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
- Upcoming Upgrade
- Chrome Application Plan Recap
- New Forms Solution
- DocuSign Import Process
- Your Questions
Participating Offices

- Admission
- **Budget Office**
- **College of Business**
- 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 Human Sciences & Education: Ready for training
• College of Arts & Humanities: In progress
• Ag Budget Office: In queue
• Dining Services: In queue

• Library: Has asked for more information
• Student Health Services: Has asked for more information
• 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 search 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:
  – June 19-20 (Saturday-Sunday)

• Retention Manager Projects:
  – Currently on hold due to batch number issue
    • Batches supposed to be limited to 500 items, some exceeding limit
    • Harder to calculate total doc count & validation percentage
    • Could potentially skip validating large numbers of documents

• New Forms Product (“GT eForms”)
• Involves entire system (desktop clients & online)
• TransForms will remain online but will not submit completed forms into Perceptive until upgrade is complete
• Auto-updater should work but some may require manual install
• Encourage “View Only” users to use Experience online if possible
  – (This eliminates the need to do any software installations)
• Color printing setting typically gets replaced (“inowprint” file)
• Capture profiles may need to be re-installed (“inscan” file)
Chrome Application Plans

• Renamed copies of the “(Chrome)” plans are now in place
  – Old Name: “NDSU-DEPT-Finances (Chrome)”
  – New Name: “NDSU-DEPT-Finances”

• Please re-install capture profiles after upgrade as needed

• Plans with “(Chrome)” label will be disabled & deleted after upgrade

• All “Internet Explorer” plans will be deleted after upgrade

• Any questions, issues, or needs for additional plans?
PDF Conflict in Google Chrome

- Caused when PDF opens in Chrome browser tab
- PDF becomes “active” tab overriding Peoplesoft linking screen
- **Solution:**
  - In Chrome:
    - Settings > Site Settings > Additional content settings > PDF Documents
      - ENABLE: “Download PDF files instead of automatically opening them in Chrome”
  - In Adobe (Acrobat or Reader):
    - Edit > Preferences > General > click “Select As Default PDF Handler” button
- **Result:** PDF links in Chrome will automatically open in Adobe
New Forms Solution

• **GT eForms** will replace Perceptive TransForms (July 1, 2022)
• Product is an “add-on” to Peoplesoft

**PROS:**
– More robust data lookups from Peoplesoft (e.g., majors, departments)
– Students will have an online “portal” of available forms within Peoplesoft
– Students can track status of in-progress forms

**CONS:**
– Form data will only live in Peoplesoft (no “image” in Perceptive)
  • However, attachments may be exported to Perceptive
TransForm Conversions

• **Statewide forms will be converted first:**
  - Cancel/Withdrawal
  - Collaborative
  - Name Change
  - Residency

• **Remaining forms will be converted alphabetically by institution:**

  1. BSC (47)  
  2. DCB (4)  
  3. DSU (6)  
  4. LRSC (3)  
  5. MaSU (4)  
  6. MiSU (14)  
  7. NDSCS (10)  
  8. **NDSU (46)**  
  9. NDUS (12)  
  10. UND (74)  
  11. VCSU (5)  
  12. WSC (5)
NDSU TransForms

- CAS (8)
- EM (2)
- FA (14)
- GS (2)
- PRV (1)
- RR (19)

*NOTE: Forms that do not easily integrate into Peoplesoft may need to be converted into DocuSign forms.*
DocuSign Import Process

- Currently applied to several FA, GS, and HR documents
  - OIP & PRV have also placed request for auto-import

- Cannot always capture all index keys for complete linking
  - There is no way to do data lookups from Peoplesoft (DOB, Hire Date)

- Linking is only limited to index keys
  - Custom property values cannot be captured

- Have to rely on re-linking documents within workflow to fully complete the linking step (workflow acts as “Batches”)
  - Custom properties can be populated during this step
• Annual Drawer Audit (due June 25th)
• Renaming of “FIN” and “HR” document types
• New Teams Page: “NDSU Document Imaging User Group”
• New NDUS SharePoint site (https://tiny.ndus.edu/ndus-dms)
• Perceptive Scanning Security Policy (https://kb.ndsu.edu/110965)
• Security Group Update
FOR MORE INFORMATION:

- Contact A.J. Klein at 1-7983 or andrew.j.klein@ndsu.edu
- NDSU Document Imaging website at www.ndsu.edu/imaging
- Teams: “NDSU Document Imaging User Group”