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