

**NDSU** NORTH DAKOTA  
STATE UNIVERSITY

**Document Imaging User Group**

June 30, 2022

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# 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
- Upgrade Review
- Drawer Audits
- Retention Manager Status
- GT eForms Conversion Review
- Development Options for Remaining Forms
- Workflow Clean-up
- Your Questions

# Participating Offices

- Admission
- Budget Office
- College of Arts, Hum & Soc Sci
- 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)

# Summer 2022 Upgrade

- Conducted June 10-12
- New naming convention for versions (22.1)
- Color printing setting typically gets replaced (“**inowprint**” file)
- Capture profiles may need to be re-installed (“**inscan**” file)
- Encourage “View Only” users to use Experience online if possible
  - Eliminates the need to do any software installations
  - We are approximately two upgrades away from “Online Only” use of product
  - Early adoption will reduce training curve prior to full switch-over

# Perceptive Experience

## Demo of online version of Perceptive

(Go to <https://webdms.ndus.edu/experience/> in any Internet browser)

# Other Updates

- Annual Drawer Audits (June 24<sup>th</sup>)
  - Template of audit questions saved on X-drive ("Power Users" folder)
  - Save form responses as a reference for next year
- Retention Manager
  - Process is currently running
  - Check the "Tasks" button for new batches
  - Be aware of tasks that contain “More than 500 results”
  - Vendor support ticket for “500+ results” issue is still pending
  - Will try to re-initiate meetings with NDUS team for departmental setups



# TransForm Conversion Update

- All Perceptive TransForms have been converted (as of Monday)
- Submit help ticket to have new forms created as GT eForms
  - “GT eForms Support Request” link on SharePoint site
- Contact “[Authorized DocuSign PowerForm Publisher](#)” about converting PDF forms to DocuSign
  - DocuSign forms can be imported into Perceptive or Shared drive
- Microsoft Forms and Qualtrics are also alternative options

# Workflow Clean-up

- Will need to conduct a review of workflow processes impacted by forms that are no longer being saved into Perceptive
- Will need to determine which workflow queues are still needed and which queues can be deleted
- Impacted Departments:
  - CAS, EM, FA, GS, PRV, RR

# Power User Training

- Three identical Power User Training sessions have been scheduled:
  - **July 18** (Mon.), 10:00-12:00, QBB 132
  - **July 20** (Wed.), 2:00-4:00, QBB 132
  - **July 28** (Thu.), 2:00-4:00, QBB 132
- Topics to be covered:
  - Power User responsibilities
  - Submitting help tickets
  - Guided walk-through of helpful resources

*\*(departments with only one current Power User are encouraged to invite new designees)*

# Thank You!

## FOR MORE INFORMATION:

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