

NDSU NORTH DAKOTA
STATE UNIVERSITY

Document Imaging User Group

November 15, 2019

STUDENT FOCUSED • LAND GRANT • RESEARCH UNIVERSITY

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**

Today's Agenda

- Introductions & Office Updates
- NDUS Steering Committee Recap
- Hyland RUG Meeting Recap
- Perceptive Experience Feedback
- Troubleshooting Issues
- Other Notes
- Annual User Assessments
- Your Questions

Participating Offices

- Admission
- College of Health Professions
- 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:** Complete!
- **College of Arts & Humanities:** In progress
- **College of Science & Math:** In progress
- **College of Business:** In progress
- **Budget Office:** In queue
- **Ag Budget Office:** In queue
- **Dining Services:** In queue
- **Bookstore:** In queue

NDUS Steering Committee Recap

- **Upgrade Updates:**
 - Spring 2020 → completed on weekend of May 2-3
 - Fall 2020 → November 21-22
- **Current Projects:**
 - Retention Module implementations (NDSU=13 requests)
 - TransForms (Withdrawal, Summer Aid)
 - Cross-Institution Workflows (Pathway w/NDSCS completed)
- **Future Projects:**
 - Hosting change for SharePoint site (to Office 365)

NDUS Steering Committee Recap

- **Future Statewide TransForms:**
 - Employee Tuition Waiver
 - Bio-Demo Update (for non-name changes like DOB & SSN)
 - Preferred Name Changes
 - Veteran Dependent Waiver
 - Immunization Waiver
- **New Forms Product Note:**
 - Perceptive not taking new customers for “Portal” product
 - Developing new in-house product (available Q2 2020?)

Hyland RUG Meeting Recap

- **Product Road Map:**
 - New software version naming convention (“Foundation”)
 - Scanning via Experience
 - Requires a different capture license
 - Sends docs to a linking queue instead of “Batches”
 - Moving services to the “Cloud”
- **Non-Internet Explorer Linking:**
 - Using scripting method to read other browsers (Chrome?)
 - I have completed training & hope to begin testing Summer 2020

Perceptive Experience

- Is now Live (webdms.ndus.edu/experience)
- **What Experience CAN do:**
 - Document Searches & Viewing
 - Applying Annotations
 - Editing Notes Box
 - Workflow Processing & Routing
- **What Experience CANNOT do:**
 - Document Capture & Linking (“Batches”)
 - Editing of Index Keys & Custom Properties
 - View Workflow History

Troubleshooting Issues

- **Disappearing Views**

- Check view list in Experience to confirm security
- Caused by mismatched version numbers between client & server
- Uninstall/Reinstall client to newest version

- **Scanner Maintenance**

- Keep glass surfaces clean
- Keep rubber rollers clean
- Replace the rollers & pick-up pads

**(Looking to convert all remaining KOFAX licenses to TWAIN)*

Other Notes

- **X-drive Name Change**
 - Proposing change from “ImagenowClient” to “DocumentImaging”
- **Document Type Name Changes**
 - Please include me on any edits to document type names
 - Some doc type names are hard-coded into several search views
- **TransForms To-Do List:**
 - Dependency Override Request (FA) – *in progress*
 - Ag Plan of Study (RR) – *in progress*
 - SAP Appeal (FA)
 - Work-Study Redistribution (FA)

Annual User Assessment

- **Begins:** January 31
- **Ends:** March 31
- **Users Disabled:** April 1
- **Users Deleted:** May 1

Thank You!

FOR MORE INFORMATION:

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or

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