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](http://training.hyland.com)
  - Most trainings are tailored to Administrator role
  - Will renew subscription for another year
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)  
  2. DCB (4)  
  3. DSU (6)  
  4. LRSC (3)  
  5. MaSU (4)  
  6. MiSU (14)  
  7. NDSCS (10)  
  8. NDSU (46 → 27)  
  9. NDUS (12)  
  10. UND (74)  
  11. VCSU (5)  
  12. WSC (5)
# NDSU TransForms

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</table>
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 30\textsuperscript{th} (?)

• 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)
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”