Document Imaging User Group
November 15, 2019
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