

NDSU NORTH DAKOTA
STATE UNIVERSITY

ImageNow User Group

June 12, 2018

STUDENT FOCUSED • LAND GRANT • RESEARCH UNIVERSITY

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
- Annual Audit
- Retention & Purging (Demo)
- Index Key Relocation Project
- Statewide TransForm Update
- Outage Calendar for 2018-2019
- Perceptive Contract Renewal Discussion
- Your Questions

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
- Potential Additions → Bookstore & Nursing*

Annual Audit

- Deadline to submit via Qualtrics = **Friday, June 22**
 - Submit an audit for each drawer “owned” by department
 - Submit an audit for each drawer “shared” with another department
- Questions???
- ND State Auditor request for audit of Document Imaging User/Roles
 - Hoping to submit monthly security group reports
 - Please review “Group Member List” report to confirm valid users

Retention & Purging

- Automated Retention Manager is not currently set up for NDSU
- Tickets have been submitted for EM & IR departments
 - File plans were submitted March 21st
- “Document Types & Retention” spreadsheets on X-drive
- Review Delete Process manual on NDUS SharePoint site
 - Support Resources > How to > Purging and Retention
- DEMO

Retention Purge DEMO

1. Open Deletion log
2. Click on “Retention” tab at bottom
3. Open “Documents” view in Perceptive
4. Create new private filter to search for purge-able documents
 - **NOTE:** make sure search includes “Workflow queue is blank”
5. Add/Remove/Arrange column headings to meet spreadsheet format
6. Save filter

Retention Purge DEMO

7. Run search
8. Export grid > Select save location > Enter file name
9. Open saved file & confirm column headings match
10. Highlight & COPY rows with data
11. PASTE rows into Deletion Log spreadsheet
12. Highlight search results & “Add to workflow”
13. If more than 500 search results, re-run search & repeat steps

Index Key Relocation Project

- Change format of “Term/Year” index key
- Move “Term/Year” from Field4 to Field3
- Move “DOB” from Field3 to “NDSU-DOB” custom property
 - DOB will still be captured in Application Plans
 - Searching for DOB will require Private/Global filter
 - “DOB” can be added as a column in grid (if necessary)
- Can be requested as a Project ticket for each department

Statewide TransForm Update

- Collaborative Registration Form
 - Form is live & in use by all institutions
 - Currently only submitting to “Home Institution” workflow
 - Statewide workflow development in progress (target launch = July 27)
- Name Change Form
 - NDSU go-live is pending
- Residency Form
 - Final approval meeting is scheduled for June 26

Outage Calendar 2018-2019

- **Fall 2018 (voting re-opened)**

- November 27-28 (Tuesday-Wednesday) *new **OPTION #1**
- ~~November 28-29 (Wednesday-Thursday)~~ ← *removed due to conflict*
- December 11-12 (Tuesday-Wednesday) *new **OPTION #2**
- ~~December 12-13 (Wednesday-Thursday)~~

- **Spring 2019**

- NDSU Department submission deadline = **Friday, June 15th**
- DISC Member submission deadline = **Friday, June 29th**
- Qualtrics voting deadline = **Friday, July 13th**

Perceptive Contract Expiration

- Current state contract with Perceptive expires July 1, 2021
- Options:
 - Explore other solutions (alternative would need to be live by 2021)
 - Migrate to Hyland sibling product (OnBase)
 - Short-term renewal of contract
 - Long-term renewal of contract
- Provide feedback to DISC representative (A.J.)

Thank You!

FOR MORE INFORMATION:

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or

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