

NDSU NORTH DAKOTA
STATE UNIVERSITY

Document Imaging User Group

May 16, 2019

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
- Steering Committee Recap
- Perceptive Experience Preview
- Peoplesoft Update Impact on Application Plans
- Document Retention & Purging
- Annual Drawer Audits
- Power User Training
- Your Questions

Participating Offices

- Admission
- 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

Affiliate Participants

Departments that do not have documents in the system but have users who have access to search & view another department's documents

- Advising Resource Center (Professional Advisers & ENGR Admins)
- Audit & Compliance
- Dining Services (access to Cancel/Withdrawal forms)
- Sanford Nursing-Bismarck
- Student Success Programs (limited access to Student Records)
- University Police & Safety Office (access to HR forms)

Campus Expansion Updates

- **College of Health Professions:** Dean's Office is in-progress
- **College of Arts & Humanities** and **College of Math & Science:** Dean's Offices are waiting for first kick-off meeting
- **College of Business:** follow-up meeting pending
- **Athletics Compliance:** users will be added for search & view access of Financial Aid's Athletic Scholarship Award TransForm
- **Budget Office** and **Ag Budget Office:** initial meeting set to discuss storage of DocuSign forms
- **Dining Services:** on-boarding meeting pending

Steering Committee Recap

- **Upgrade Updates:**
 - Spring 2019 → completed on weekend of March 23-24
 - Summer 2019 → migration from old to new database
 - Fall 2019 → September 24-25 (reschedule to weekend?)
- **Current Projects:**
 - Statewide “Cancel/Withdrawal” & “Summer Aid” forms
- **Future Issues:**
 - Contract will be renegotiated starting July 2020
 - Includes new online forms product (“Perceptive Portal”)

Perceptive Experience

- New web-based product (will replace WebNow)
- Does not require Java
- Can be used on all browsers (and mobile devices)
- Multi-factor authentication possible (no more VPN)
- Some features currently limited due to security
- Timeline:
 - Pilot testing in May (pending)
 - Go-Live in July/August

Peoplesoft Update

- Campus Solutions upgrade scheduled for July 12-14
- Will impact all student-based linking screens
 - HRMS and FIN modules are already on updated version
- Hope to work on new application plans prior to upgrade
- Testing new method that allows using Chrome browser
 - Uses scripting to target data fields on page
 - Drawback: complex scripts slow down linking speeds

Document Retention & Purging

- Retention Manager Projects
 - Current Departments that are In-Progress:
 - Enrollment Management (EM)
 - Institutional Research (IR)
 - Customer Account Services (CAS)
 - Registration & Records (RR)
 - A ticket will be submitted for all other departments

Document Retention & Purging

- Manual 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 deletion log column headings
 - Follow recommended deletion process
 - X-drive > Power Users > Deleting Documents
 - Make sure to log all deletions

Annual Drawer Audit

- **Deadline = Friday, June 21**
 - Complete a survey for each drawer owned by your department
 - Complete a survey for any drawer shared with another dept.
 - Example: “NDSU-SR-Student Records” (ADM & RR)
- **Document Validation Process**
 - Documents that go through workflow count as being validated
 - Need way to validate documents that do not go through workflow
 - **Recommendation** = route all captured documents into workflow and create separate queue to hold all non-routed documents

Power User Training

- Has been completed by several departments
- Submit ticket to request training
- Training Includes:
 - Overview of SharePoint site
 - Roles & Responsibilities
 - Support Resources
 - Retention Procedures
 - Scanner & Capture Profiles
 - Hyland Support Pages

Other Notes & Reminders

- It's New Computer Time!
 - Assist users with installations on new machines
 - Remember to delete scanner token on scanning computers
- TransForms To-Do List:
 - Athletic Scholarship Award Request (FA & CAS)
 - Vet Dependent Waiver (CAS & RR-VET)
 - Work-Study Redistribution (FA)
 - Ag Plan of Study (RR)

Thank You!

FOR MORE INFORMATION:

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or

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