Duke Graduate School Conference Travel Form Upload to Perceptive Content

This document will outline the steps needed to upload conference travel forms into Perceptive Content (formerly ImageNow). Note that this process is for PhD students only. The conference travel form will be processed by the Graduate School Office of Finances and stored as part of the electronic student record. This process is similar to the Committee Approval Form upload process. The difference is that this process uses the Conference Travel capture profile. See Appendix A for instructions on how to set up the GS Conference Travel Printer capture profile if you do not have it already. Please see Appendix A to adjust your GS Conference Travel Printer capture profile to the new settings.

1. The PhD student will complete the conference travel form. The form can be located by clicking this link: https://gradschool.duke.edu/sites/default/files/documents/conftrav.pdf Once the form is completed the student will submit the form to their department for approval.

2. The DGS will verify and sign the conference travel form manually and provide the signed document to the DGSA for upload into Perceptive Content.

3. The DGSA will scan the form, save it as a PDF, and process it as follows.

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

   **Use Google Chrome** **or Mozilla Firefox Browser**

5. 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.
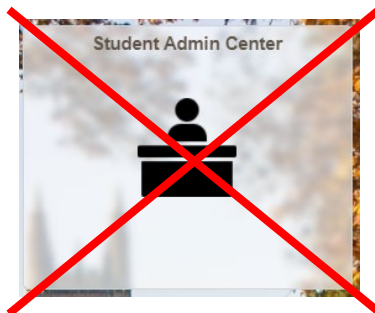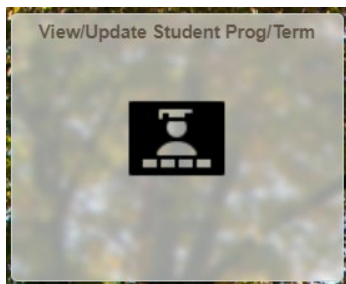

   a. Enter the student's emplID
   b. Check "Include History"
   c. The student's record will be returned – if multiple rows are displayed, choose a row from the list with the correct Career and Program
   d. Choose the Student Plan tab (second tab from left to right)

e. 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.

f. 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).
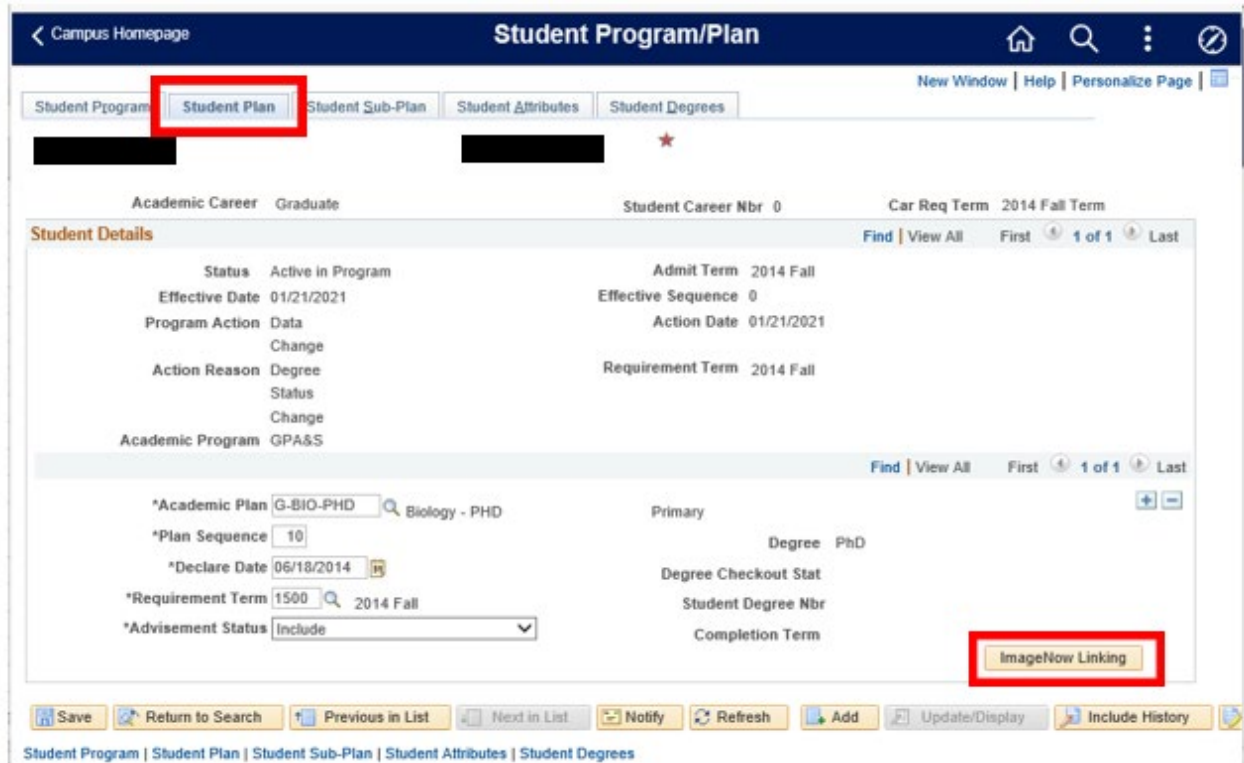
6. Capture the form into Perceptive Content (ImageNow)

a. Open the Perceptive Content client and log in using your netid and netid password.

b. From the Committee Approval Form document, choose File > Print, choose the ImageNow Printer, and click Print.
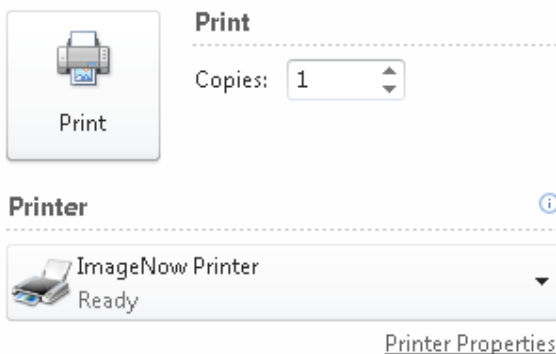
7. When the Capture Profile window opens, choose the GS Conference Travel Printer capture profile. See Appendix A if you do not have the GS Conference Travel Printer capture profile.
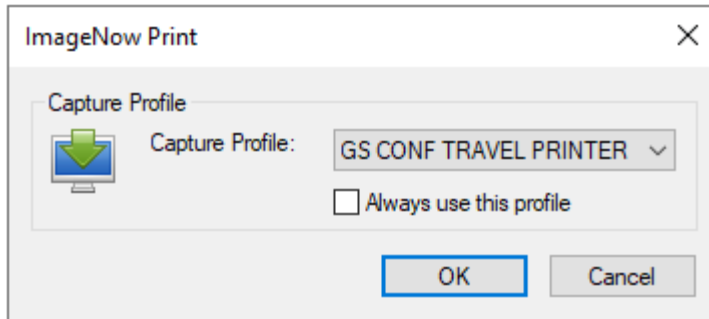
8. When the document appears in the Perceptive Content Viewer, verify that the student's information has populated in the panel on the right. Check that the Document Type is Financial Support GS and then save the document.

9. The Conference Travel Printer will import the document into the GS CONF TRAVEL XXX queue specific to your program. The DGSA must then go to that queue and forward the document to The Graduate School for processing and approval. To route a document, click on the icon with the blue arrow at the bottom of the Perceptive Content Viewer window.


10. The Office of Finance will process the form, append it to the electronic student record in Perceptive Content and notify the awardee and the DGSA via email. Any form with missing information will be returned to the DGSA for corrections.

APPENDIX A:
Creating the GS Conf Travel Printer Capture Profile (DGSA only)

1. Log in to Perceptive Content.

2. Click on the arrow next to the word "Capture" and the panel below will appear.
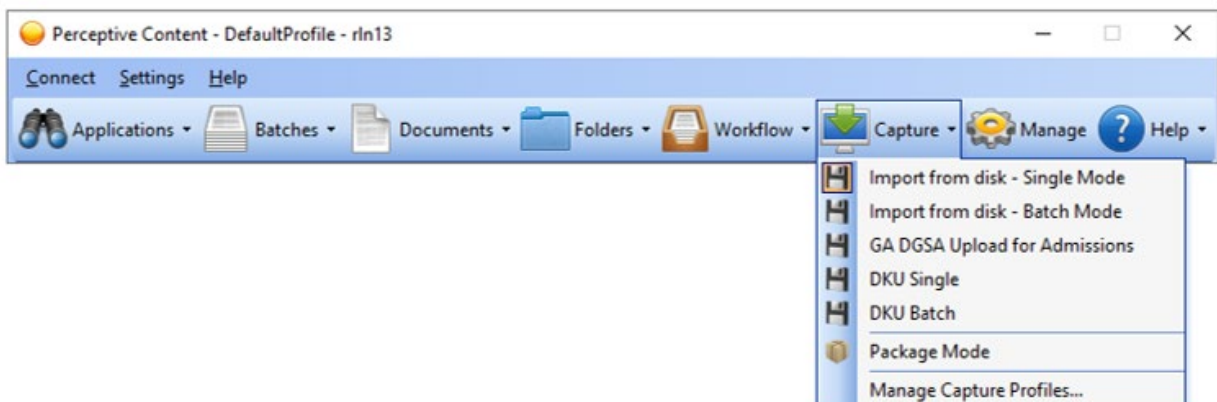
3. Click on "Manage Capture Profiles" and the following window will open.
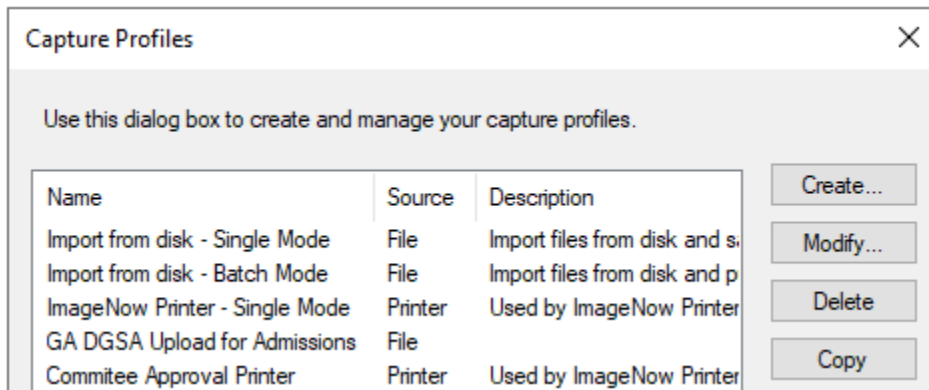
4. Check first to see if you already have a capture profile called GS CONF TRAVEL PRINTER. If you do, simply select it and click on the Modify button to confirm that your settings are set as shown below. If you do not already have the GS CONF TRAVEL PRINTER capture profile, you will need to create one. 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.
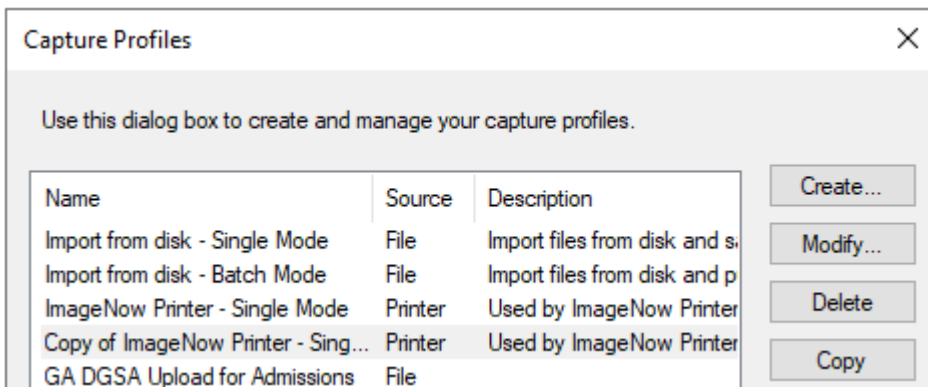
5. In the next screen, set the following values in the General tab:

Name: GS CONF TRAVEL 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.

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.

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.
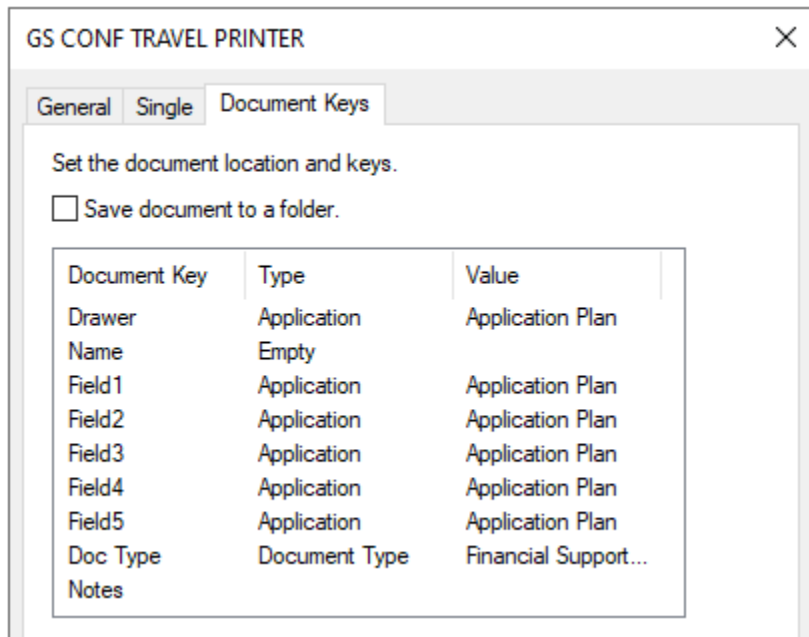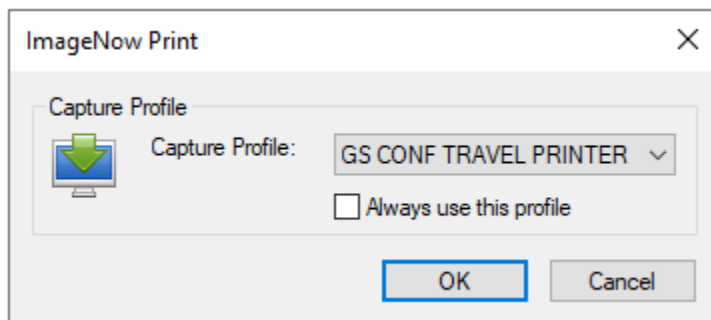

If you need to change the Doc Type, double click on the row to open the editing window. The value of Doc Type should be set to Financial Support GS.
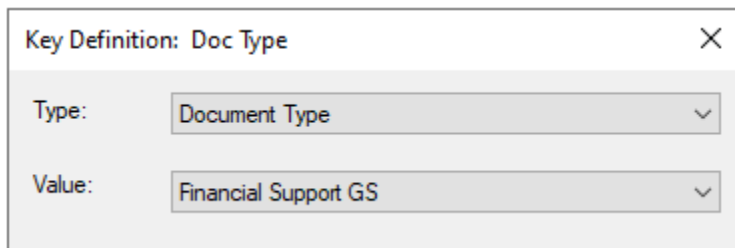
8. Click on the "OK" button and then on the "Close" button.

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.