

NDSU NORTH DAKOTA
STATE UNIVERSITY

Document Imaging User Group

November 29, 2021

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 Document Imaging across campus**

Today's Agenda

- Introductions & Office Updates
- NDUS Steering Committee Recap
- Upgrade Update
- Forms
- Your Questions

Participating Offices

- Admission
- Budget Office
- College of Arts, Humanities & SS
- College of Business
- College of Health Professions
- College of Human Sci & Education
- 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

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**
 - Fall upgrade canceled (database issue)
 - Upgraded server to newest EP3 build #
 - Will upgrade to next available version in Spring/Summer 2022
- **Contract Renewal Discussions**
 - Currently under repeating 1-year contract
 - Feedback meeting @ 3:30 Tuesday, November 30 (tomorrow)

NDUS Steering Committee Recap

- **Web Capture/Index App**
 - Would allow scanning, printing, and linking within online version
 - Could potentially move all user activity to online version
 - Estimated cost ~\$30,000 per year (statewide total)
- **Hyland Training Premium Subscription**
 - Free training modules available at training.hyland.com
 - Most trainings are tailored to Administrator role
 - Will renew subscription for another year

GT eForms

Statewide forms currently available:

- Cancel/Withdraw to Zero
- Cancel/Withdraw to Zero-Admin*
- Collaborative Request
- FERPA Release Form
- Legal Name Change Request
- Resident Student Status Form

**(Admin = Submitted by staff on behalf of student)*

TransForm Conversions

- **Current Perceptive TransForm contract expires June 30, 2021**
 - Existing TransForms need to be converted prior to contract expiration
 - Conversions will be developed alphabetically by institution
 - Currently developing Minot State forms
- **Remaining forms will be converted alphabetically by institution:**

1. BSC (47)	5. MaSU (4)	9. NDUS (12)
2. DCB (4)	6. MiSU (14)	10. UND (74)
3. DSU (6)	7. NDSCS (10)	11. VCSU (5)
4. LRSC (3)	8. NDSU (46 → 27)	12. WSC (5)

NDSU TransForms

Department	TransForms	eForms	Other	Discontinue
RR	19	10	2	7
FA	16	10	1	5
CAS	8	6	-	2
PRV	1	1	-	-
GS	2	-	1	1
EM	2	-	2	-

After This Round of Conversions

- Review your current catalog of forms and start considering what will happen to your remaining forms that are not eForms/DocuSign
 - (any existing forms that are currently only available as PDFs)
- Goal = Make as many forms online-submittable as possible
- Compile list of potential eForms
- Compile list of potential DocuSign forms
- Review current DocuSign forms for conversion to eForms
 - (HR forms)

Other Notes

- IT Security: Be on the lookout for DocuSign email spoofing
- Records Management destruction reports due November 30th (?)
- User Assessment Quiz coming up in February/March
- Power User Training
 - Currently being developed
 - May consist of two sessions (Orientation & Hands-on)
 - Will be scheduling soon
- Review scanner usage (may need to free licenses for new offices)

Thank You!

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”