

NDSU NORTH DAKOTA
STATE UNIVERSITY

ImageNow User Group

December 18, 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
- Review of Recent Upgrade
- Term Format Conversions
- Index Key Relocation Project
- Document Retention & Purging
- Upcoming Online User Training
- Your Questions

Participating Offices

- Admission
- Advising Resource Center
- 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

Campus Expansion Updates

- **Internal Auditor**, Charlene Glur, has search/view access to all drawers
- **Dining Services** users have search/view access to Cancel/Withdrawal documents
- Developing scholarship update process between Financial Aid & **Athletics**
- Have met with the **College of Health Professions** about adding their financial & accounts payable (invoices, etc.) into Perceptive

Fall Upgrade Review

- **Minor software upgrade (7.2.2)**
 - Bigger jump delayed due to server requirements
 - Updated installer file has been saved on X-drive
- **Upcoming Upgrades:**
 - Spring 2019 (March 20-21)
 - Fall 2019 (September 24-25)

WebNow Update

Bad News:

- Apple removed Java support from Safari browser
- WebNow will no longer work in latest version of Safari browser

Good News:

- Perceptive Experience has been installed on TEST environment
- Compatible with all browsers
- Waiting for Spring upgrade to install on updated servers

Term Format Conversions

- Application plans with “Term/Year” index key have been updated from “2018 1 Fall” to “1910” format
- Impacted departments:
 - ADM, CAS, EM, GS, IR, OIP, RL, RR
 - FA Scholarship Checks & Tuition Waiver document types

DOB & Term Re-Indexing

- Process:
 - Add “NDUS-DOB” custom property to all document types
 - Move “Date of Birth” from Field3 to custom property
 - Move “Term/Year” from Field4 to Field3
 - Convert “Term/Year” data from long format to PS codes
- Impacted Drawers:
 - Completed: EM-Security Access
 - Submit a new “Project” ticket via NDUS SharePoint site
 - Will also need to have column headings in Views updated

Document Retention & Purging

- Purging
 - Student ID lists are saved on X-drive
 - Are students with no enrollment prior to term mentioned in filename
 - Conduct searches manually
 - Make sure to exclude documents in workflow, etc.
 - Searches can be set up to match spreadsheet column headings
 - Follow recommended deletion process
 - X-drive > Power Users > Deleting Documents
 - Make sure to log all deletions

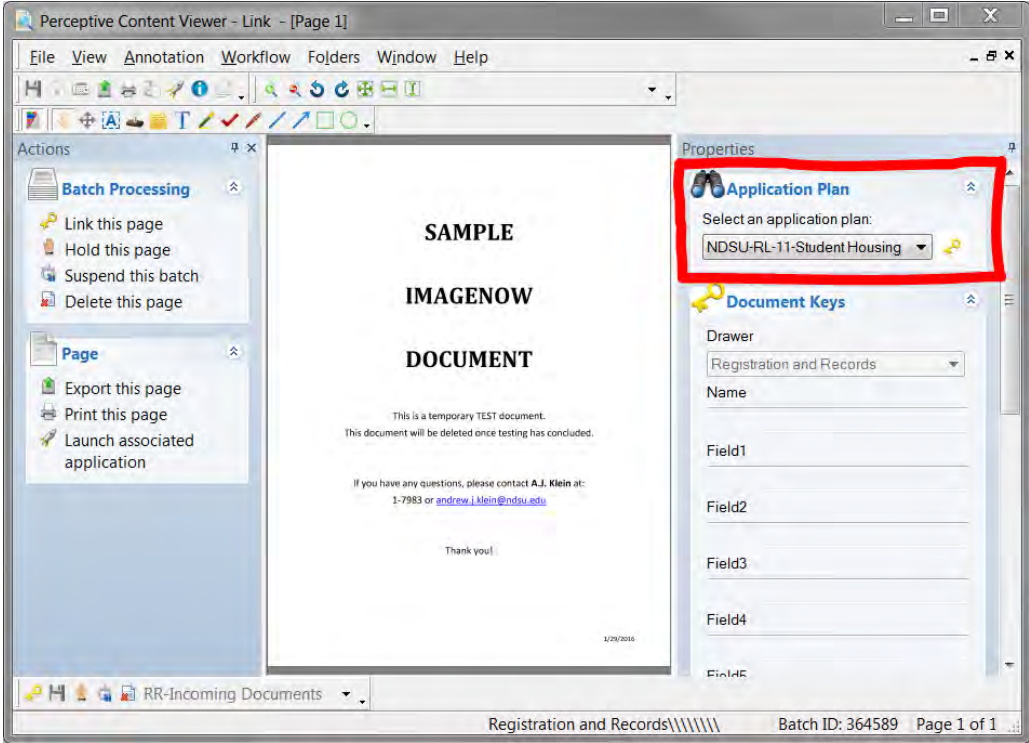
Document Retention & Purging

- Retention Manager Projects
 - Submit new “Project” ticket to NDUS requesting your department’s documents be added to Retention Manager
 - NDUS will send a spreadsheet of all document types in drawer
 - You will need to provide retention information on spreadsheet
 - Record Series Number
 - Length of Retention
 - Disposal Method
 - Chain of Review

Linking Error Issue

- Field1 is equal to << **script will set** >>
 - Caused when “IN Append” application plan is used during linking
 - Indicated by seeing “Line 17” error
 - Clicking through error results in creation of new document
 - New pages are appended if document already exists
- Solution:
 - May need to open “<< script will set >>” document and re-link any sub-pages that do not already exist
 - **OR** delete document if pages are already in system

Linking Error Issue



Perceptive Contract Expiration

- Current contract with Hyland expires July 1, 2021
- Options:
 1. Renew current contract (3-year extension)
 2. Investigate new product options
 3. Renegotiate a new contract
- Institution voting closes Friday, December 21st

Coming Soon

2019 Annual User Assessment Training

- Scheduled for January-February
- Users who do not complete the training will be deactivated and then removed
- Review your user security reports
 - X:\ImagenowClient\Power Users\Security Reports
 - Remove any inactive users
 - Check “Group Member List” of other departments for your users

Thank You!

FOR MORE INFORMATION:

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or

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