Document Imaging User Group

June 30, 2022
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
Demo of online version of Perceptive

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

• Annual Drawer Audits (June 24th)
  – 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

• NDSU Document Imaging website at www.ndsu.edu/imaging

• Teams: “NDSU Document Imaging User Group”