2007.

2. Web Module:

a. Test will not transfer/copy to production.

CBORD RESPONSE: Please contact HMS Support for assistance with this process.

b. More flexibility to customize web homepage (ability to add text to term section, update above and below assignment selection, ability to customize, separate home pages for groups).

CBORD RESPONSE: We will add the ability to customize text in more places on the home page. We will not provide separate home pages for different groups because this is a significant change to the WebStudent implementation that will take time away from other requested system enhancements.

c. Single room buyout on Student Web (room selection).

CBORD RESPONSE: We will not implement this item because we must dedicate our available time to other enhancements, such as the FT revisions described on this response.

d. Modifiable web staff page like the student webpage (ability to customize-tree look).

CBORD RESPONSE: We will add a couple of “free-form” patron pages to the Staff website by April 1, 2007.

e. Cross-term functionality in room selection criteria (access to student room history/re-register for same room/set criteria by date—give option to “copy” assignment of room).

CBORD RESPONSE: We will not implement this item because we are committed to other enhancement requests received from individual clients and work on the new system.

f. Suite level assignment—room selection (ability for one person to assign himself/herself and others to a specified room).

CBORD RESPONSE: This capability already exists in the Select Room functionality for mutually requested roommates in Odyssey 3.1 and higher. Please contact Support for assistance.

3. Proration:

a. Automatic charge and credit proration for all contract items/recognize holiday and break schedule.

CBORD RESPONSE: We will implement revisions to fully enable automated charging and proration by January 1, 2007.

b. Charge schedules with start dates (give option to keep charge list schedule from charging “back” —want to keep current schedule type for proration and new arrivals/reoccurring schedule).

CBORD RESPONSE: We will add an option to prevent charge list entries with dates prior to the assigned date from generating transactions on the student account by January 1, 2007.

c. Create a holiday schedule for each term, asset type, and facility (automatic proration—by term or asset type, i.e. apartment).

CBORD RESPONSE: We will implement support for holidays and breaks along with changes required for caucus item 3-a.

d. Import Charge Schedules.

CBORD RESPONSE: We will implement the capability to import charge schedules by January 1, 2007.

4. Judicial:

a. A working link to patron or add patron age, place of residence, and place to select at Incident screen.

CBORD RESPONSE: We will add these fields to the Incident form by October 1, 2006.

b. Be able to access Judicial meeting notes in Advanced Find or canned report.

CBORD RESPONSE: We will create a report for this information by October 1, 2006.

c. Judicial for guests with system generated ID (patron note alerts—give options for set-up).

CBORD RESPONSE: We will not implement this item because we are committed to other enhancement requests received from individual clients and work on the new system.

d. Develop way to multi-assign processes and sanctions when several students are involved in the same incident and require stand sanctions.

CBORD RESPONSE: We will implement the capability to multi-assign sanctions by October 1, 2006.

e. HMS Judicial—decrease steps by adding ability to work through event processes on incident screen.

CBORD RESPONSE: Step reduction will occur as a byproduct of items a, b, and d.

f. Pop-up alerts indicating if a student has a prior judicial history when entering new judicial information (patron alert notes/notes pop-up in Judicial).

CBORD RESPONSE: We will implement the capability for patron note alerts to pop-up in Judicial by January 1, 2007.

g. Mass closing of Judicial cases.

CBORD RESPONSE: We will implement the capability to mass-close Judicial cases by April 1, 2007.

h. Develop way to auto-generate emails (instead of letters) to patrons from HMS Judicial to summons a student.

CBORD RESPONSE: We will implement email generation from Judicial by January 1, 2007.

i. A check box for status of sanction.

CBORD RESPONSE: We will add an additional “On Hold” Sanction status to address this item by April 1, 2007.

5. Search Ability:

a. Search for facility like patron name search (drop down box).

CBORD RESPONSE: We will not implement this item because we are committed to other enhancement requests received from individual clients and work on the new system.

b. Search box should match student display/page refresh pop-up search box like CS Access (stronger indicator on who you are searching—clearing search box).

CBORD RESPONSE: We will adjust the behavior of the search area at the top of patrons to make it clear who is being viewed by January 1, 2007.