User Group Goals

- **Communicate & Share Ideas with Others**

  - Discuss What Works / Best Practices

  - Discuss Common Problems & Issues

  - Coordinate Efforts between Offices

  - Share Knowledge & Coordinate Training

- **Promote use of Perceptive Content across campus**

Today's Agenda

- Introductions & Office Updates

- Participating Office Review

- Recap of Recent Upgrade

- Topics Discussed at NDUS Liaison Meeting

- Preparing for Annual Document Purge

- X-drive Resource Updates

- Your Questions

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Participating Offices

- Admission
- Advising Resource Center
  - Professional Advisers
- Customer Account Services
- Enrollment Management
- Facilities Management
- Financial Aid & Scholarships
- Graduate School
- Human Resources/Payroll

- Institutional Research
- International Student Services
- IT Services
- One Stop
- Provost
- Registration & Records
- Residence Life
- Teaching & Learning

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Upgrade Recap

- **Fall 2017 (version 7.2)**
  - Automatic Update was not immediately applied
    - May want to have users leave computers on overnight next time
  - Ability to Print to ImageNow Printer in Color
    - The "inowprint" file was replaced during the auto-update

- **Next Updates**
  - Spring 2018: May 1-2 (Tuesday-Wednesday)
  - Fall 2018: November 14-15 (Wednesday-Thursday)

Liaison Meeting Topics

- Submitting Help Tickets in new system

- Annual User Assessment
  - Begins in January (will be conducted in Blackboard)

- User Security Reports
  - Monthly = Drawer, Global, Security Groups
  - Quarterly = Annotations, Application Plans, Views, Workflow Queues

- Version Control

- TransForms

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Annual Document Purge

- Automated Retention Manager is not currently set up for NDSU

- Power Users will be receiving listing of document types
  - Will have to complete spreadsheet columns for:
    - Record Control Number
    - Record Series
    - Retention Period
    - Office of Record
    - Disposal Method

- Review Delete Process manual on NDUS SharePoint site
  - Support Resources > How to > Purging and Retention

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X-drive Resources

- **New "Power Users" folder has been created**

- "Security Reports"
  - Includes reports for all departments
  - Helpful when users belong to security groups in other departments

- "Workflows"
  - Includes workflow diagrams and routing rules

- Custom Properties spreadsheet

- Group Security Matrix

X-drive Access

- **New procedure for adding/removing X-drive access**

   1. Contact a Campus Liaison (A.J., Viet, Nate)

   2. User will be manually granted permission to drive

   3. 10-15 minute delay for processing

   4. Computer restart is recommended

   5. Contact NDSU IT Help Desk if drive does not appear for user

Questions???

Thank You!

FOR MORE INFORMATION:

Contact A.J. Klein at 1-7983 or andrew.j.klein@ndsu.edu

or

Visit the NDSU Document Imaging website at www.ndsu.edu/imaging

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