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.

1. Open the student’s record in PeopleSoft (DukeHub/SISS/STORM) using Internet Explorer only. Navigate to the Student Program/Plan page, select the Student Plan tab, and click on the ImageNow Linking button (similar to the conference travel form upload process).

2. Open the PDF of the reappointment letter and print it, selecting the ImageNow Printer option.

3. 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.

4. 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.
5. 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.

6. 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)

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.

![Capture Profiles dialog box]

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.

![Capture Profiles dialog box with copy created]

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.
6. In the Single tab, set the Application Plan to GS SRF Form – IE 11.

( Exception: If you use an earlier version of Internet Explorer, you will need to set the Application Plan to GS SRF Form instead. To check which version of IE you have, click on the gear icon in the top right of your browser window and select “About Internet Explorer.”)

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.