NDSU NORTH DAKOTA STATE UNIVERSITY

Document Imaging User Group

November 18, 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**

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Today's Agenda

- Introduction

- Upgrade Preview

- Using Perceptive Off-Campus

- Workflow Clean-up

- Power User Training Session

- Your Questions

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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

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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)

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Fall 2022 Upgrade

- Scheduled for the weekend: **November 19-20**

- Will be a "Patch" update only (will remain on version "22.1")

- Installing software will **<u>NOT</u>** be necessary (but can be done at any time if needed for troubleshooting purposes)

- Existing "**inscan**" (capture profiles) and "**inowprint**" (color printing) files should continue to work

- Updated installer file has been saved to the X-drive

Using Perceptive Remotely

REMINDER: a VPN connection is required to use Perceptive remotely

- VPN = Virtual Private Network

- Establishes a secure connection to campus/NDUS network

- VPN is needed for <u>BOTH</u> installed desktop client AND online version when used off-campus

- Two ways to establish VPN connection:
  - Software installed on computer ("Cisco AnyConnect")
  - Hardware device connected to home network ("Aruba")

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VPN Software

"**Cisco AnyConnect Secure Mobility Client**" software

- Installed directly onto computer

- Establishes a secure connection to a NDUS network

- Can be used from home or during travel (recommended for laptops)

- Instructions available in "**Off-Campus Setup**" folder on X-drive

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VPN Software Connections

- **ND<u>US</u> VPN** (existing option)
  - Requires NDUS help ticket requesting VPN security role for user
  - Allows connection to Perceptive
  - Does not connect to NDSU campus network drives (S:, U:, X: drives)

- **ND<u>SU</u> VPN** (new option coming soon)
  - Currently working with Help Desk to allow connection to Perceptive
  - Would not require NDUS security role request
  - (Might?) allow automatic connection to campus network drives

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VPN Hardware

If you frequently work from home:

- Contact the campus Help Desk about an "**Aruba**" device
  - Device connects to your home router
  - Creates an "**eduroam**" hotspot
    - Treats your connection as if you are on campus
  - Can connect your computer directly by wire or wirelessly
  - Automatically connects to shared network drives

Cost: free while limited inventory lasts, or $400 for new orders

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Workflow Clean-up

- Several departments still need to review workflow queues that are no longer needed after forms were converted to GT eForms:

  - Identify impacted queues

  - Remove queues and/or associated routing rules

  - If document type used for the TransForm will not be used going forward, convert the document type to "HIST"

- Contact A.J. when ready to discuss modifications

Power User Training

- A new Power User Training session will be scheduled (January?)

- Invitations will go out to users new to the Power User role

- Departments with recent Power User changes or vacancies:
  - CHP, CHSE, FM, HR, IT, OIP, OS, RL

- Topics 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)

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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"

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