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
• News & Notes
• Old Business / New Business
• Available Form Solutions
• 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
- TRiO (McNair Programs)
News & Notes

UPGRADE / OUTAGE SCHEDULE:

• Fall 2017 (version 7.2)
  – Option 1: November 14-15 (Tuesday-Wednesday)
  – Option 2: November 15-16 (Wednesday-Thursday)

• Spring 2018 (version 7.3)
  – Option 1: May 1-2 (Tuesday-Wednesday)
  – Option 2: May 2-3 (Wednesday-Thursday)

• Fall 2018 (version 7.x)
  – Option 1: November 6-7 (Tuesday-Wednesday)
  – Option 2: November 14-15 (Wednesday-Thursday)
Old Business

ONLINE TRAINING ASSESSMENT

• Training closed on March 31st
• Accounts of users who did not complete training were locked
• Locked users need to submit ticket via NDUS Help Desk
• Locked users as of July 7th will be deleted

*New users will not be able to take the training until January
Old Business

IMAGENOW PRINTER NOT RESPONDING

• Still no permanent solution

• New temporary solution
  – Try restarting the “PEERNET Spooler Service 11.0” (demo)

• If all else fails, Uninstall/Re-install client software

• Have users work with Power Users first

• How-to PDF “Installing Capture Profiles” available on X-drive
Reminders

NEW COMPUTERS

• Windows 10 computers need to install a missing Windows component (.NET 3.5) before Perceptive will work
• See “Windows 10 Installation Fix” PDF on X-drive

SCANNER COMPUTERS

• Make sure to remove the scanner token before swapping out older scanner computers
• See instructions in “Scanner Setup” folder on X-drive
New Business

ANNUAL AUDIT SURVEY

• Deadline = June 23 (Friday)
• Questions???

ANNUAL PURGE / DOCUMENT RETENTION

• Retention Manager module is in development
• NDUS will be sending Power Users spreadsheets asking for records retention information for each document type
• Purge queues needed for some Department workflows
Form Solutions

TRANSFORMS
• Auto-fill fields based on secure login
• Use form information to populate index keys & custom properties
• Submit forms directly into designated queue in Perceptive

DOCUSIGN
• Add signatures to forms
• Can do multi-level external workflow via email with non-IN users
• Forms can be printed into Perceptive when completed
Available Resources

NDUS SHAREPOINT SITE

- Expect to see a new version of the NDUS SharePoint site around July 1st
- Change is tied to launch of new ticketing system
- New site will likely be linked from inside.NDUS.edu web site

NDSU DOCUMENT IMAGING WEBSITE

- Recently updated
Questions???