Duke Graduate School Committee Approval Form Upload to Perceptive Content

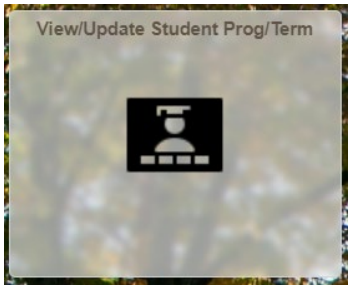
This document will outline the steps needed for a DGSA to submit committee approval forms to the Graduate School Office of Academic Affairs. Forms will be uploaded into Perceptive Content (formerly ImageNow) in a process similar to the Conference Travel Form upload process. Please see Appendix A for instructions on how to set up your Committee Approval Printer capture profile if you do not have one 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 Committee Approval Printer capture profile to the new settings.

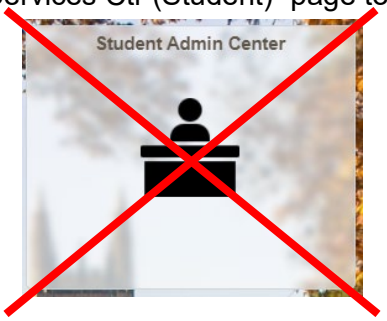
1. Prepare the form

   - Download the Committee Approval Form from the Graduate School website - Duke Graduate School > Academics > Academic Policies and Forms
   - Complete the form and save it as a Word or PDF document
   - Be sure to include minor area representative and justification
   - Close the internet browser that you opened to obtain this form
   - Keep the saved document open

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

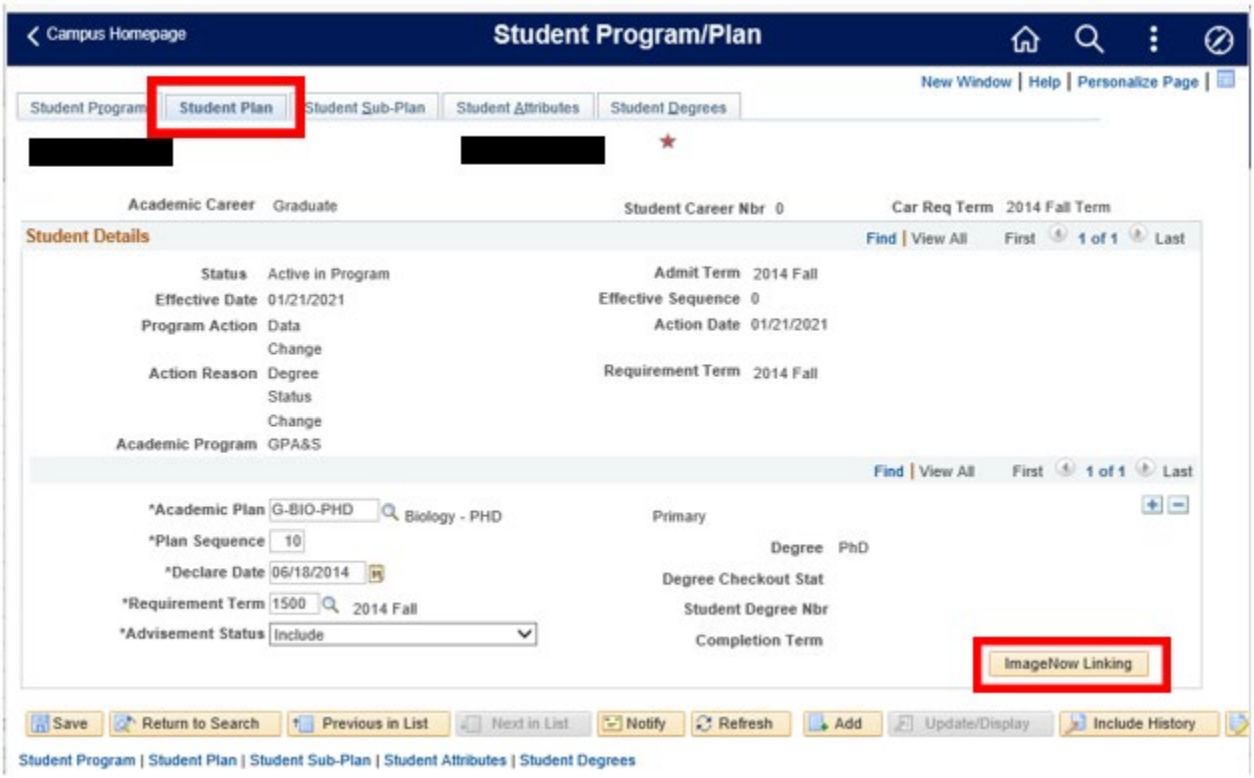
   - **Use Google Chrome only** . You can no longer use Internet Explorer .
   - Log in to PeopleSoft with your netid and netid password. If you are not on campus, make sure you are connected to the Duke VPN.
   - Navigate to the Student Program/Plan page. You can do this by using the "View/Update Student Prog/Term" tile or by using the NavBar Navigator and selecting: Records and Enrollment > Career and Program Information > Student Program/Plan. **DO NOT** use the "Student Admin Center" tile or the "Student Services Ctr (Student)" page to access Student Program/Plan.





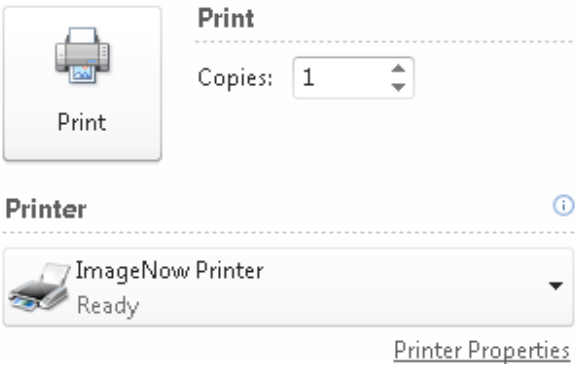
   - Enter the student's emplID
   - Check "Include History"
   - The student's record will be returned – if multiple rows are displayed, choose a row from the list with the correct Career and Program
   - Choose the Student Plan tab (second tab from left to right)
   - Verify the Academic Plan is correct. If not, press the "Next in List" or the "Previous in List" buttons at the bottom of the page until you see the desired Academic Plan.

- Click on the ImageNow Linking button in PeopleSoft in the Student Plan (you will need to click on it every time you have a new student).

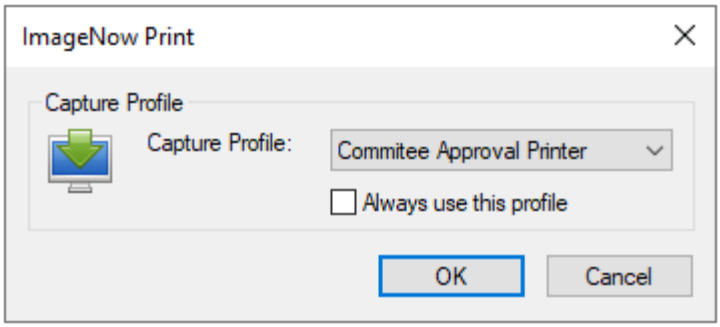


3. Capture the form into Perceptive Content (ImageNow)

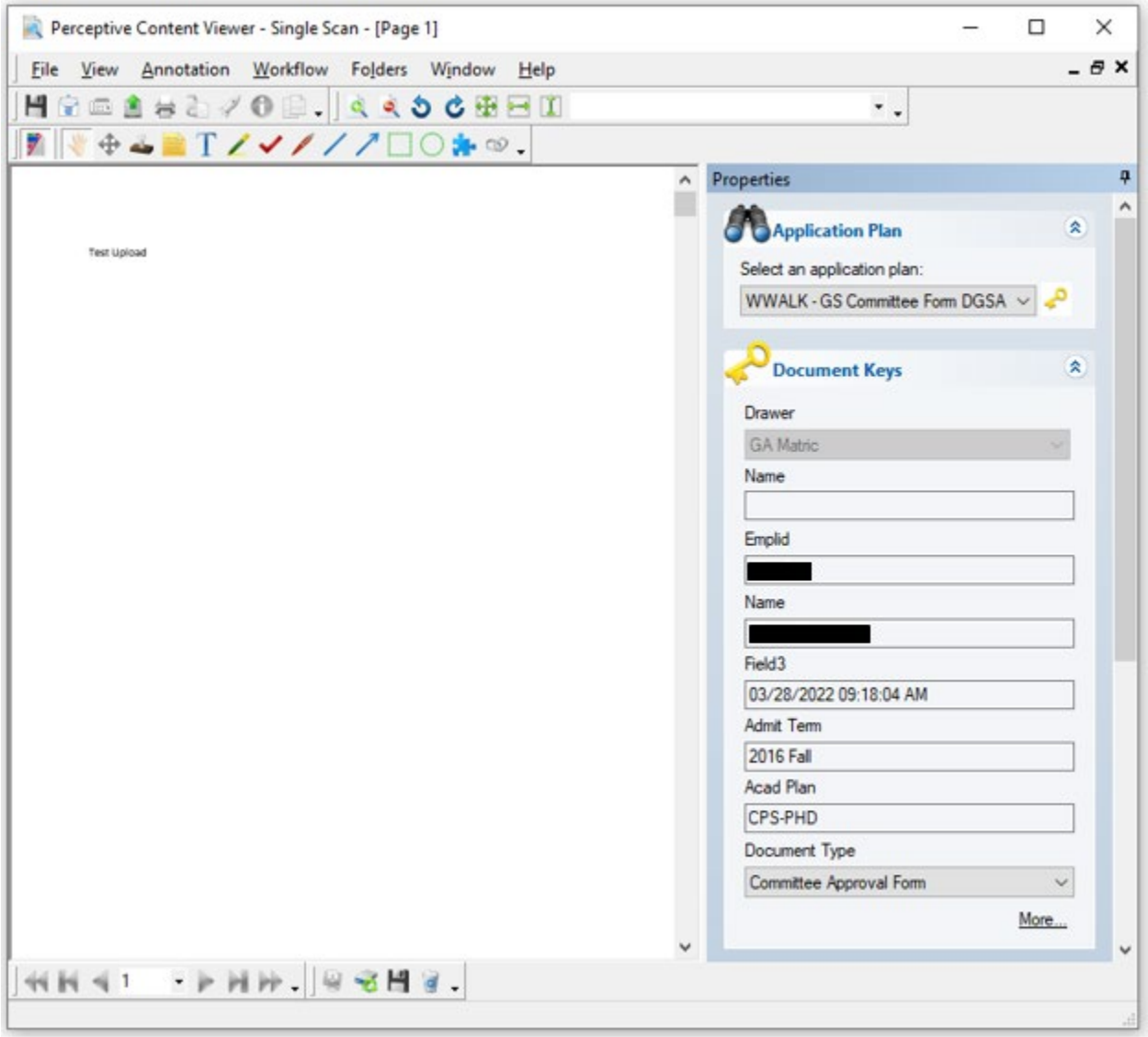
- Open the Perceptive Content client and log in using your netid and netid password.
- From the Committee Approval Form document, choose File > Print, choose the ImageNow Printer, and click Print.



- When the Capture Profile window opens, choose the Committee Approval Printer capture profile. (Please see Appendix A if you do not have this capture profile, or if you have used the ImageNow Printer – Single Mode capture profile in the past.) Click OK.



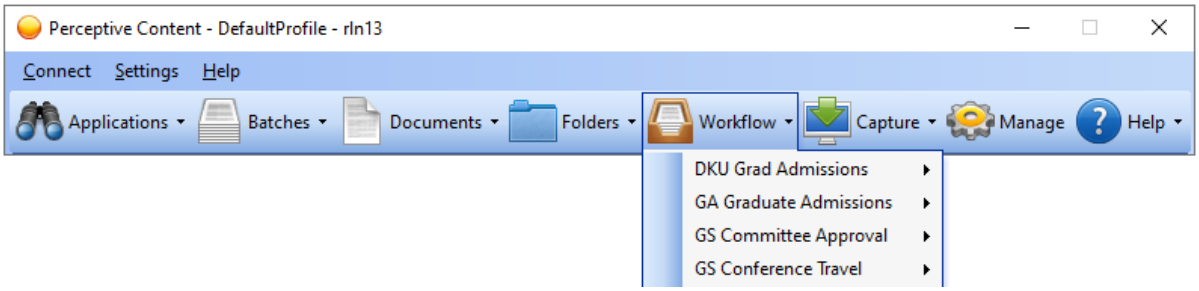
- When the document appears, verify that the student's information has populated in the right panel, as below.
- Click Save. Please be sure to save the scanned document before going on to the next step.



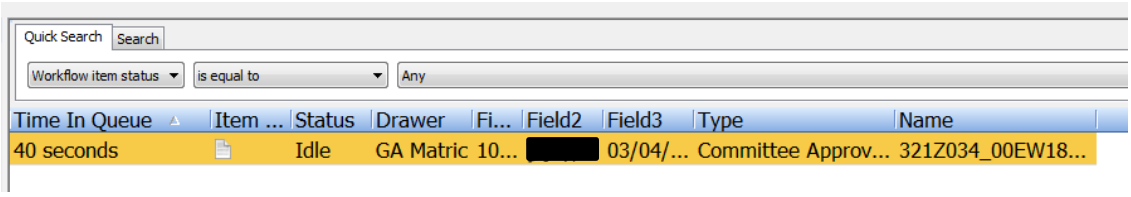
- If you do not need to upload any additional documents, you can close the Committee Approval Form document and PeopleSoft.

4. Route the form to the DGS using the Perceptive Content Workflow

- In Perceptive Content, click on the arrow next to Workflow, choose GS Committee Approval, and then your workflow queue (GS XXXX DGSA).



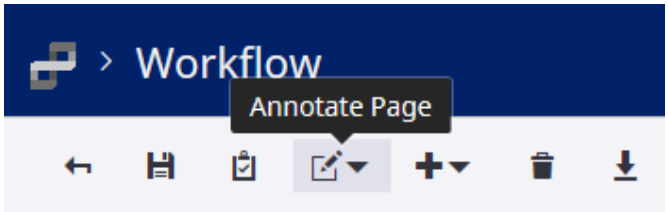
- Documents needing processing will appear in the Perceptive Content Explorer window with index values (name, student id, etc.) in the columns. To open a document, double click on a particular row.



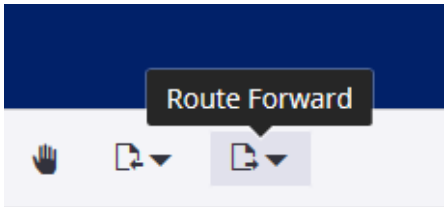
- When the document opens, review the form for accuracy and then forward it to the DGS workflow queue. To forward the form, choose the blue arrow at the bottom of the page (Route Forward), choose the DGS workflow queue (GS XXXX DGS), and click Route.

5. The DGS approves and routes the form using Perceptive Experience

- The DGS should access Perceptive Experience at https://experience.siss.duke.edu/
- The DGS should review the form in Workflow, and add a stamp with userID and date for approval. To add the stamp, select the Annotate Page icon at the top of the page, move the mouse (do not drag) to the line on the form where the stamp should appear and click again. The approval stamp should appear on the form.



- The DGS should then forward the form back to the DGSA. To forward the form, select the Route Forward icon at the top of the page, and choose the DGSA workflow queue (GS XXXX DGSA).



6. The DGSA routes the form to the Graduate School

   - Once an approved form arrives back in the DGSA queue, review the form and route it forward to the GS Judy 1st Review queue.

7. The Graduate School processes the form

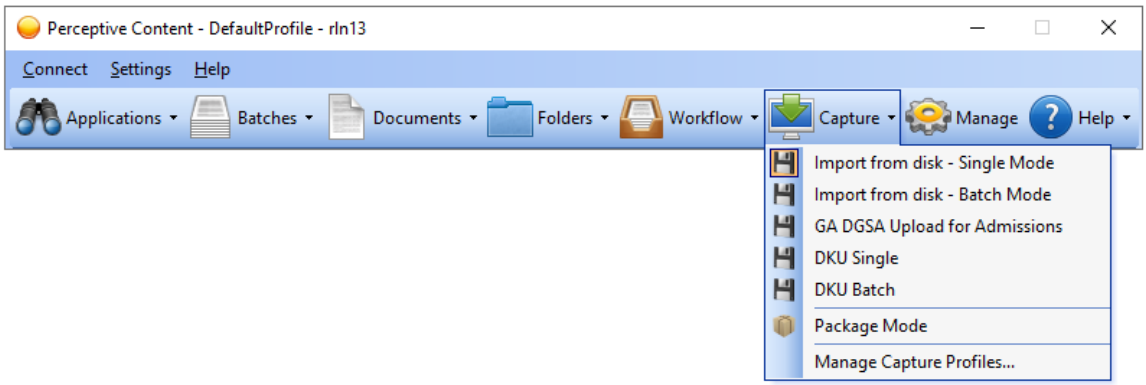
   - If the form is not correct or complete, it will be deleted. The DGSA will be asked to make the necessary corrections and re-upload the form.
   - Once the form is correct and complete, it will be forwarded to Dean Klingensmith for his approval and signature.
   - Once Dean Klingensmith approves the form, it will be appended to the student's file. A copy will also be emailed back to the DGSA.
   - The Graduate School will also update the student's record in PeopleSoft.

APPENDIX A:
Creating the Committee Approval Printer Capture Profile (DGSA only)

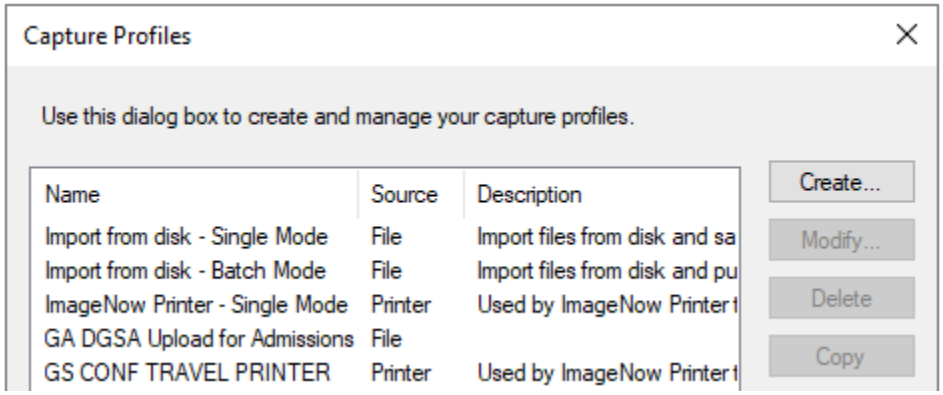
NOTE: In the past, DGSAs have used the ImageNow Printer – Single Mode capture profile to upload Committee Approval forms. You may continue to use this if you wish, as long as your ImageNow Printer – Single Mode capture profile is set up as shown below. (When you first install the Perceptive Content client, this capture profile will not be configured this way.) If you are new to the system, we recommend creating a dedicated capture profile just for committee approval forms.

1. Log in to Perceptive Content.

2. 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.

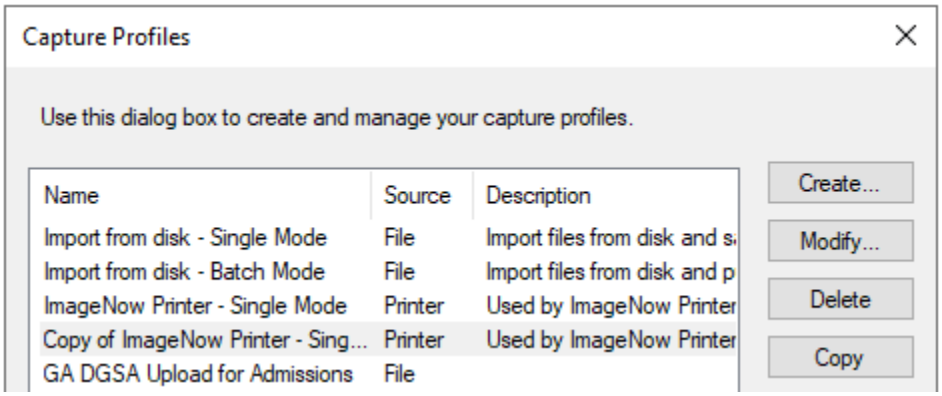


4. Select the capture profile.

   a. If you already have a Committee Approval Printer capture profile, select it and click on the “Modify” button.

   b. If you are do not have a Committee Approval Printer capture profile, select the “ImageNow Printer – Single Mode” capture profile and click on the Copy button.

   The copy of the ImageNow 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:

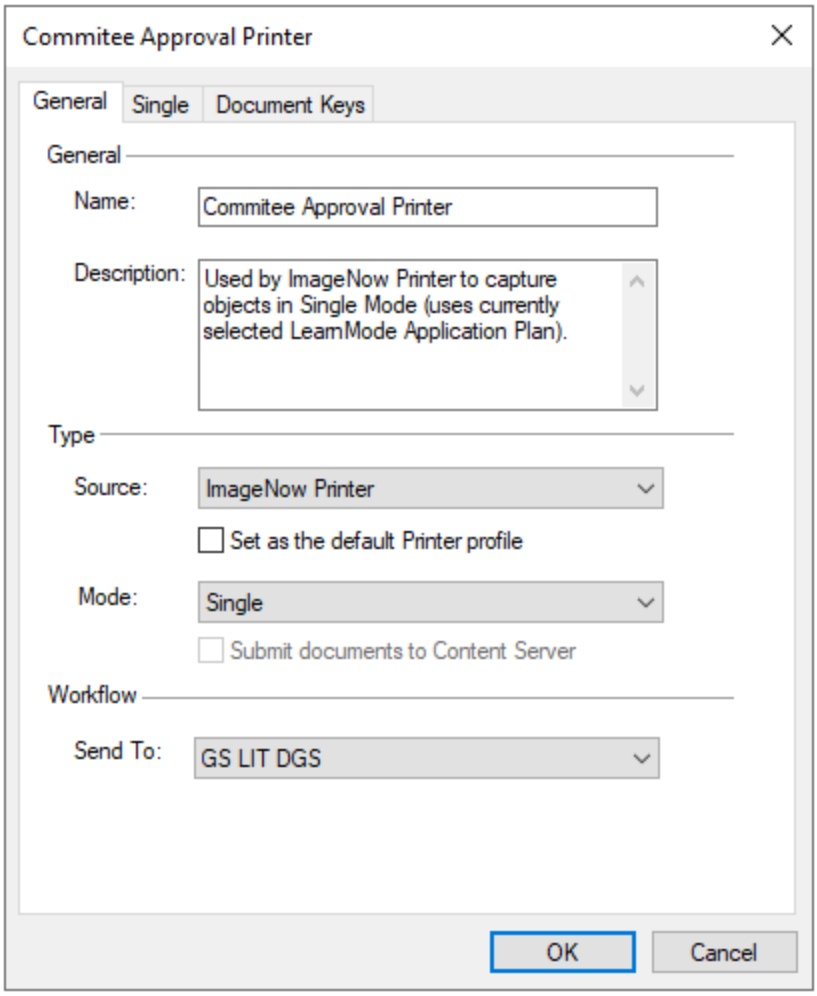
   Name: Committee Approval Printer

   Source: ImageNow Printer

   Mode: Single

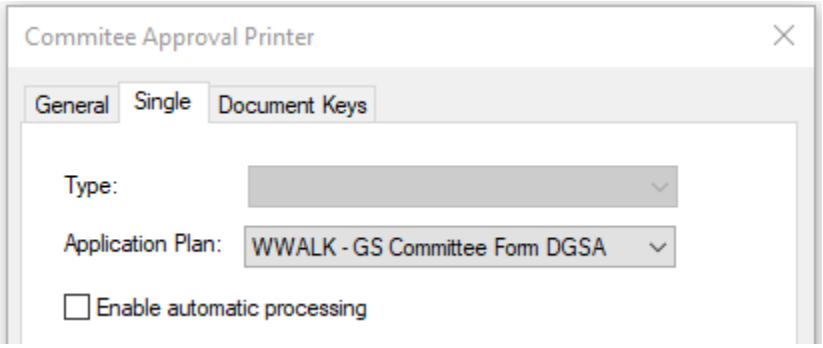
   Send To: GS XXX DGSA (as appropriate for your department)

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



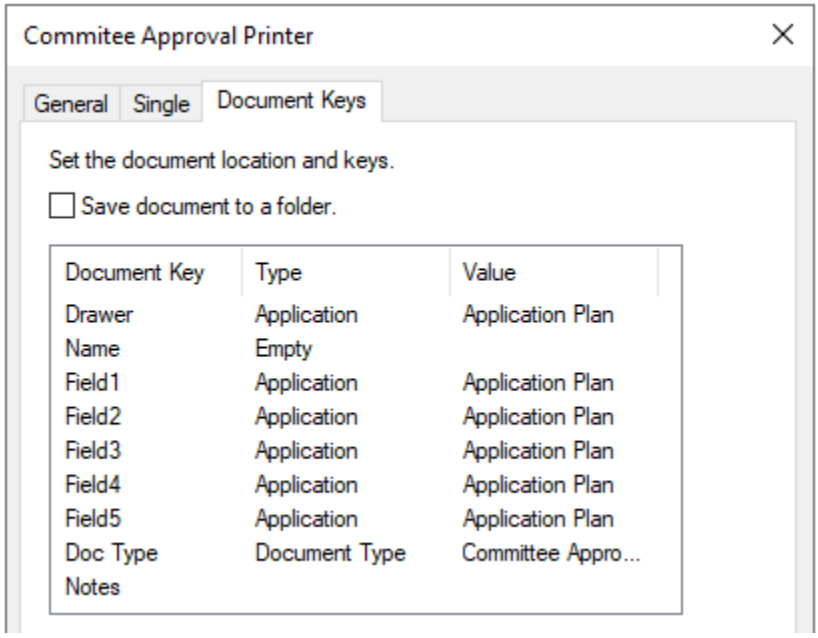
6. In the Single tab, set the Application Plan to WWALK - GS Committee Form DGSA.

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

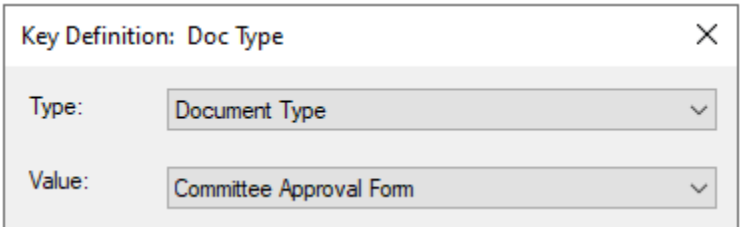


   Be sure that the checkbox on this screen is NOT checked.

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

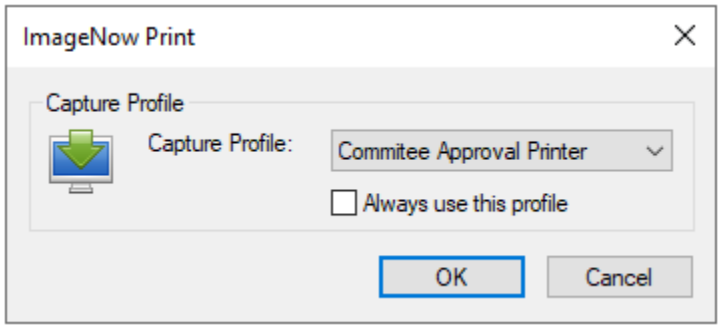


If you need to change the Doc Type, double click on the row to open the editing window. The value of Doc Type should be set to Committee Approval Form.



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 Image Now printer.



Please contact Matthew Jones (matthew.d.jones@duke.edu) in the Duke Graduate School Office of Academic Affairs for any questions regarding the processing of the forms. Access requests or setup assistance should be directed to grad-support@duke.edu.