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
Retirement 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:

Contact A.J. Klein at 1-7983 or andrew.j.klein@ndsu.edu

or

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