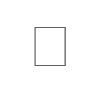
**Transcript**

19 January 2024, 03:01pm

 **Nkutu, Faisal** started transcription

 **Faulds, Jamie** 0:14  
Hmm, OK.

 **Nkutu, Faisal** 0:14  
There's a most amount for me, yes.

 **Faulds, Jamie** 0:17  
Yeah.  
So let me let me share my screen.  
I can show you a high level document and then I can kind of probably find that that detail information you're looking for.

 **Nkutu, Faisal** 0:24  
OK. Thank.  
I'm good.  
Thank you.

 **Faulds, Jamie** 0:33  
So.  
Based on my knowledge, I believe we only have one interaction with Kiss and it's it's a process that we call an autofill.  
Basically it's a lookup table in in on base that we use to to populate.  
Automatically populate data for for on base, so I don't know if you want me to give you a bit of a background of what on base is or are you familiar with it.

 **Nkutu, Faisal** 0:59  
Yes, I I want the background of what on this is, that is something I missed telling you.

 **Faulds, Jamie** 1:03  
OK, so so on base is uh, it's an image and workflow system.  
So it on base holds for IWIS all the documents, the raw documents that are coming in.  
So whether it came into a says paper, it gets scanned into on base.  
If it's like an email, it comes in on base and we store the document.  
So like a PDF or a TIFF, we store those in in on base.  
So as an example, if you reached out to your advisor and said, hey, I wanna do an address change, that address change would come through and we would get the physical document that you filled in to change your address.  
We store that in on base, OK, and then it's it's available to be looked up if required and it it makes its way into a work flow and then that workflow it would on base takes care of based on the workflows setup where that document goes to actually be processed by by one of the business users.  
So whether it's an address change or whatever, a policy change redemption, that's kind of the flow for Iowa.  
I asked some of a document comes in, it gets pushed through a a process of scanning triage and then to the eventual and user team.  
So as an example, we're using for wealth dot documents.  
We do some lookups from kiss.  
Umm.  
So in that case the document comes in, it gets ingested, so it has the we have a it within the start of the workflow, they have a screen where they and put in key information.  
So in this case they probably are looking up a a plan.  
And on base goes out to a table that has information, in this case from Quadrus and Kiss looks it up to find who.  
That that client is and some pertinent information around the policy or the so we have this process that's on the screen of ETL goes out and grabs information from Kiss, grabs.  
Information from Quadrus pulls it together and populates it into on base so we can use it as a lookup.

 **Nkutu, Faisal** 3:35  
Sounds good.  
Do you use anything to do something similar to, you know, uh sorry.  
Machine called Captiva for the for document capture.

 **Faulds, Jamie** 3:47  
So we're we're not using that on on base it's does the the document capture.  
So essentially there's there's few ingestion points, so on base can go directly to an exchange, uh, mailbox, and pull information in.  
It gets scanned through the scanners in the mail room and gets dropped to a file location and on base has a process they call an XML dip.  
So it it the XML dip is the image document and it's an XML file that has the key data from that that document and that that's used in the indexing process.  
And then there's another process where it just scans in the document and we call that a sweep.  
So it's sweeps the document into on base, but then the users have to go in and index that document themselves.  
That's, that's where these auto fills.  
And this process kinda comes into play.

 **Nkutu, Faisal** 4:49  
Ohh sounds good.  
Thank you for that explanation.

 **Faulds, Jamie** 4:53  
Yeah, no problem.  
So so this this is kind of the high level flow of how it it gets to us.  
I do have a I requirements document that lays out all the fields that are being used from kiss and the tables.

 **Nkutu, Faisal** 5:10  
Excellent.  
That's good.

 **Faulds, Jamie** 5:13  
Yeah.

 **Nkutu, Faisal** 5:13  
Yeah, that'll be beautiful.

 **Faulds, Jamie** 5:13  
So I can forward that on to you.  
Ohh I just.

 **Nkutu, Faisal** 5:16  
Thank you very much, Jim.

 **Faulds, Jamie** 5:17  
Just got to grab that from where we have it stored.  
Get a note here.  
So is there a timeline for the move to MDM or you just doing the the initial legwork here?

 **Nkutu, Faisal** 5:42  
Yeah, I'm doing the initial legwork and the teams are going to like your team on other teams are going to be determining what time or they want to start moving into to MDM.

 **Faulds, Jamie** 5:50  
OK.  
Uh, OK.

 **Nkutu, Faisal** 5:58  
Together with Project management team.

 **Faulds, Jamie** 6:02  
OK.

 **Nkutu, Faisal** 6:03  
No.

 **Faulds, Jamie** 6:06  
Uh, do you have any other questions?  
I'll try to find that while we're talking, but.

 **Nkutu, Faisal** 6:11  
Uh, no.  
So basically, those were the things, the high level, some matter which you have given me of the business process and here you have given me a sequence diagram.  
Uh.  
Which I'm going to kind of try to do it in a in it in it can change it a little bit and give you what I my observations are out of this and then.

 **Faulds, Jamie** 6:32  
OK.  
Yeah.  
Let me share this with you.

 **Nkutu, Faisal** 6:35  
Right.  
Thank you.  
And then you said you're gonna give me the fields.  
Basically, those are the three things that I needed from you.

 **Faulds, Jamie** 6:42  
Uh. Perfect.

 **Nkutu, Faisal** 6:44  
You know, and if there's nothing else.  
Uh, and this is over.  
Then I can give you back another 22 minutes of your time.  
If I you know that don't.

 **Faulds, Jamie** 7:00  
OK.  
So there that's shared.  
Yeah.  
And I'll find that the requirements document and send that along to you.

 **Nkutu, Faisal** 7:09  
OK.  
OK, you don't use any mesh API anywhere.

 **Faulds, Jamie** 7:15  
Ohm.

 **Nkutu, Faisal** 7:20  
I don't see a name.

 **Faulds, Jamie** 7:20  
We uh, not in this process for new business.

 **Nkutu, Faisal** 7:26  
OK.

 **Faulds, Jamie** 7:26  
We have some mesh processes but I.  
Not that I, as far as I know, it's not connecting to to kiss.  
It's we're just sending on data to to new business.

 **Nkutu, Faisal** 7:41  
But it always sometimes called NBN.

 **Faulds, Jamie** 7:45  
No new business is an insurance.  
Product.  
So when when a you have a yeah.  
For as an example, when you go to apply for insurance, like an insurance policy, they need to, they might have a request for you to get blood work.  
So we have a an interface that goes out to the vendor with the request and then the vendor sends it back.

 **Nkutu, Faisal** 8:07  
But.

 **Faulds, Jamie** 8:14  
So it's it's like a medical information coming back, but that goes into the new business application and an aura.  
And I don't think it has any from an on base perspective.  
I don't think it has any integration with Kiss.  
Maybe new business does, but uh, we tilt.

 **Nkutu, Faisal** 8:34  
Welcome.  
OK.  
Yeah, that's fine.  
Thank you.  
Yeah, that's all I needed from you, Jamie.

 **Faulds, Jamie** 8:41  
OK.

 **Nkutu, Faisal** 8:41  
Thank you for your time. Yeah.

 **Faulds, Jamie** 8:42  
I'll.  
Yeah, I'll find that document and and forward it on to you, yeah.

 **Nkutu, Faisal** 8:46  
OK. Thanks.  
Have a good day.

 **Faulds, Jamie** 8:50  
OK. Thanks.

 **Nkutu, Faisal** 8:51  
I'll give you a summary of what I understood.  
So for your review.

 **Faulds, Jamie** 8:55  
Her correct.

 **Nkutu, Faisal** 8:56  
Yeah, yeah, yeah.

 **Faulds, Jamie** 8:57  
Yeah, that's good.  
Sounds good.

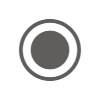
 **Nkutu, Faisal** 8:59  
Thank you.

 **Faulds, Jamie** 9:00  
OK.  
Talk to you later.

 **Nkutu, Faisal** 9:01  
You don't buy but.

 **Faulds, Jamie** 9:02  
Alright bye.

 **Faulds, Jamie** left the meeting

 **Nkutu, Faisal** stopped transcription