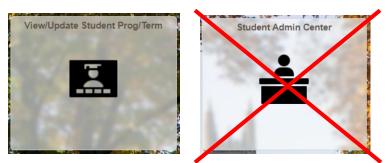
Duke Graduate School Conference Travel Form Upload to Perceptive Content

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).



 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).

Campus Homepage	Student	t Program/Plan		ធ	Q		(
			New Windo	w Help	Persor	nalize Pag	je
Student Program Student Pla	n Student Sub-Plan Student Attributes	Student Degrees					
		*					
Academic Career	Graduate	Student Career Nbr 0	Car Req Term	2014 F	all Term		
tudent Details			Find View All	First	1 of 1	Last	
Status	Active in Program	Admit Term 2014 Fall					
Effective Date	01/21/2021	Effective Sequence 0					
Program Action		Action Date 01/21/2021					
	Change	Requirement Term 2014 Fall					
Action Reason	Status	Requirement Ferm 2014 Fall					
	Change						
Academic Program	GPA&S						
			Find View All	First	3 1 of 1	🛞 Las	đ.
*Academic Plan	G-BIO-PHD Q Biology - PHD	Primary				+ =	1
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		completion renn		ImageN	low Linkin	g	
Save @ Return to Search	T Previous in List	Notify 2 Refresh	d F Update/Dir			ide Histor	

- 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.

	Print		
	Copies:	1 ‡	
Print			
Printer			0
ImageNo Ready	ow Printer		•
		Printer Pro	perties

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.

ImageNov	v Print	×	
Capture F	Profile Capture Profile:	GS CONF TRAVEL PRINTER ~	
		OK Cancel	

- 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.

Perceptive Content - DefaultProfile - rln13				-		×
Connect Settings Help						
Applications • 🦲 Batches • 📄 Documents • 💼 Folders • 🎧 Workflow •	2	Capture	@	Manage	?	Help
		Import fro Import fro GA DGSA I DKU Singli DKU Batch Package N Manage C	m disk - Upload fo e 1 10de	Batch M or Admi	lode	

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

Capture Profiles			×
Use this dialog box to create and n	nanage vou	ır capture profiles.	
-			Create
Name	Source	Description	Create
Import from disk - Single Mode	File	Import files from disk and s	Modify
Import from disk - Batch Mode	File	Import files from disk and p	
ImageNow Printer - Single Mode	Printer	Used by ImageNow Printer	Delete
GA DGSA Upload for Admissions	File		Com
Commitee Approval Printer	Printer	Used by ImageNow Printer	Сору

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.

C	Capture Profiles			×
	Use this dialog box to create and ma	anage your	capture profiles.	
[N		D	Create
	Name	Source	Description	
	Import from disk - Single Mode	File	Import files from disk and si	Modify
	Import from disk - Batch Mode	File	Import files from disk and p	
	ImageNow Printer - Single Mode	Printer	Used by ImageNow Printer	Delete
	Copy of ImageNow Printer - Sing	Printer	Used by ImageNow Printer	Carry
	GA DGSA Upload for Admissions	File		Сору

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.

GS CONF TRAVE	L PRINTER		\times
General Single	Document Keys		
General —			
Name:	GS CONF TRAVEL PRINTER		
Description:	Used by ImageNow Printer to capture objects in Single Mode (uses currently selected LearnMode Application Plan).	< >	
Туре ———			
Source:	ImageNow Printer	\sim	
	Set as the default Printer profile		
Mode:	Single	\sim	
	Submit documents to Content Server		
Workflow —			
Send To:	GS CONF TRAV ART	\sim	

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 $\qquad \times$				
General Single Document Keys				
Туре:	~			
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.

CONF TRAVEL PRINTER		
eneral Single D	ocument Keys	
Set the document l	ocation and keys.	
Save document	to a folder.	
Decument Key	Tune	Value
Document Key	Туре	
Drawer	Application	Application Plan
Name	Empty	
Field1	Application	Application Plan
Field2	Application	Application Plan
Field3	Application	Application Plan
Field4	Application	Application Plan
Field5	Application	Application Plan
Doc Type	Document Type	Financial Support

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.

Key Defini	tion: Doc Type	×
Type:	Document Type	~
Value:	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.

ImageNow Print	×
Capture Profile Capture Profile:	GS CONF TRAVEL PRINTER ~
	OK Cancel

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