

Perceptive Content EP4 ***v.7.7.0*** ***Quick Reference Guide***


This Guide is designed to introduce and help you become familiar with Perceptive Content's basic functions

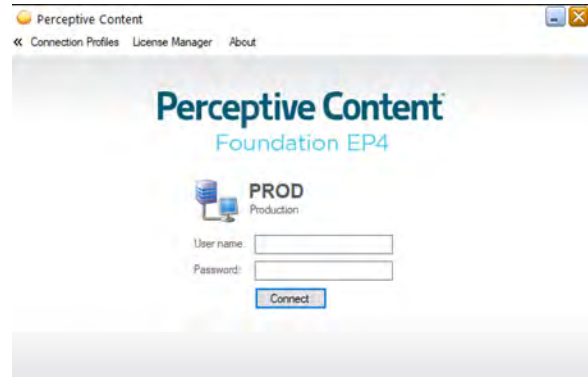
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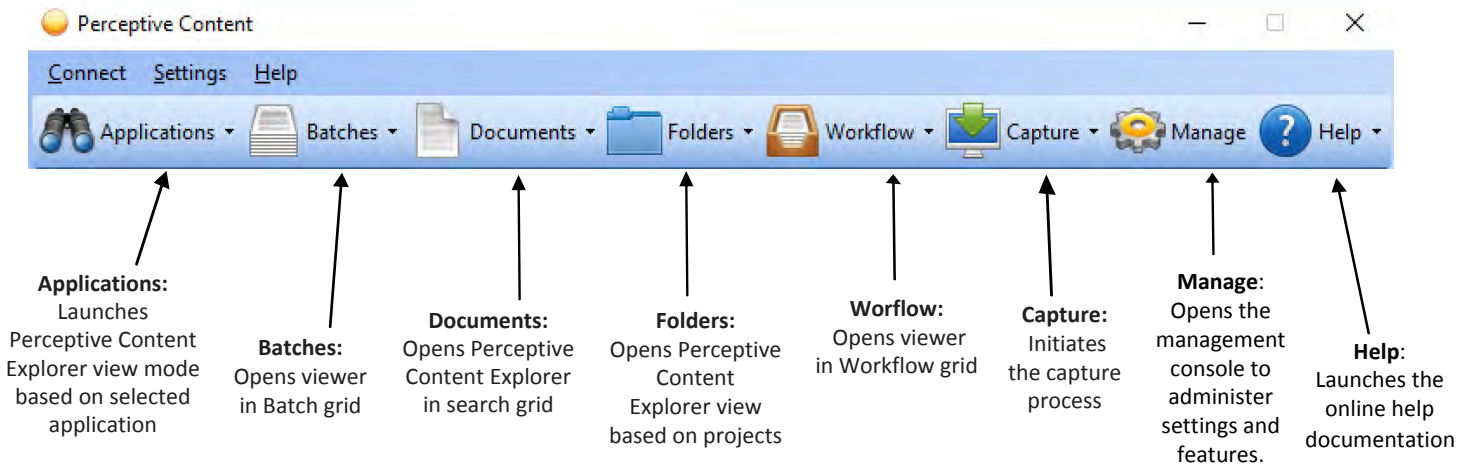
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Log into Perceptive Content

- Click on  located in the System Tray or located on the desktop
- Enter User Name and Password
 - ** Use your Duke NetID and NetID password **
- Click



Perceptive Content Toolbar



Applications Displays documents captured using a specific application plan. This allows you to access documents that are linked to records in DukeHub.

Batches Displays the batch grid allowing you to quality assure and link batches of captured files to create ImageNow documents. This allows you to access documents that are ready for QA or Linking. By default, batch users can see all batches, batches that are ready for QA, and batches that are ready for linking.

Documents Tool to search for documents in Perceptive Content. This allows you to access documents within specific document view and filter.

Folders Tool to search for Folders in Perceptive Content. This allows you to access documents within specific Folder view and filter.

Workflow Display Workflow process and queues that contain folders\documents. Access and process workflow items in workflow.

Capture Set up and manage scanners and capture profiles through this button. Clicking this button will launch the most recently run capture profile. The Capture tool allows you to access capture profiles.

Manage Open the Management Console. Used by administrators to manage security and privileges across ImageNow.

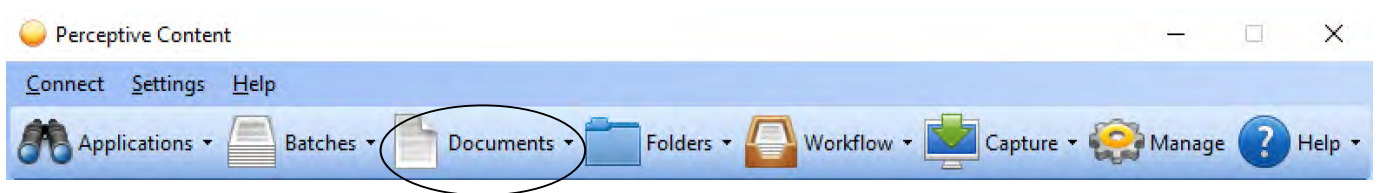
Help Launches the online Perceptive Content help documentation. The Help tool provides you with access to information regarding the Perceptive Content.

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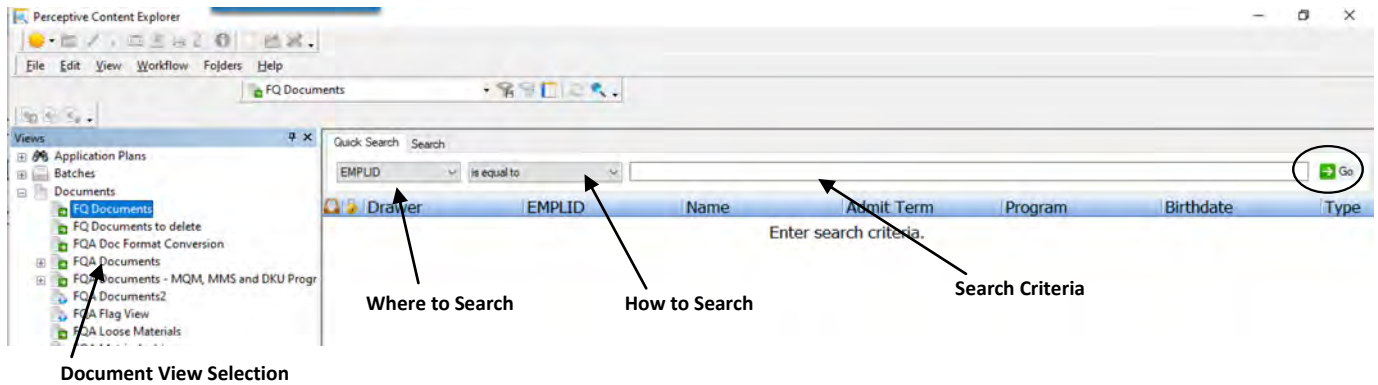
Search for Documents


- On Perceptive Content toolbar, select Documents

Perceptive Content Toolbar



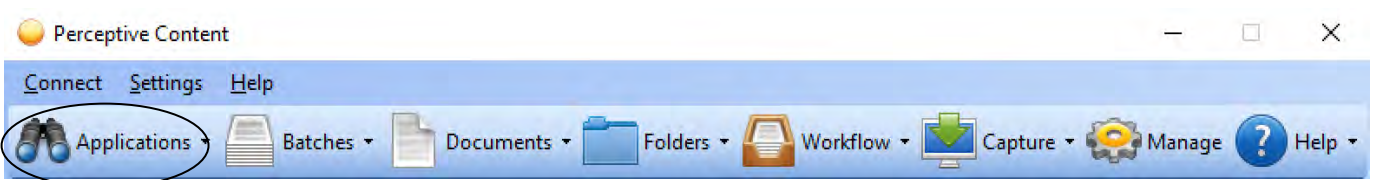
- Select the document view from left side of menu



- From Quick Search
 - Where to search using the Document Keys, select from drop down list ex. EMPLID or Name
 - Select How to search, change to 'is equal to' or leave 'starts with'
 - Enter search criteria in the field
 - If searching using name, enter last name then ', ' and part of first name (last name comma first name)
 - Click  Go

Search from DukeHub

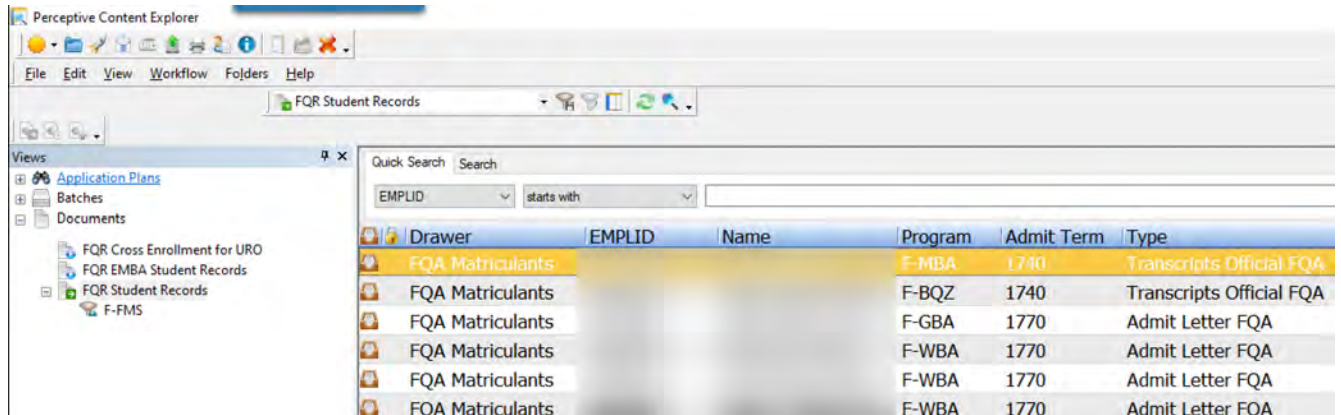
- Find person in DukeHub using the Student Program Page
- On Perceptive Content toolbar, select Applications
- Search results will display the Documents associated to the person in Percpetive Content



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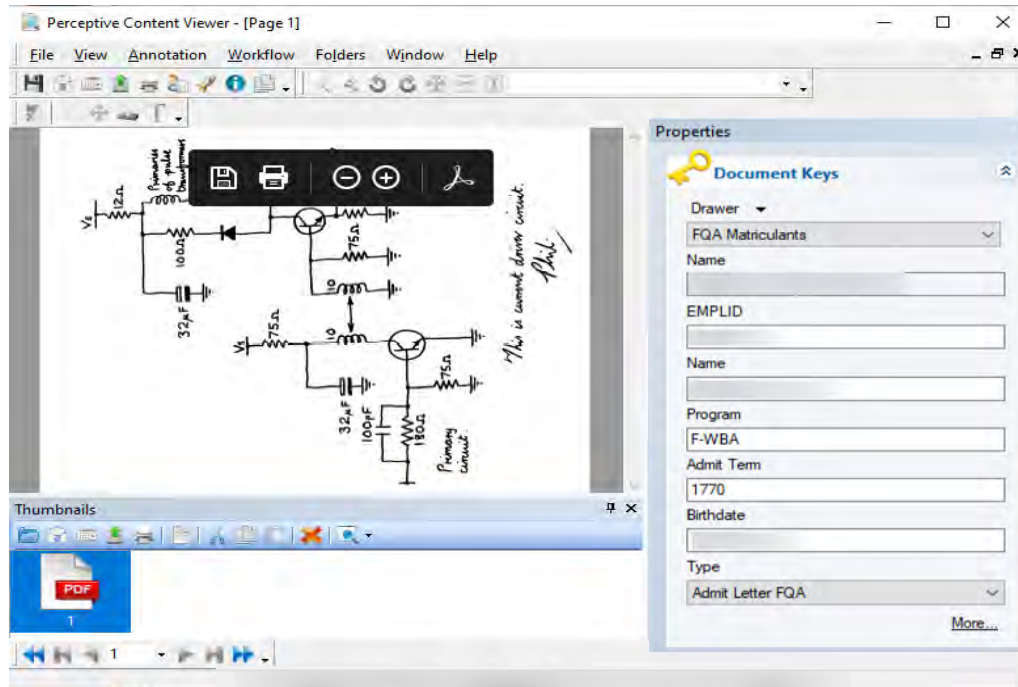
Open Documents

- From the search results, double click on document type to view



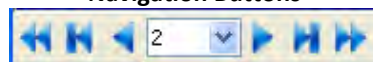
View Documents

Note: Screen size and resolution can affect how the document is viewed.



- Use the navigation buttons at the bottom of the screen to move from one page to the next.

Navigation Buttons



Moves to the previous/next document type on Search Results



Moves to the first/last page for selected document type



Moves one page forward/backward for the selected document type

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Close Perceptive Content Viewer

- Click **X** in the upper right-hand corner to close document view and return to search screen



- Select new document type to view OR Enter new search criteria to view document types for another person

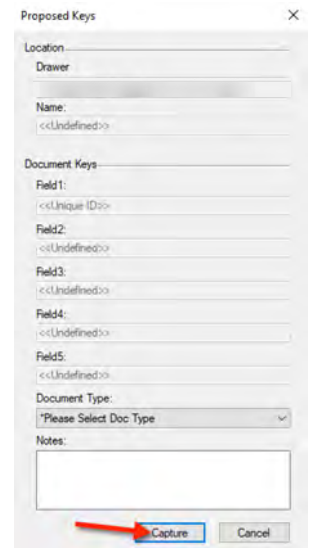
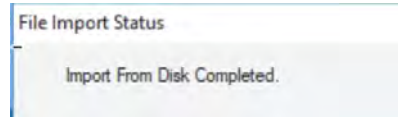
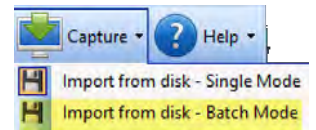
Capture Documents

Documents can be captured in both batch and single file from disk.

- Batch File from a disk
- Single File from a disk

Follow these steps to capture a batch of documents

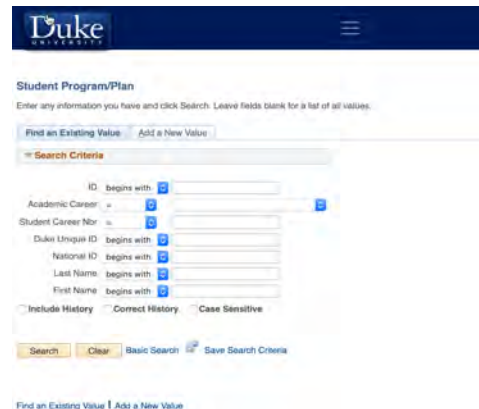
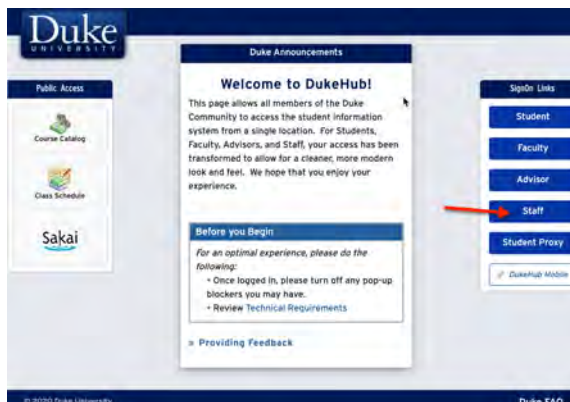
- Click on the down arrow next to the Capture icon on the Perceptive Content toolbar.
- Click on the Batch File Capture profile (highlighted).
- The Proposed Keys window will appear. Click the Capture button.
- Locate and select the document files you would like to import and choose Open
- Once the file import is complete, the File Import Status dialog box will display.



Follow these steps to capture a single document:

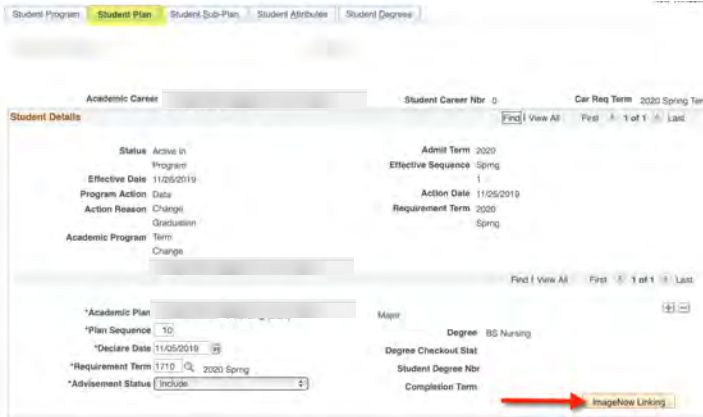
- Launch **Google Chrome** and login to DukeHub Staff Login
- Navigate to the Student Program/Plan page DukeHub and search for the desired student's record

Campus Solutions Content > Records and Enrollment > Career and Program Information > Student Program/Plan

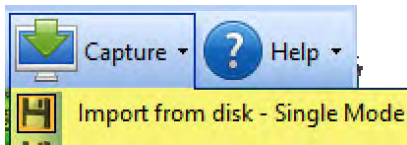


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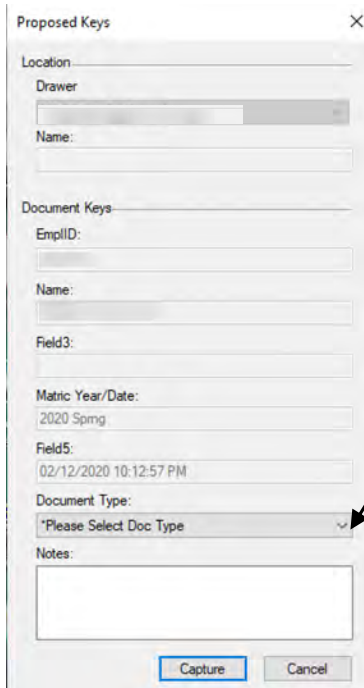
3. Navigate to the Student Program/Plan page -> Plan tab
4. Click the ImageNow Linking button



5. In Perceptive Content, click on the down arrow next to the Capture icon on the Perceptive Content toolbar.

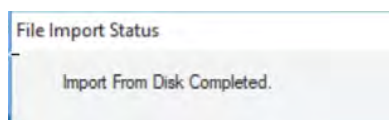


6. The Proposed Keys window will appear. Data from DukeHub for the student's record will be displayed in the Documents Keys section in the window such as EMPLID, Name, etc.



- a) Select the type of the document you are capturing by clicking on the down arrow under Document Type.
- b) Choose one of the document types from list.
 - General Correspondence FQR
 - Honor Code FQR
 - HSM Certificates/Concentrations FQR
 - Leave-Absence/Suspension/Withdrawal FQR
 - Sponsorship Letter FQA
 - Student Conduct FQR
 - Transcripts Official FQA
- c) Click the Capture button.

7. Locate and select the document files you would like to import and choose Open
8. Once the file import is complete, the File Import Status dialog box will display.

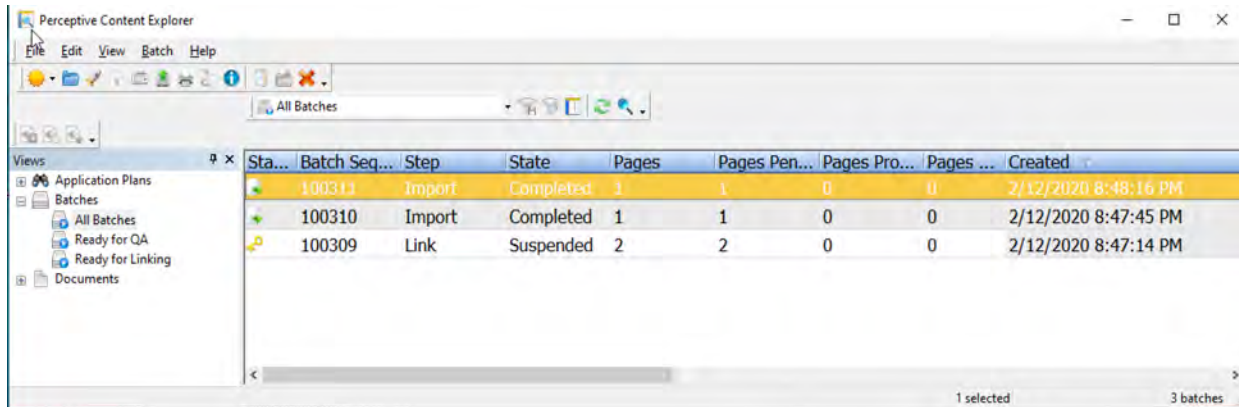


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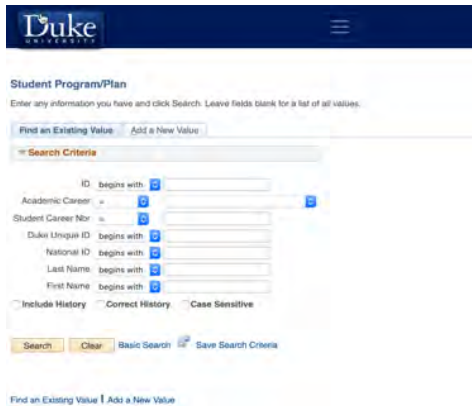
Link Documents

You can only link documents to DukeHub using Google Chrome. Follow these steps to link a document:

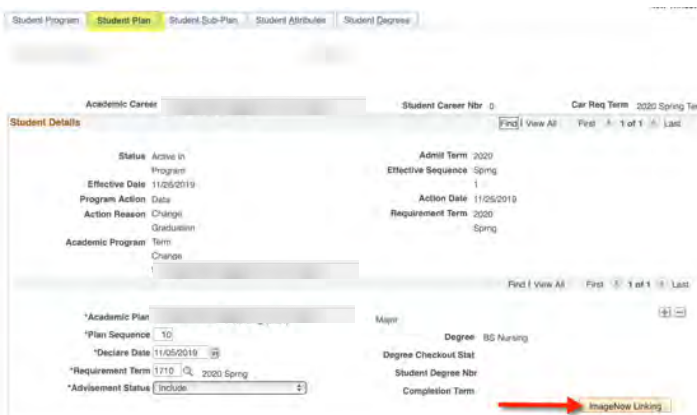
1. Click on the Batches icon on the Perceptive Content ToolBar.
2. The Perceptive Content Explorer window will open.
3. Click on the All Batches option and select the desired batch of documents




4. Double-click to open the batch of documents
5. Launch **Google Chrome** and login to DukeHub Staff Login
6. Navigate to the Student Program/Plan page Duke Hub and search for the desired student's record
Campus Solutions Content > Records and Enrollment > Career and Program Information > Student Program/Plan

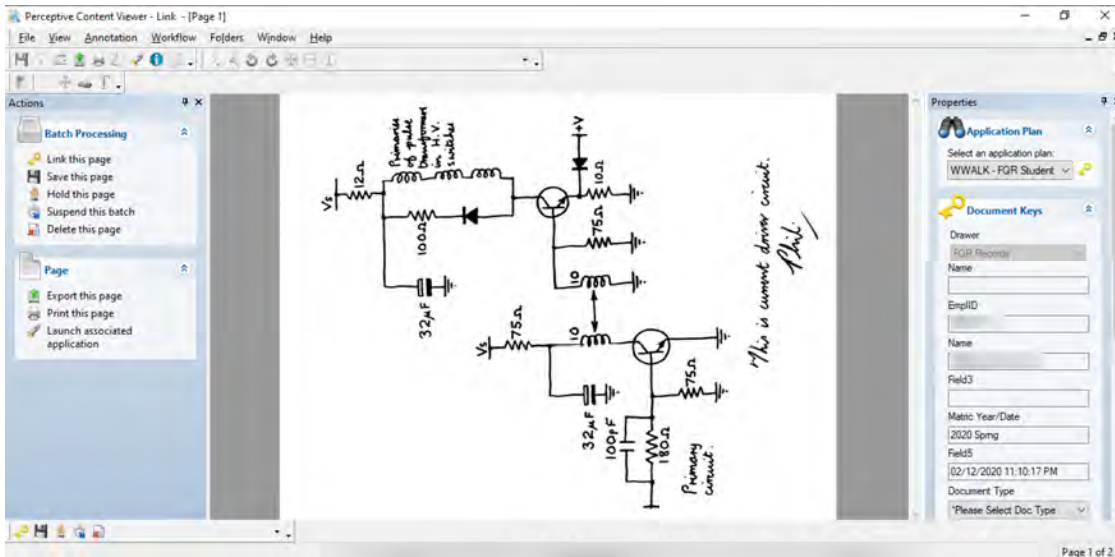


7. Navigate to the Student Program/Plan page -> Plan tab and Click the ImageNow Linking button




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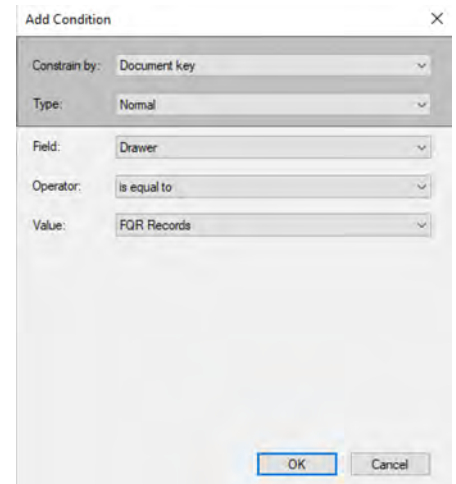
- Go back to the opened document in Perceptive Content Viewer
- Click the Link icon  to create a link between the two systems (Perceptive Content and DukeHub).
- The link is successful if the document keys contain the applicant's information from the DukeHub



- Select the type of the document you are capturing by clicking on the down arrow under Document Type.
- The next document to be linked will appear automatically.
- Repeat the steps starting at# until the entire batch of documents are linked.

Advanced Search for a Document or Folders

- On the Perceptive Content toolbar, select Documents or Folders. 
- In Perceptive Content Explorer, in the Views pane, select the document or folder view to use as a basis for the search.
- In the right pane, click the **Search** tab and then click the **Add** button.
- In the **Add Condition** dialog box, do the following sub-steps:
 - In the Constrain by list, select desired criteria.
 - In the Type list, select the type of search to perform.
 - In the Field list, select the desired field.
 - In the Operator list, select the desired criteria.
 - In the Value list, select the desired criteri.
 - Click OK.
- Click the Go button.

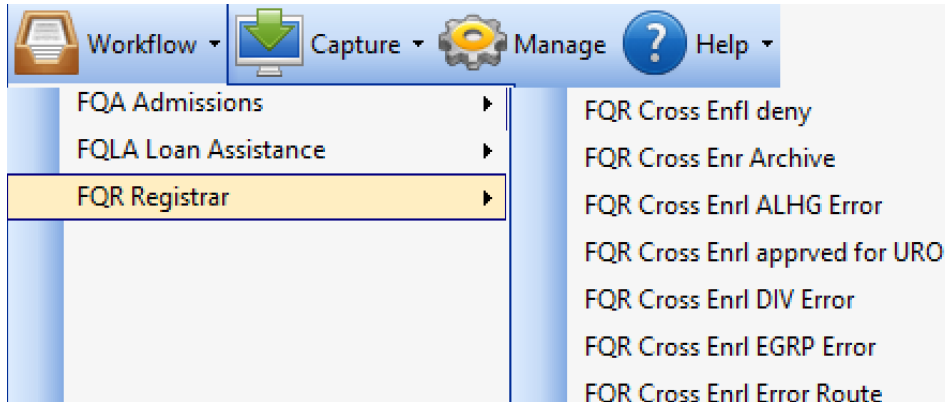


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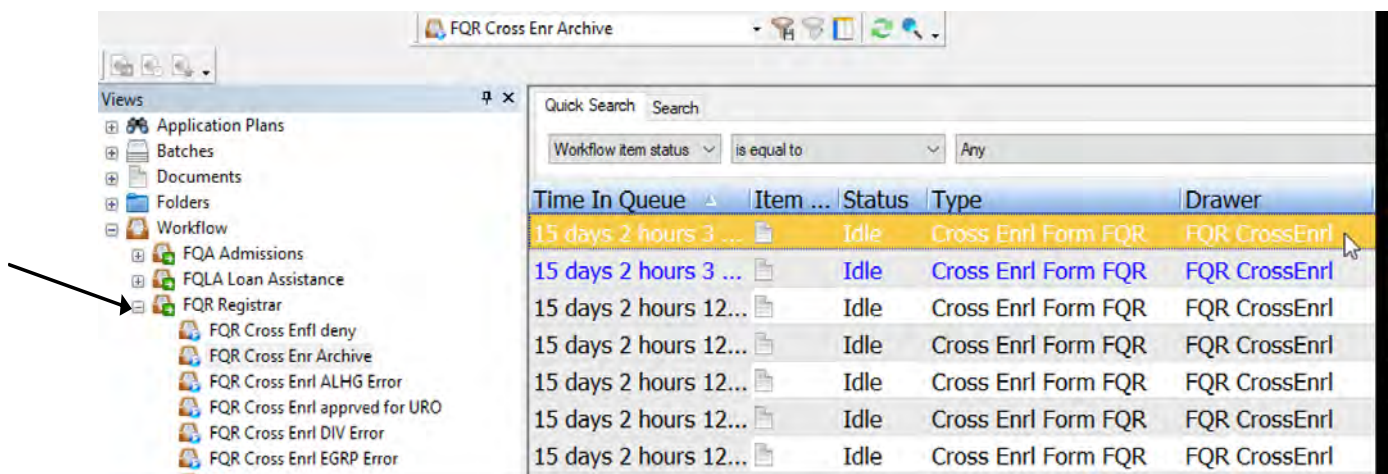
Process items in Workflow

Two quick methods for opening a Workflow queue.

1. From the **Perceptive Content Toolbar**, click the down arrow next to the Workflow button.
2. Select a Workflow queue to open. Perceptive Content Explorer opens and the documents/folders contained in the selected queue are listed in the Workflow grid.
3. Double click on an item to open it for viewing and processing.



1. From the Perceptive Content Explorer Views pane, click the "+" next to **Workflow** to view the expanded list of workflows.
2. Click the "+" next to a workflow to view the expanded list of queues in that workflow.
3. Click on a **Workflow queue** to list the documents contained within that queue.
4. Double click on a item to open it for viewing and processing.



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Route items in Workflow

Follow these steps to route a workflow item:

1. Open an item in Perceptive Content Viewer Workflow mode.
2. Validate the document keys. Make any changes as necessary and click **Save** if any changes were made to the document.
3. Click **Route Forward**.
4. A window appears with the queue choices, if any. Select the appropriate destination queue and then **Route**.
5. Repeat these steps until all items are linked and the queue is empty.

