

NDSU NORTH DAKOTA
STATE UNIVERSITY

Document Imaging User Group

October 30, 2020

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
- 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:

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or

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