



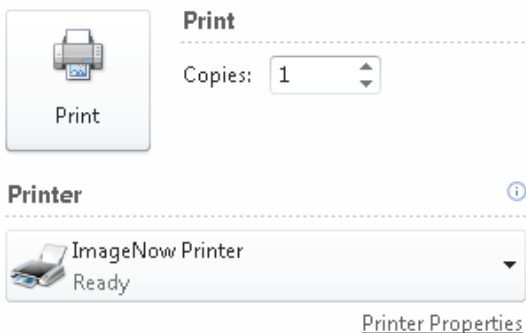
Duke Graduate School Reappointment Letter Upload to Perceptive Content (Formerly ImageNow)

This document will outline the steps needed to upload Reappointment Letters into Perceptive Content (formerly ImageNow) to be stored as part of the electronic student record. Note that this process is for PhD students only. This process is very similar to the Conference Travel Form upload process, and uses the same queue in Perceptive Content. The difference is that this process uses the Reappointment Letter Printer capture profile, so that the document will be tagged with the Reappointment Notice GS Document Type. See Appendix A for instructions on how to set up the Reappointment Letter Printer capture profile if you do not have it already. NOTE: in May 2021 SISS changed how the capture profiles should be set up to work with Google Chrome instead of Internet Explorer. Please see Appendix A to adjust your Reappointment Letter Printer capture profile to the new settings.

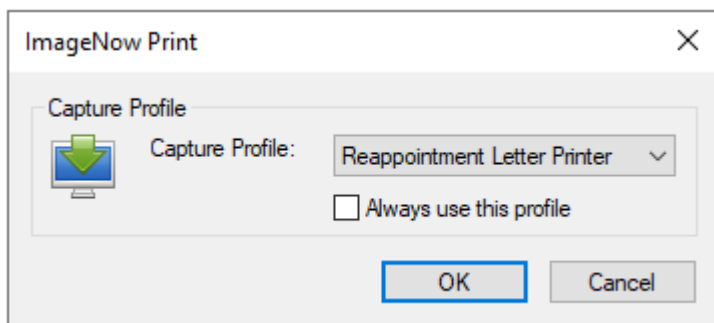
1. Open the student's record in PeopleSoft (DukeHub/SISS).

Use Google Chrome only  . You can no longer use Internet Explorer .

2. Navigate to the Student Program/Plan page: you can use the “View/Update Student Prog/Term” tile to get there, but **NOT** the “Student Admin Center” tile or the “Student Services Ctr (Student)” page. Select the Student Plan tab, and click on the ImageNow Linking button (as in the committee approval form upload process).
3. Open the PDF of the reappointment letter and print it, selecting the Image Now Printer option.



4. When the Capture Profile window opens, choose the Reappointment Letter Printer capture profile. See Appendix A if you do not have the Reappointment Letter Printer capture profile.



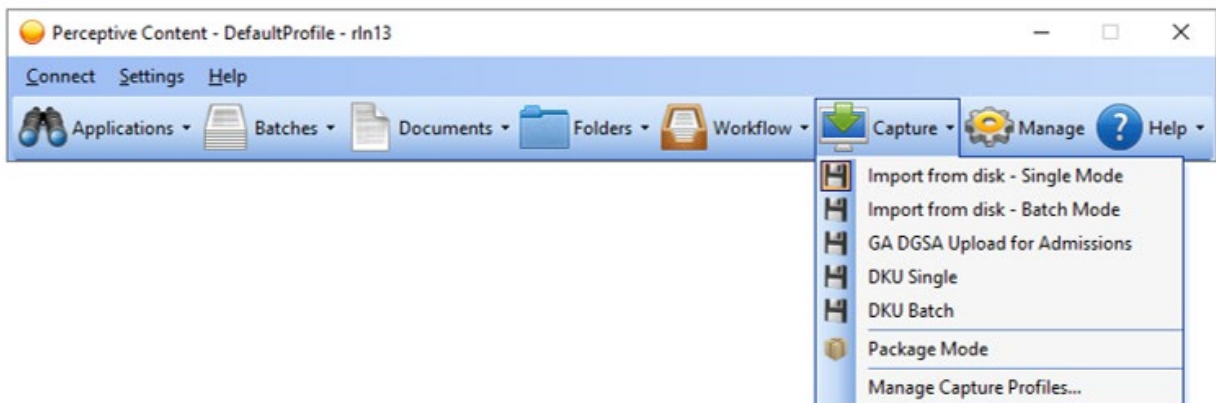
- When the document appears in the Perceptive Content Viewer, verify that the student's information has populated in the panel on the right. Check that the Document Type is Reappointment Notice GS and then save the document.
- The Reappointment Letter Printer capture profile will import the document into the GS CONF TRAVEL XXX queue specific to your program. Note that this is the same queue where conference travel forms go; there is no separate queue for reappointment letters. The DGSA must then go to that queue and forward the document to The Graduate School for processing. To route a document, click on the icon with the blue arrow at the bottom of the Perceptive Content Viewer window.



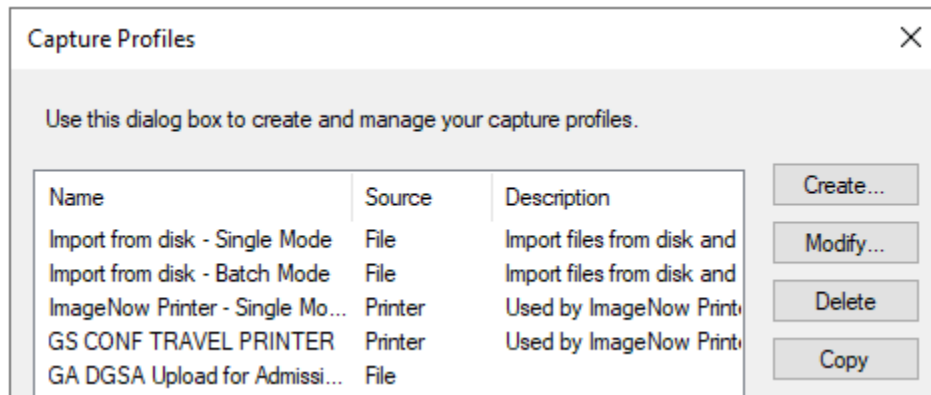
- The Office of Finance will append the letter to the electronic student record in Perceptive Content. Letters with missing information will be returned to the DGSA for corrections.

APPENDIX A: Creating the Reappointment Letter Printer Capture Profile (DGSA only)

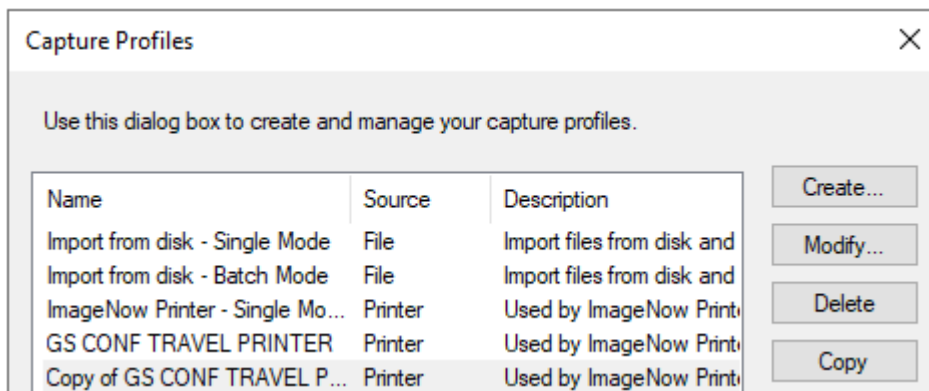
- Log in to Perceptive Content.
- Click on the arrow next to the word "Capture" and the panel below will appear.



3. Click on “Manage Capture Profiles” and the following window will open.



4. Check first to see if you already have a capture profile called Reappointment Letter Printer. If you do, simply select it and click on the Modify button to confirm that your settings are set as shown below. If you do not already have the Reappointment Letter Printer capture profile, you will need to create one. Select the GS CONF TRAVEL PRINTER capture profile (or if you do not have one, you can select the ImageNow Printer – Single Mode capture profile) and click on the Copy button. The copy of the conference travel printer will show as below. Select the copy and click on the Modify button.



5. In the next screen, set the following values in the General tab:

Name: Reappointment Letter Printer

Source: ImageNow Printer

Mode: Single

Send To: GS CONF TRAVEL XXX (as appropriate for your department)

Be sure that the checkboxes on this screen are NOT checked.

Reappointment Letter Printer

General Single Document Keys

General

Name: Reappointment Letter Printer

Description: Used by ImageNow Printer to capture objects in Single Mode (uses currently selected LearnMode Application Plan).

Type

Source: ImageNow Printer

Set as the default Printer profile

Mode: Single

Submit documents to Content Server

Workflow

Send To: GS CONF TRAV ART

6. In the Single tab, set the Application Plan to WWALK - GS SRF Form.

This is the new Application Plan to be used with Google Chrome beginning May 2021.

GS CONF TRAVEL PRINTER

General Single Document Keys

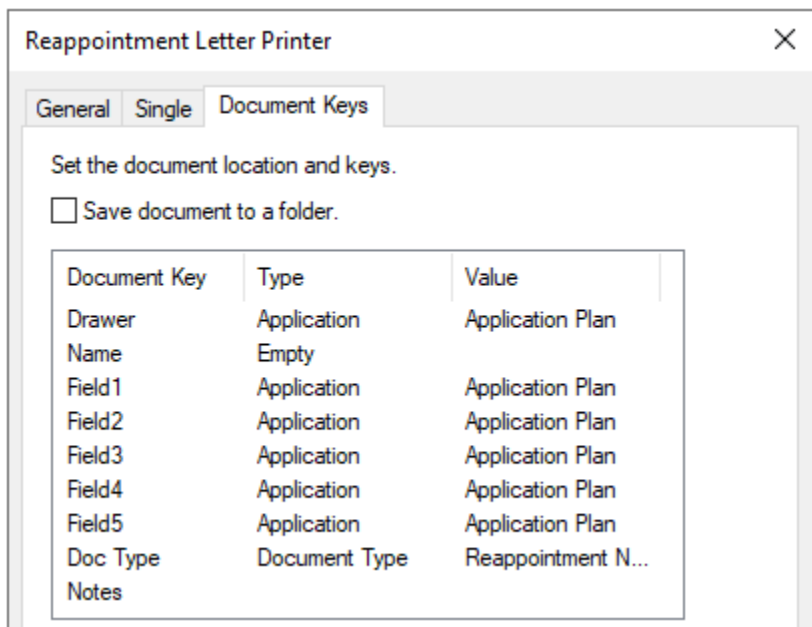
Type: [Empty dropdown]

Application Plan: WWALK - GS SRF Form

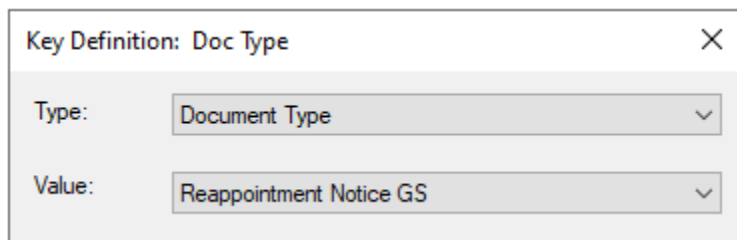
Enable automatic processing

Be sure that the checkbox on this screen is NOT checked.

7. In the Document Keys tab, confirm that Type and Value are set as below.

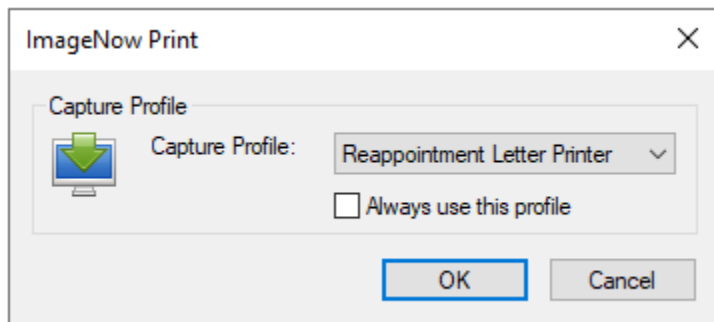


If you need to change the Doc Type, double click on the row to open the editing window. The value of Doc Type should be set to Reappointment Notice GS.



8. Click on the "OK" button and then on the "Close" button.

You should now be able to choose this capture profile when using the ImageNow printer.



Please contact grad-support@duke.edu if you need help with this process.