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 is 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