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
- Retention Manager Projects
- Chrome Application Plans
- DocuSign Import Process
- Other Notes
- Your Questions
Participating Offices

- Admission
- College of Health Professions
- **College of Science & Math**
- Customer Account Services
- Enrollment Management
- Facilities Management
- Financial Aid & Scholarships
- Graduate School
- Human Resources/Payroll
- International Student Services
- IT Services
- One Stop
- Provost
- Registration & Records
- Residence Life
- Teaching & Learning
Campus Expansion Updates

- **College of Arts & Humanities**: In progress
- **College of Business**: In queue
- **Budget Office**: In queue
- **Ag Budget Office**: In queue
- **Bookstore**: In queue
- **Dining Services**: In queue
- **Williston Extension Office**: Has asked for more information
Affiliate Participants

Departments that do not have documents in the system but have users who have access to search & view another department’s documents

- **Athletic Academics** (limited access to Student Records)
- **Audit & Compliance** (access to all documents)
- **Career & Advising Center** (Professional Advisers + ENGR Admins)
- **Dining Services** (access to Cancel/Withdrawal forms)
- **Institutional Research & Analysis** (access to Data Requests)
- **Sanford Nursing-Bismarck** (limited access to Student Records)
- **University Police & Safety Office** (limited access to HR forms)
NDUS Steering Committee Recap

• **Software Upgrade:**
  – Fall 2020 → **November 21-22** (Saturday-Sunday)
  – New version includes additional features in Experience
    • Create & save custom search filters
    • View document’s Workflow history

• **Current Projects:**
  – Single Sign-on “Portal” (will replace need for VPN)
  – Retention Manager implementations
NDUS Steering Committee Recap

• NDUS/Hyland Contract Extension:
  – Hyland is the parent company of Perceptive
  – Current contract expires June 30, 2021
  – Agreed to two one-year renewals through 2023
  – New forms product is being negotiated separately
Retention Manager Projects

• Fall Reporting “Freeze” (August-October) almost complete
  – This step populates retention-related custom properties

• Any questions about this process?
  – Assign Record Control Number (RCN) to each Document Type
  – Assign Tier 1 (Review) & Tier 2 (Delete) to each Drawer/RCN

• Current Progress:
  – In-progress: ADM, CAS, EM, FA, HR, OTL, RR
  – Waiting for Spreadsheets: FM, GS, IT, OIP, PRV, RL
Chrome Application Plans

• Are now live!
  – Available to all users in Batches screen
  – Direct-linking requires updated Capture Profile

• How many departments have fully converted to Chrome?
  – Contact me if you are done using the Internet Explorer plans

• Any instances where Chrome plans aren’t working?

• Any need for additional plans?
  – Some FM plans are pending
DocuSign Import Process

• Working with ITS to develop automated import process
  – Similar process to how Admission docs are captured from TargetX

• Process:
  1. DocuSign form is completed
  2. ITS process reads form and extracts designated index key information
  3. Form & Index Key information is passed to Perceptive via MoveIT
  4. Form (and attachments) is converted into a Perceptive document
  5. Form is routed to department’s “Incoming Documents” workflow queue
Other Notes

• **X-drive Name Change**
  – From “ImagenowClient” to [“DocumentImaging” or “PerceptiveContent”]

• **Online Training Available**
  – NDUS has purchased the “Premium” training license through Hyland
  – Requires creation of a login account on Hyland Customer Portal
    • Go to community.hyland.com
    • Make sure to enter “North Dakota University System” as the “Company”
  – Go to training.hyland.com/perceptive/
Annual User Assessment*

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

*Dates are approximate (taken from last year’s schedule)*
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