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Document Imaging User Group
June 11, 2021

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# User Group Goals

- **Communicate & Share Ideas with Others**
  - Share Communications from NDUS Team
  - Discuss What Works / Best Practices
  - Discuss Common Problems & Issues
  - Coordinate Efforts between Offices
  - Share Knowledge & Coordinate Training

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

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# Today's Agenda

- Introductions & Office Updates

- NDUS Steering Committee Recap

- Upcoming Upgrade

- Chrome Application Plan Recap

- New Forms Solution

- DocuSign Import Process

- Your Questions

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# Participating Offices

- Admission
- Budget Office
- College of Business
- College of Health Professions
- College of Science & Math
- Customer Account Services
- Enrollment Management
- Facilities Management
- Financial Aid & Scholarships

- Graduate School
- Human Resources/Payroll
- International Student Services
- IT Services
- One Stop
- Provost
- Registration & Records
- Residence Life
- Teaching & Learning

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# Campus Expansion Updates

- **College of Human Sciences & Education:** *Ready for training*

- **College of Arts & Humanities:** *In progress*

- **Ag Budget Office:** In queue

- **Dining Services:** In queue

- **Library:** Has asked for more information

- **Student Health Services:** Has asked for more information

- **Williston Extension Office:** Has asked for more information

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# Affiliate Participants

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

- **Athletic Academics** (limited access to Student Records)

- **Audit & Compliance** (access to search all documents)

- **Career & Advising Center** (Professional Advisers + ENGR Admins)

- **Dining Services** (access to Cancel/Withdrawal forms)

- **Institutional Research & Analysis** (access to Data Requests)

- **Sanford Nursing-Bismarck** (limited access to Student Records)

- **University Police & Safety Office** (limited access to HR forms)

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# NDUS Steering Committee Recap

- **Software Upgrade:**
  - **June 19-20** (Saturday-Sunday)

- **Retention Manager Projects:**
  - Currently on hold due to batch number issue
    - Batches supposed to be limited to 500 items, some exceeding limit
    - Harder to calculate total doc count & validation percentage
    - Could potentially skip validating large numbers of documents

- **New Forms Product** ("GT eForms")

# Spring/Summer 2021 Upgrade (EP3)

- Involves entire system (desktop clients & online)

- TransForms will remain online but will not submit completed forms into Perceptive until upgrade is complete

- Auto-updater should work but some may require manual install

- Encourage "View Only" users to use Experience online if possible
  - *(This eliminates the need to do any software installations)*

- Color printing setting typically gets replaced ("inowprint" file)

- Capture profiles may need to be re-installed ("inscan" file)

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# Chrome Application Plans

- Renamed copies of the "(Chrome)" plans are now in place
  - **Old Name:** "NDSU-DEPT-Finances (Chrome)"
  - **New Name:** "NDSU-DEPT-Finances"

- Please re-install capture profiles after upgrade as needed

- Plans with "(Chrome)" label will be disabled & deleted after upgrade

- All "Internet Explorer" plans will be deleted after upgrade

- **Any questions, issues, or needs for additional plans?**

# PDF Conflict in Google Chrome

- Caused when PDF opens in Chrome browser tab
- PDF becomes "active" tab overriding Peoplesoft linking screen
- **Solution:**
  - In Chrome:
    - Settings > Site Settings > Additional content settings > PDF Documents
      - ENABLE: "Download PDF files instead of automatically opening them in Chrome"
  - In Adobe (Acrobat or Reader):
    - Edit > Preferences > General > click "Select As Default PDF Handler" button

- **Result:** PDF links in Chrome will automatically open in Adobe

# New Forms Solution

- [**GT eForms**](#) will replace Perceptive TransForms (July 1, 2022)

- Product is an "add-on" to Peoplesoft

- **PROS:**
  - More robust data lookups from Peoplesoft (e.g., majors, departments)
  - Students will have an online "portal" of available forms within Peoplesoft
  - Students can track status of in-progress forms

- **CONS:**
  - Form data will only live in Peoplesoft (no "image" in Perceptive)
    - However, attachments may be exported to Perceptive

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# TransForm Conversions

- **Statewide forms will be converted first:**
  - Cancel/Withdrawal
  - Collaborative
  - Name Change
  - Residency

- **Remaining forms will be converted alphabetically by institution:**

  1. BSC (47)
  2. DCB (4)
  3. DSU (6)
  4. LRSC (3)

  5. MaSU (4)
  6. MiSU (14)
  7. NDSCS (10)
  8. **NDSU (46)**

  9. NDUS (12)
  10. UND (74)
  11. VCSU (5)
  12. WSC (5)

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# NDSU TransForms

- CAS (8)
- EM (2)
- FA (14)
- GS (2)
- PRV (1)
- RR (19)

*__NOTE:__ *Forms that do not easily integrate into Peoplesoft may need to be converted into DocuSign forms.*

# DocuSign Import Process

- Currently applied to several FA, GS, and HR documents
  - OIP & PRV have also placed request for auto-import

- Cannot always capture all index keys for complete linking
  - There is no way to do data lookups from Peoplesoft (DOB, Hire Date)

- Linking is only limited to index keys
  - Custom property values cannot be captured

- Have to rely on re-linking documents within workflow to fully complete the linking step (workflow acts as "Batches")
  - Custom properties can be populated during this step

# Other Notes

- Annual Drawer Audit (due June 25th)

- Renaming of "FIN" and "HR" document types

- New Teams Page: "NDSU Document Imaging User Group"

- New NDUS SharePoint site (https://tiny.ndus.edu/ndus-dms)

- Perceptive Scanning Security Policy (https://kb.ndsu.edu/110965)

- Security Group Update

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# Thank You!

**FOR MORE INFORMATION:**

- Contact A.J. Klein at 1-7983 or [andrew.j.klein@ndsu.edu](mailto:andrew.j.klein@ndsu.edu)

- NDSU Document Imaging website at [www.ndsu.edu/imaging](http://www.ndsu.edu/imaging)

- Teams: "NDSU Document Imaging User Group"

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