

Duke University Graduate School



**Admissions ImageNow Training
September 2009**

Graduate School Paperless Application Process

Starting with the Spring and Fall 2010 applications, you will receive all Graduate School applications for admission electronically. There will be no more paper files to pick up, review, and return. The purpose of this training session is to educate a department representative in the tools needed to review and register decisions on applications.

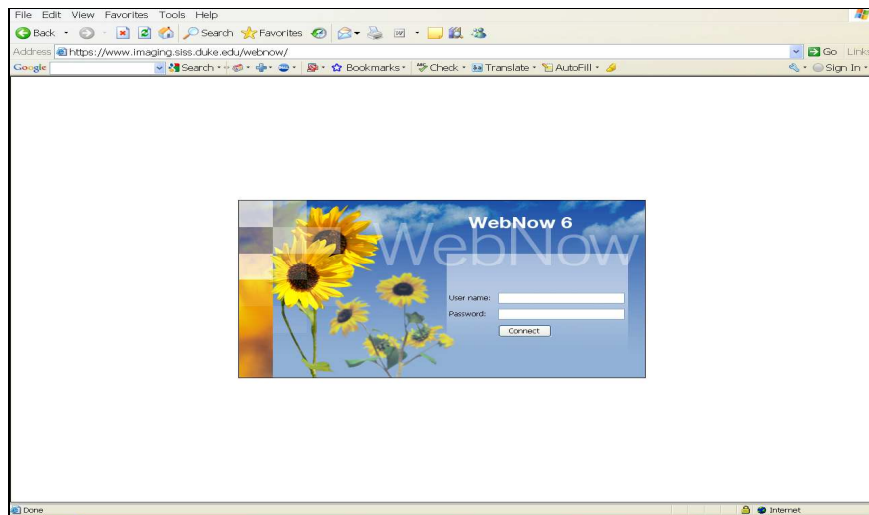
ImageNow or WebNow?

ImageNow is the document imaging system the Graduate School uses for the capturing, storing, and processing of documents and related data. There are 2 different installations of this product:

- The version installed on the workstation (often referred to as the client version) is referred to as ImageNow. This installation will primarily be used by the Director of Graduate Studies Assistants (DGSA's).
- The web-based version of ImageNow is WebNow and it provides users the ability to view and process documents via a web browser. The Webnow version is used by Directors of Graduate Studies (DGS), Reviewers and DGSA's.

For this training session we will use the web based version WebNow. WebNow can be accessed at:

<https://www.imaging.siss.duke.edu/webnow/>



Access & Security

All users access ImageNow and WebNow using their NetID and NetID password. For questions or information about admissions, the admissions process, using ImageNow/WebNow, and security request/changes, please contact the Graduate School at:

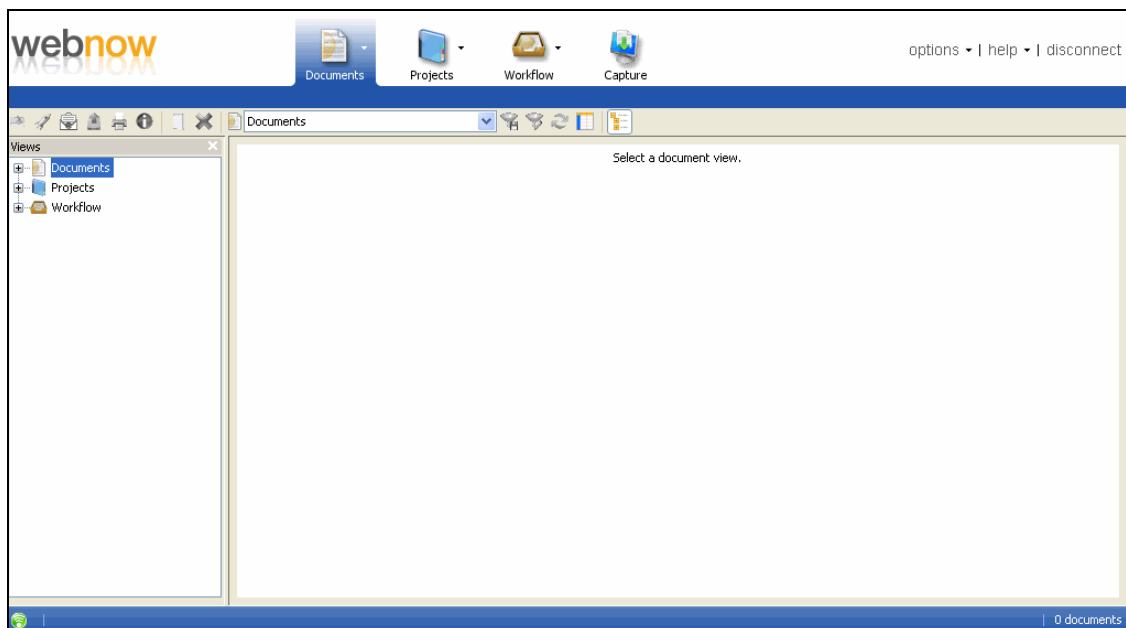
grad-imagenow@duke.edu

To report system or technical problems, please contact the OIT HelpDesk:

OIT Help Desk
02 Bryan Student Center
West Campus
Phone: (919) 684-2200
Fax: (919) 684-4400
Email: help@oit.duke.edu
<http://www.oit.duke.edu/help/>

Log-In to WebNow

After Login you should see the following Screen:



The WebNow Toolbar

The WebNow toolbar provides a direct link to the functionalities that a user has security to use. The items listed on your toolbar should include:

- **Projects:** A Project is a virtual folder that contains an application and all the supporting documents. Clicking on this icon will take you to the window where you can search for existing applications for your department.
- **Workflow:** Your department's workflow consists of a set of queues that contain all of your projects that have been processed. A queue is a storage area that contains projects for your department. Each department has a set of basic queues. Applications not yet processed by the Graduate School will not appear in these queues (there is a way to view applications not yet processed that will be discussed in a later section). Clicking on this icon will display your workflow. It is within this workflow where you review and make decisions on applications.
- **Capture:** This function is used by the Graduate School to convert paper application materials into electronic images.
- **Help:** Although this is not listed on the toolbar, it is listed on the screen. Clicking on 'Help' will provide documentation designed to help in the use of ImageNow and WebNow.
- **Disconnect:** Like the Help function, Disconnect is not listed on the toolbar. Clicking on Disconnect logs you out WebNow. It is important to do this every time you finish with a WebNow session because just closing the browser window will not end your session.

The WebNow viewer window provides access to projects and workflow queues. Within these views, a user can access each of the related items that are available for their security access. Let's start by taking a look at the different parts of a project (application). The first thing that has to be done is locate your department's projects.

Open the Workflow

- Click on the Workflow icon contained in the toolbar. The queues listed in the 'views' pane are the queues in which all of your decision making will occur.
- Click on the Application queue – This results in your department's applications being displayed.
- Double click on one of the projects listed – The contents of the project are displayed in the project viewer window.

Components of a Project

Documents

- **Application** – The application document contains all of the materials that are submitted as part of the online application.

- **Official Transcript** – This document will contain all of the applicant’s official transcripts received by the Graduate School. Where applicable, this document will contain more than one transcript.
- **Unofficial Transcript** – This document will contain all of the applicant’s transcripts received by the Graduate School that have been identified as not official. This will not contain the transcripts the applicant uploads with his/her application and like the official transcript document, it also may contain multiple transcripts.
- **Official Recommendation** - This document will contain all of the official recommendations submitted for the applicant.
- **Unofficial Recommendation** - This document will contain all of the recommendations submitted for the applicant that the Graduate School has identified as unofficial.
- **Test Scores** – This document will contain any paper copy of test scores that were mailed to the Graduate School. Official GRE/TOEFL scores will continue to be received from ETS and will not be in this document.
- **Statement of Purpose** - The statement of purpose document will only be in the project if the applicant has sent in a copy to the Graduate School separate from the online application. The original statement of purpose that in most cases is submitted with the on-line application will be contained in the application document and not in this document. In most cases this document will not be in the project.
- **Visa Document** - This document will be present if the applicant sent visa supporting documents with their application materials. Most of the time this document will be created after the applicant accepts an offer of admission and must provide financial material for visa purposes.
- **Writing Sample** – This document type contains any paper copy writing samples sent to the Graduate School.
- **Miscellaneous** -The miscellaneous document contains all documents that do not fall in the above categories.

The Worksheet

The worksheet is a system generated summary and work area of the project that is displayed upon opening the project to view. The worksheet contains 3 main sections:

- **The Control Sheet** -- This section provides a summary of the applicant’s information, schools attended, GPA, test Scores, and more.
- **The Department Decision** – It is in this area that the admission decision information is entered and approved.
- **The Checklist** – This section is used by the Graduate School when performing the final check prior to offering admission.

Viewing Documents within the project

The next step is to open and view documents contained within the project.

Changing the view of a document

Double clicking on any one of the documents within the project will open up the document. Once inside the document, you may want to change the document's appearance for readability. The following is a list of commonly used features to temporarily alter the documents appearance:

View the Thumbnails

- From the 'View' pull down, select **Thumbnails** to view both the document and the thumbnails.
- If the Thumbnails pane is minimized click on the Thumbnails tab to open the window.

Resize a Document

- From the 'View' pull down, select **Resize**.
- Choose the viewing option you prefer. (Fit Window, Fit Width, Fit Height).

Rotate a Document

- From the 'View' pull down, select **Rotate**.
- Select desired rotation.
- Click on View again – this next step will save the rotation of the document.
- Select **Rotate**.
- Save to Server.

Zoom in an out of a Document

- From the 'View' pull down Select **Zoom in** or **Zoom out**.
- Click on the **Zoom in** or **Zoom out** icons on the toolbar.

Annotations

WebNow provides the ability to make annotations on a document. The Annotations you have available are the Sticky Note, the text box, and a yellow highlighter. Annotations can be a very useful tool for communication between committee members.

Please Note: Careful consideration is needed when using this feature because annotations in documents for admitted students become a part of their permanent record. In the case of denied students who wish to reuse supporting documents for future applications, any annotation made will remain on the document.

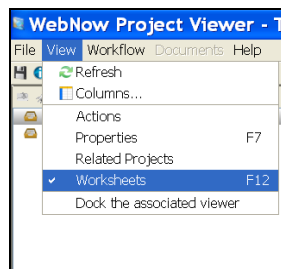
Annotate a File

- Using the Annotation tool bar, hover your cursor over an annotation to display what the annotation is. Right click to see the options available (color, style, type, etc.).

- To use an annotation, click on the desired annotation then move the cursor to the location you want annotated in the document. Release for basic annotation or drag for highlight.
- Text and Sticky Note annotations will open boxes for entering text. Once you have entered the data select OK.

Examining the worksheet

If the Worksheet is not displayed upon entry into the project, from the 'View' pull down, select worksheets – this will result in an additional pane being displayed in the project viewer window



Note: The Worksheet is only viewable at the project level and will not be displayed when viewing individual document types.

- In the previously opened project, click on the worksheet tab to view the worksheet.
- Click on the words '**Control Sheet**' located in the midsection of the worksheet to bring up the Control Sheet.
- The summary of the application is displayed. The scroll bars can be used to navigate vertically and horizontally.
- For the GRE scores:
 - ETS or AGR listed indicates the scores are official.
 - SLF indicates the scores are self reported and, therefore, unofficial.
- Click on the words '**Department Decision**' located in the midsection of the worksheet to bring up the screen where the admission decision is entered. Note that while navigating throughout the worksheet, the applicant's information on the top of the screen remains the same.
- Click on the word '**Checklist**' located in the midsection of the worksheet to bring up the Control sheet (Note: You are able to view this part of the worksheet but this is used for Graduate School administrative processing only). It is within this section that you can view any condition placed on an offer of admission.

Reviewing Your Applications

The Graduate School takes an application and the supporting materials and creates the project. Projects are then routed to your department and put in the Application queue in your workflow. It is within this workflow that the application will be reviewed and decisions will be entered. The project will then be routed back to the Graduate School for approval and applicant notification. If a project is not in your workflow, while you are able to view it through the project viewer, you cannot make any decision recommendations.

- **Decisions can only be made on projects that are in your workflow. The Graduate School will send projects to the departmental workflow once they have the following documents: on-line application, undergraduate transcript (official or unofficial), test scores (GRE, GMAT or MCAT), and at least one recommendation (official or unofficial).**

Graduate School → Application => Review => Complete => Approved → **Graduate School**

Your department's 5 basic queues:

- **Application Queue** – Applications are delivered to your department in this queue and it serves as an initial work area. When the application is ready to be distributed to the admissions committee, the project will be routed forward to the Review queue.
- **Review Queue** – It is in this queue that admission committee members will review the application. This is the only queue where committee members other than the DGS/DGSA will have security access. Committee members can view the application but not route it forward. After the review is completed by all committee members, the project is routed forward to the Complete queue by the DGSA or DGS. After the review is completed, the project is routed forward to the Complete queue
- **Complete Queue** – Applications are sent to this queue from the Review queue for entering either an admit, deny or waitlist decision. The application is then routed to the Approval queue for DGS approval
- **Approval Queue** – It is within this queue that the DGS approves the decision. Decisions can be entered in both this queue and the Complete queue.
- **Waitlist Queue** – Applications are placed in this queue by the Graduate School after being routed through your workflow with a decision of waitlist and the Graduate School has notified the applicant he/she has been placed on a waitlist. Once the applicant has been notified, the application will be returned to your Waitlist queue until a final decision is made. You will need to monitor this queue and make the final ADMIT/DENY decision for this application.

Customize the Workflow Viewer Window:

- To change what viewer window panes are displayed click on the Hide/Show Views icon.
- To refresh a grid click on the Refresh icon.
- Click on the Columns icon to change the column headings displayed and select or clear each column heading.
- Sort by a particular column by clicking on the column heading.

View History:

- You may view the history of a project in one of two ways. First, you may click on the “i” in a blue circle on the toolbar, or, second, right click on the project and select “properties” from the menu.

Process an application through the queues:

- Open up a project in the Application queue - each row in the grid represents a document in that project. Route the project forward (if you are not in the Application queue click on the Application queue listed in the ‘views’ pane).
- Click on the Review queue in the ‘views’ pane – and open up the project that was just routed forward from the Application queue.
- This is the queue where committee members will have access to the application. Route the project forward to the Complete queue.
- Click on the Complete queue in the ‘views’ pane – and open up the project you routed forward.
- Entering Decisions / Decision Reasons - the following are the possible decisions that can be entered on the Worksheet.
 - [Admit](#)
 - [Deny](#)
 - [Waitlist](#)
 - [Withdrawn](#)
 - [Incomplete Application](#)

In addition to entering the decision, a decision reason must also be entered. In the case of an admission, this reason will be used to determine what type of award letter the Graduate School will send along with the offer of admission. The DGS and DGSA can enter the decision on the Worksheet in either the Complete or Approval queue.

- On the worksheet, in the Department Decision section, enter a decision and route the project forward.
- Updating a Decision - To change a decision, Select "Decision Not Made" from the drop down list to reset the decision. Then choose a new decision, close the application project to save then route the project forward.
- Click on the Approval queue in the ‘views’ pane – and open up the project you routed forward.
- On the worksheet, in the Department Decision section, click on the ‘Decision approved by’ box and route the project forward. This routes the project on to the Graduate School for applicant notification and further processing.

Sample Processes for Reviewing Applications

Due to the number of programs offered and the various processes used to review applications, there is not one 'right' process. So instead of providing you with one set way to review and make decisions, you have been given the tools (a set of queues) to use for customizing your own process.

The basic requirements for your process are that all applications must go through 4 queues - Application, Review, Complete and Approval and the decision must be approved by the DGS before the project is routed to the Graduate School.

One possible way to review applications in your department could be using email and go something like...

1. Applications arrive in the Application queue. DGSA identifies what committee members will review each application
2. DGSA routes forward the applications to the Review queue and sends email to committee members informing them applications are ready to review. The email contains a link to WebNow and identifies the applications that should be read by the specific committee member.
3. Committee members finish review and emails DGSA with recommendations. DGSA routes the projects forward to the Complete queue.
4. In the Complete queue, the DGSA enters the decisions on the Worksheets and routes them forward to the Approval queue.
5. DGS approves the decisions on the worksheets and routes the project forward – which results in the project being returned to the Graduate School.

Other possible methods include using

Paper evaluation forms

Group reviews

Download grid to Excel and use for tracking reviews and evaluation information.

Grouping Applications in the Review Queue

A method of grouping applications to make the assigning to a reviewer easier is provided. A data entry field called 'Dept Field' is available for you to enter in a value (or tag) in order to group the application to best fit with your review process.

Tag the application

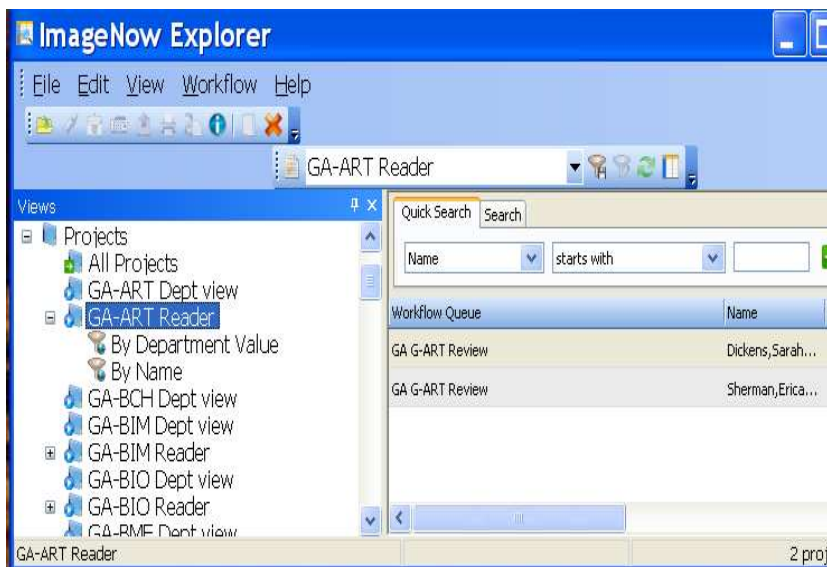
Tagging of the application can be done in either the application queue or the review queue while in the workflow and can only be done by the DGSA or the DGS.

- Open the application in the 'Application Queue'.
- Display the Custom Properties by clicking on 'Properties' in the View drop down menu.
- In the 'Dept Field' enter the value you want to assign to this application (faculty name, sub-specialty, color code, etc.) and close the document.

Note: It is imperative that you do not change any other field in the properties. We recommend that after you have set the value for 'Dept Field' to uncheck the 'Properties' in the View drop down.

View / sort the applications by your department defined field:

- Click on the Projects icon located near the top of the screen. You should now see 'GA – xxx Reader' where xxx is the three letter code for your department (BUS for Business, BIO for Biology, etc.) on the left hand side of your screen.
- Clicking on 'GA-xxx Reader' results in 2 additional choices being displayed: 'By Department Value' and 'By Name'.



- 'By Department Value' allows you to view only those applications that match the value entered. After clicking on 'By Department Value', you will be prompted to enter a value for the 'Dept Field'. This is where you would enter the value you defined in the Custom Properties.
- 'By Name' allows you to view individual applications by their name. A pop up window will prompt you to enter a name. Enter the last name or the beginning characters of the last name.
- Either search method will result in the applications meeting the criteria being displayed in the project viewer window.
- Not entering a value and clicking 'ok' will result in all of your department's applications that are ready for review being displayed.

Advanced Searching for Applications

As stated earlier, the most common way for you to work with applications is in your workflow queues. However, there will be times when you need to search for an individual application or a set of applications. This can be done within the project viewer window.

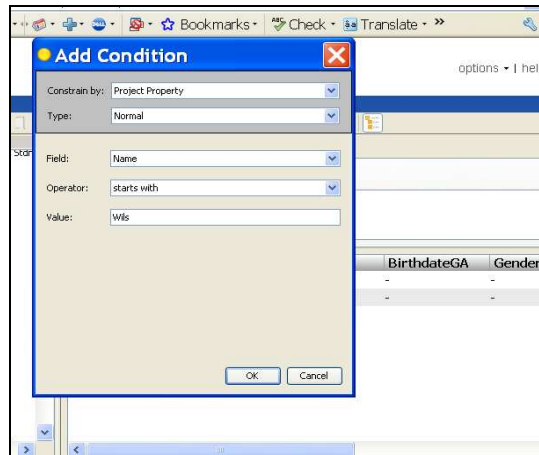
Searching for Projects (applicant folders):

The **Quick search** method, and probably the most common for you, will be used to search for projects.

- Click Projects on the toolbar and click your 'Dept view' on the viewer pane.
- You will receive a list of up to 500 projects.
- If you want to refine the results, Select the Quick Search tab.
- Choose **Name** for filter option - Projects are named in the following format: LastName,FirstName,Academic Plan,Admit term.
- Select the search parameter "**Contains**".
- Enter the value.
- Press Go.
- Projects that meet the search criteria will appear in the viewer window.
- Each row in the grid represents a project that is in WebNow.

The **Advanced** search method allows a user to search using more specific criteria. Searches that need to be performed on a regular basis can be created and saved. These saved searches are called filters.

- Click Projects on the toolbar and click your 'Dept view' on the viewer pane.
- Select the Search tab.
- Click on the Green + sign – a pop up window will be displayed where you can enter specific search criteria and click OK.
- Projects matching your search criteria will be displayed.
- To save the search criteria click on the 'Save private filter' icon and the search is saved in the Dept. View.



Customize the project viewer window:

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- To refresh a grid, click on the Refresh icon.
- Click on the Columns icon to change the column headings displayed and select or clear each column heading.
- Sort by a particular column by clicking on the column heading.

Cheat Sheet of Queues

By using the Project viewer, you can view projects that are not in your workflow (they are in a Graduate School workflow). By knowing what each queue is, you may be able to determine what stage of processing they are in. The following table can serve as a translation table from ImageNow terminology to English!

Queue Name	Stage of processing
GA Project Creation	Project has been received but there are insufficient supporting materials. The Graduate School will send projects to the departmental workflow once they have the following documents: on-line application, undergraduate transcript (official or unofficial), test scores (GRE, GMAT or MCAT), and at least one recommendation (official or unofficial).
GA GPA Calculate	Project is awaiting GPA calculation.
GA Schools not Listed	The application was submitted with an incorrect or missing school code.
GA Processing	Projects are in line to be processed.
GA Custom Prop Update Holding	Project is being verified.
GA QA of Data Entry	Project is being verified.
GA App Complete PS Routing	Status email is being sent to applicant – will be routed to departments within a day.
GA Non-Degree Admit Review	Extra review is required by Associate Dean.
GA PhD Admit Extra Review	Extra review is required by Senior Associate Dean.
GA Masters Admit Extra Review	Extra review is required by Associate Dean.
GA Admit – Standard	Admission has been approved by Graduate School – In the process of notifying applicant.
GA Admit – Conditional	Admission has been approved by Graduate School but has been changed to a conditional admit – In the process of notifying applicant.
GA Admit – Appl Dec Wait	Applicant has been notified – waiting on response (Accept/Decline).
GA Intent to Matr Foreign	Offer has been accepted – waiting on Webform request to be sent to student.
GA Visa Follow-up	Student has received Webform information – Graduate School is waiting on visa documents.
GA Matric Hold	Student is matriculated.
GA Decline Admission	Offer was declined.

Paperless / Paper Comparison

For those of you that are familiar with the previous paper process used by the Graduate School, the following chart may help.

Paperless process	Previous paper process
Project	The Project is equivalent to the paper file folder containing the application and all the supporting materials.
Application Document	This document contains everything the student submitted electronically with the online application. Which includes the 5 page application, the statement of purpose, and possibly uploaded transcripts, CVs, etc.
Recommendation Document	All the recommendations (both electronic and hard copies that are scanned in by the Graduate School) are contained in this document. There is an official and unofficial version of this document.
Transcript Document	All paper transcripts received by the Graduate School will be scanned and stored in either the official or unofficial version of this document. The copies of transcripts that are uploaded and submitted with the application are contained in the application document.
Test Scores Document	Paper copies of an applicant's TOEFL score reports and TOEFL waiver documentation.
Worksheet	The worksheet is basically the same as the colored paper control sheet that was in the front of every application.
Control Sheet Section	This section of the worksheet is roughly equivalent to the left side of the paper control sheet.
Department Decision Section	This section of the worksheet is roughly equivalent to the right side of the paper control sheet where decisions were entered.
<i>GRE Scores:</i> ETS or AGR listed on the Control Sheet mean the scores are official. SLF listed on the control sheet indicate the scores are self reported.	GRE scores were listed as either official or unofficial.

NOTES: