DOCUMENT IMAGING

UMASS LOWELL

Perceptive Experience

Quick Reference Guide

For

Graduate Program Coordinators

&

Committee Members

Support Contact

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Overview

Welcome to Document Imaging. This job aid provides guidelines on how to review Graduate Applications in the Document Imaging system using the *Perceptive Experience* web application. Unlike its predecessor WebNow, *Perceptive Experience* does not require Java and as such may be accessed via PC, MAC or Mobile Devices such as iPads.

(Please note that WebNow is still available should you encounter any issues viewing documents in Perceptive Experience. Remember, WebNow can only be used with Java and Internet Explorer on a Windows based PC.)

Document Imaging provides Graduate Program Directors (GPDs) with access to documents as they are entered into the system and cleared through the Graduate Admissions process. As documents are received by the Graduate Admissions Office, they will be scanned and stored in a central repository. The applications themselves are stored in one of two queues (directories) that correspond to each of the Plan/SubPlans to which the student has applied.

> ***UMLGA Applied & Processing Directories***: Directories appended with "UMLGA Applied & Processing" are used to store incomplete applications packets until all of the required documents are received.   Incomplete applications are accessible in this queue for the purposes of allowing GPDs to pursue the applicant based on the documentation on hand. In such cases, GPDs must contact the Graduate Admissions office and request that the incomplete application packet be moved to the "Ready for Review" queue for immediate processing. In the typical sequence of events, applications will be moved out of the "Applied & Processing" queue and into the "Ready for Review" queue once all necessary documents are received and a Profile Sheet is created.

> ***UMLGA Ready for Review Directories***: Once all of the documents required to complete an Application are received and a Profile Sheet generated, the Application will be moved to the "UMLGA Ready for Review" queue. It is from this queue that GPDs will approve/deny applications and return them to the Graduate Admissions office for final processing.

>> ***Example***: The documents of a student applying to the Masters of Business Administration plan with a concentration in Accounting would be stored in a queue (directory) named "BusAd MBA-Accounting (UMLGA Applied and Processing) until the profile Sheet is created at which time they would be moved to a queue named "BusAd MBA-Accounting (UMLGA Ready for Review).

BusAd MBA-Accounting (UMLGA Applied and Processing)
BusAd MBA-Accounting (UMLGA Ready for Review)

Supported Desktop Browsers:

- Microsoft Internet Explorer 11, Microsoft Edge
- Mozilla Firefox (Microsoft Windows OS)
- Google Chrome (Microsoft Windows OS)
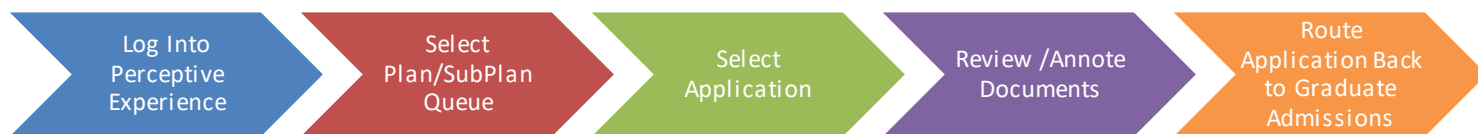- Apple Safari (Mac OS v10.10)

Note: Supported browser versions are listed, however, we recommend that you upgrade to the latest patch of the supported browsers. Note that some browsers release automatic updates and some browsers no longer support version numbers.

Supported Mobile Browsers:

- Google Chrome (Android 5.0 and higher)
- Apple Safari (iOS 9.0 and higher)

Graduate Program Director (GPD) Process Summary

The process by which GPDs will review and accept/deny/etc. graduate student applications consists of the following steps. The steps below are detailed more thoroughly in their corresponding sections.

| Log Into Perceptive Experience | Select Plan/SubPlan Queue | Select Application | Review /Annote Documents | Route Application Back to Graduate Admissions |

Ctrl+Click the heading to navigate to each section for greater detail and instruction.

Log into Perceptive Experience: Log into Perceptive Experience by navigating to the UML Document Imaging homepage (https://www.uml.edu/IT/Services/Administrative-Applications/DI.aspx) , clicking on the ***Perceptive Experience*** Login and using your UML Credentials.

Select Plan / Sub-plan: Click on the "Workflow" icon to display your list of program queues. Highlight Plan (e.g. "Business Administration (MBA) / Accounting") in the left hand column of the screen and then click the Search Button in the upper right of the screen to display the list of applicants for that particular program.

Select Application: Select an application by double-clicking on the Application. The Application will open in the WebNow Viewer.

Review / Annotate Document:

Reviewing Documents: As part of each application, there are several "**Related Documents**". Display the list of Related Documents by clicking the "***Show or Hide Related Documents***" icon in the upper right-hand toolbar and selecting "Grad Admissions Docs UML" as the relationship type. Open any related documents by double-clicking the document. The document will appear in a new Viewer window. (Note: Depending on your browser settings, you may need to allow pop-ups)

Annotating Documents: Perceptive Content provides several annotation tools. To annotate a document, click on the "Annotate Page" icon in the top left-hand toolbar and select "Create Annotation". Click on the page where you would like the annotation to appear and then select the type of annotation you want to add. Make the annotation using the windows that will appear.

Note: To apply a decision, use the appropriate Text Stamp for Admit/Deny/Waitlist, etc.

Route Application back to Graduate Admissions: Once you (GPD) have applied the proper Text Stamp indicating Accept or Deny, etc., to the Application, route the Application back to Graduate Admissions by clicking the "Route Forward" button in the top left-hand toolbar. You will be presented with routing options that match your admission decision. Select the proper route and click OK.

1. **Logging in to Perceptive Experience**

The Login for *Perceptive Experience* is located on the University's Information Technology web page: *https://www.uml.edu/IT/Services/Administrative-Applications/DI.aspx*

The following screen will appear
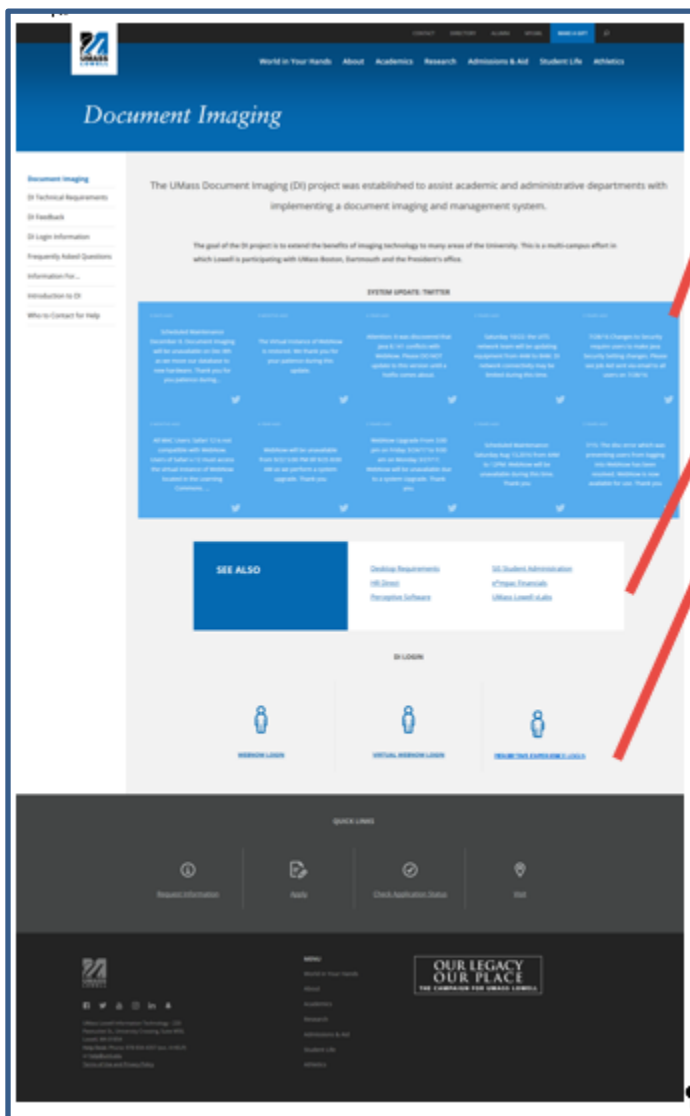
System Tweets:
Look here for information and scheduled maintenance information about Document Imaging

UML Links
Look here for useful links to other UML web pages

Document Imaging Login Options
WebNow: Use this option to access WebNow. Must use Internet Explorer and have Java properly configured

Virtual WebNow: Use this to bypass your local Java settings and access WebNow in the UML Learning Commons. All browsers supported

Perceptive Experience Login:
Use this to access Perceptive Experience. This version does not use Java and supports all

1.1 **Once on the Document Imaging home page, scroll to and click *"Perceptive Experience Login"***

The following screen will appear

1.2 **Enter your User Name, Password and Campus. Click Login**

User Name and Password are your UML credentials.

2. Perceptive Experience Home Page

The Perceptive Experience homepage provides you with two options; "***Documents***" and "***Workflow***".

Documents: Used to view Applications that have been processed by the Coordinator and routed back to Graduate Admissions. They are no longer in the Workflow.

Workflow: Used to locate documents that are awaiting an admission decision. These applications are still in the workflow residing in either the plan's "Applied and Processing" or "Ready for Review" queue.
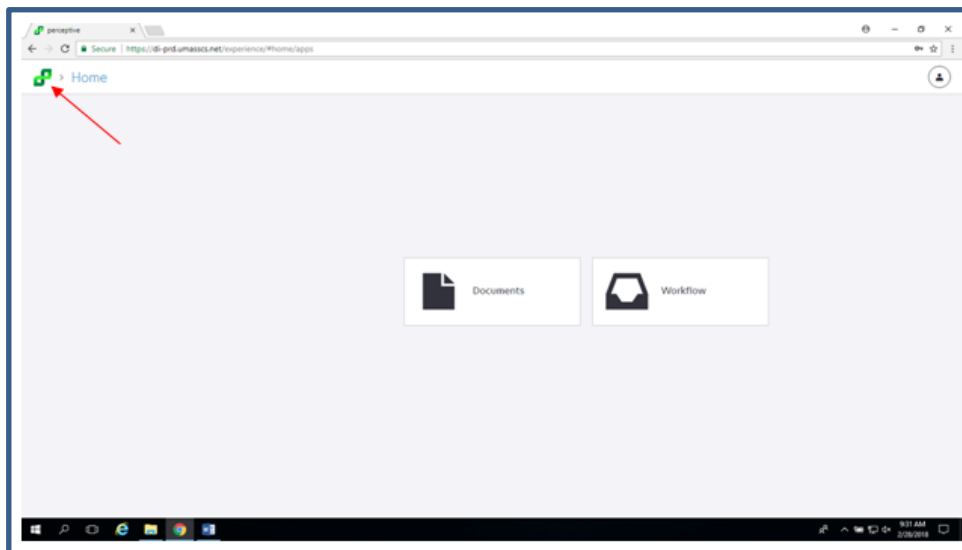
Useful·tip:·clicking·the·green·"Perceptive·Experience"·icon·brings·the·browser·to·the·home/main·menu· page.·¶

3. Logging out of Perceptive Experience

3.1   **Click the User icon in the upper right-hand corner of the**

3.2   **Click the On/Off Power icon in the drop down menu that appears**
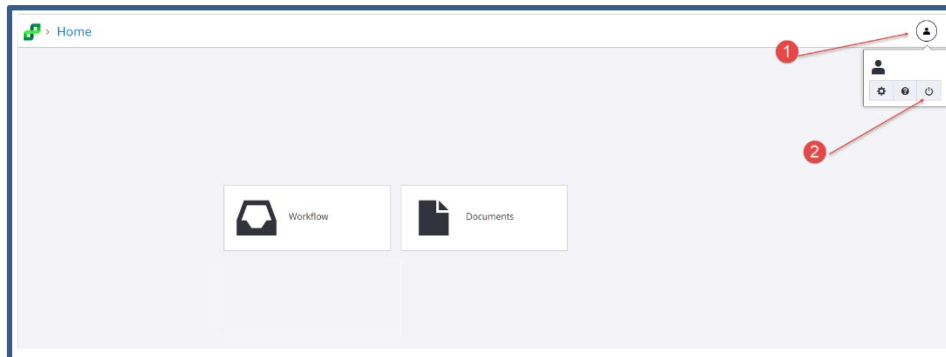
4. Selecting the Workflow Plan/Sub-Plan Directory

To view applications for a particular Plan/Sub-plan, you must first select the Plan/Sub-Plan from the list of available Plans.
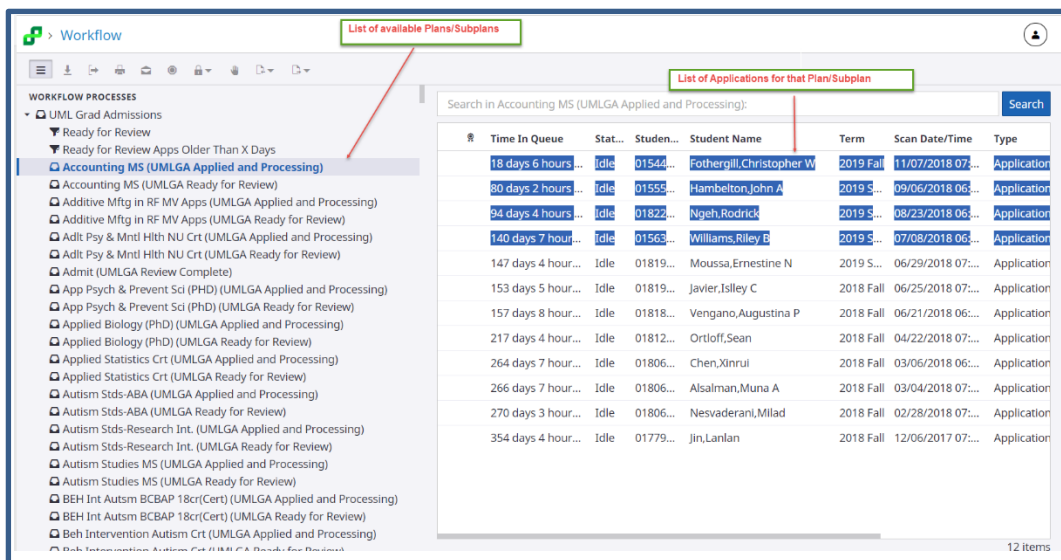
4.1   **Click on the "workflow" icon**
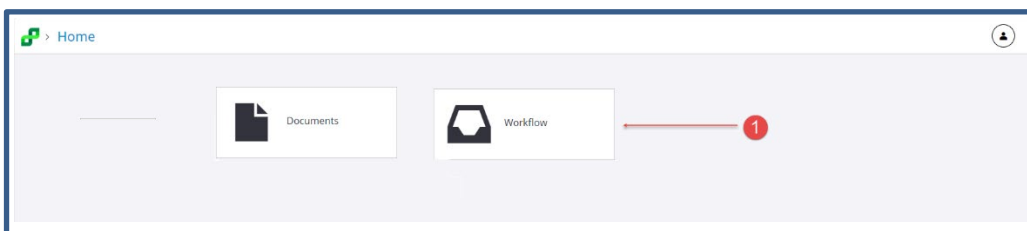
4.2   Select the Plan whose applications you wish to review by highlighting the Plan/Subplan n name listed beneath the Workflow heading and then clicking the blue Search button in the upper right corner of the screen..
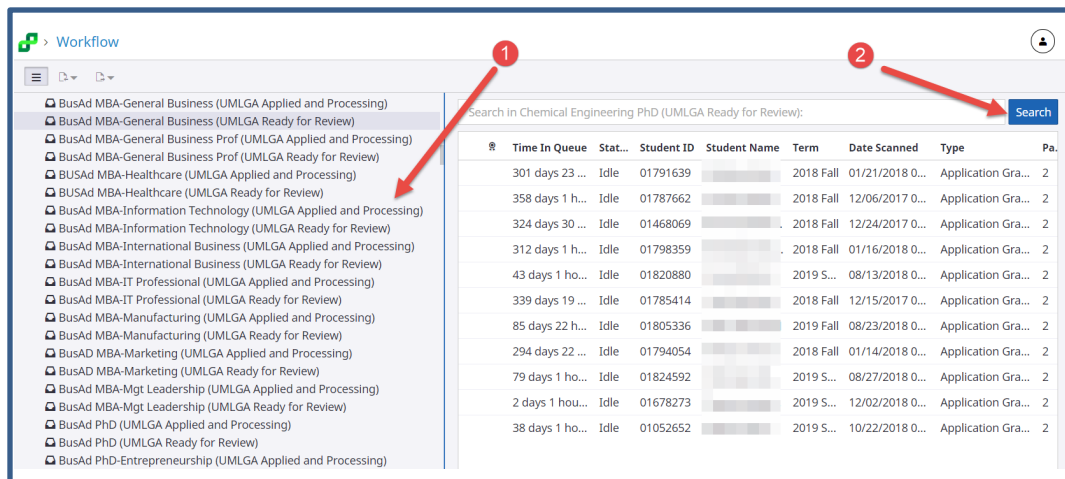
Remember: The applications contained in the "*Applied and Processing*" queues are incomplete applications while those in the "*Ready for Review*" queues are complete.

5. Selecting Applications

Once you select a Plan/Sub-Plan directory, any applications for that Plan/Sub-Plan will appear in the panel on the right side of the screen.
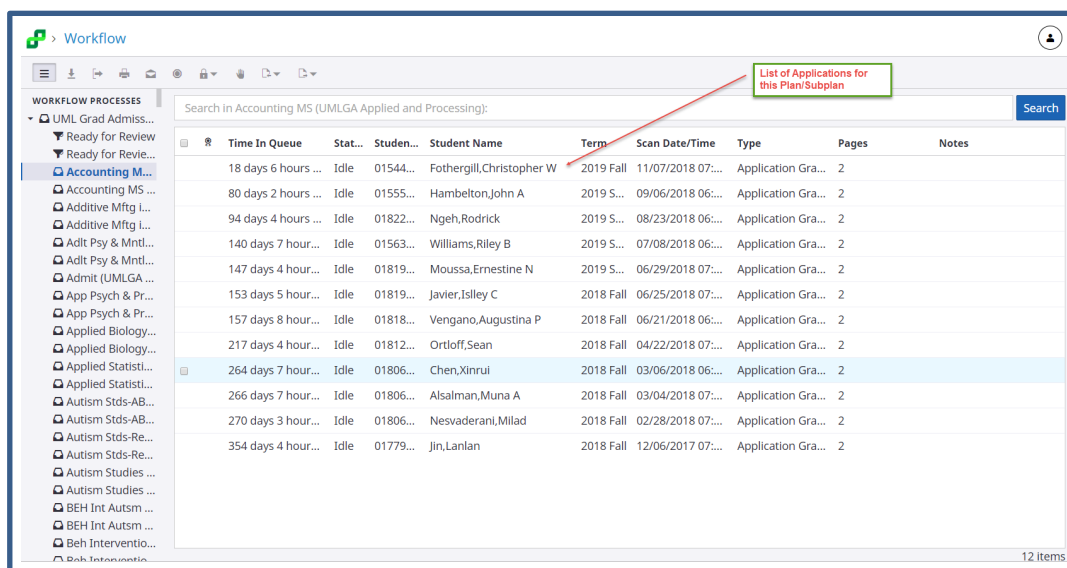
Note: If there are no applicants for a Plan/Sub-Plan, the right panel will remain unpopulated and will display the message *"No Items Found".*

5.1   Double click on the row containing the Application you wish to view.

6. Perceptive Experience Viewer

Once you have selected the Application to be processed and it has displayed in the viewer. The image below and the table that follows describe the various options available withing the Viewer.

Note: Depending on Profile Permissions, not all options may be available.

Note: You may control what is displayed in the Perceptive Experience Viewer window as follows:

1. **Thumb Nail of Pages**: These thumbnail images of the pages within the selected document may be enabled/disabled via the "Show/Hide Thumbnails" icon

2. **Related Documents**: These Application Documents are displayed by clicking the "Show/Hide Related Documents icon.
   a. In addition to showing the Related Documents, you must specify the Relationship
      i. Click the down-arrow on the Relationship bar, which is located beneath the Web Application Summary document. Select the "Grad Admissions Docs UML" from the drop-down menu.
   b. This option must be selected for each Perceptive Experience session

3. **Document Properties**: These indexing values may be displayed or hidden by clicking the "Show/Hide Properties" icon.

Viewer Options

Upper Toolbar		
Function Name	Function Icon	Description
Return	←	Closes the currently opened Application document and returns to the list of Applications for the chosen Plan
Save	💾	Saves the document including any annotations made
Create Task	📋	
Annotate Document	✎▾	Enables the Annotation functionality. • Click Create Annotation • Point to area on document where annotation is to be displayed • Select annotation type from menu Also hides annotations
Add Page	✚▾	Adds a blank page to the document either BEFORE, AFTER or In Place Of the current page
Delete Page	🗑	Deletes the current page
Download Document	⬇	Saves the document to the local hard-drive
Export to PDF	➡	Saves a PDF version of the document to the local hard-drive
Print Document	🖨	Prints the current document with or without annotations
Send Email	✉	Sends the document via email
Apply Retention Hold	◉	
Version Control	🔒▾	Adds version control to the document allowing for different users to add and track annotations
Apply Workflow Hold	✋	
Route Back	▾	Sends the document back to the previous workflow queue
Route Forward	▾	Sends the document to the next queue in the workflow

Bottom Toolbar		
Function Name	Function Icon	Description
Page Navigation	◀ 1 / 2 ▶	Reflects the current page number (boxed) and the total number of pages. Use arrows to navigate between pages
Zoom Level	25% – ○ +	Reflects the current size of the document as a percentage of 100 (full size) Use + and – to adjust size of document
Best Fit		Sets the document size to the largest size, both height and width, that will fit in the display window
Fit With		Sets the document width to the size of the display window
Fit Height		Sets the document height to fit the length of the display window
Original Size		Sets the document to 100%
Rotate 90° (right – Left)		Rotates the document 90 degrees right or left.

7. <u>Reviewing Application's Related Documents</u>

Related Documents are available only once their associated Application is opened in the viewer.

7.1   Click the "Show or Hide Related Documents" icon ⊞ located I the top right-hand toolbar

A window will appear in the lower part of the screen.
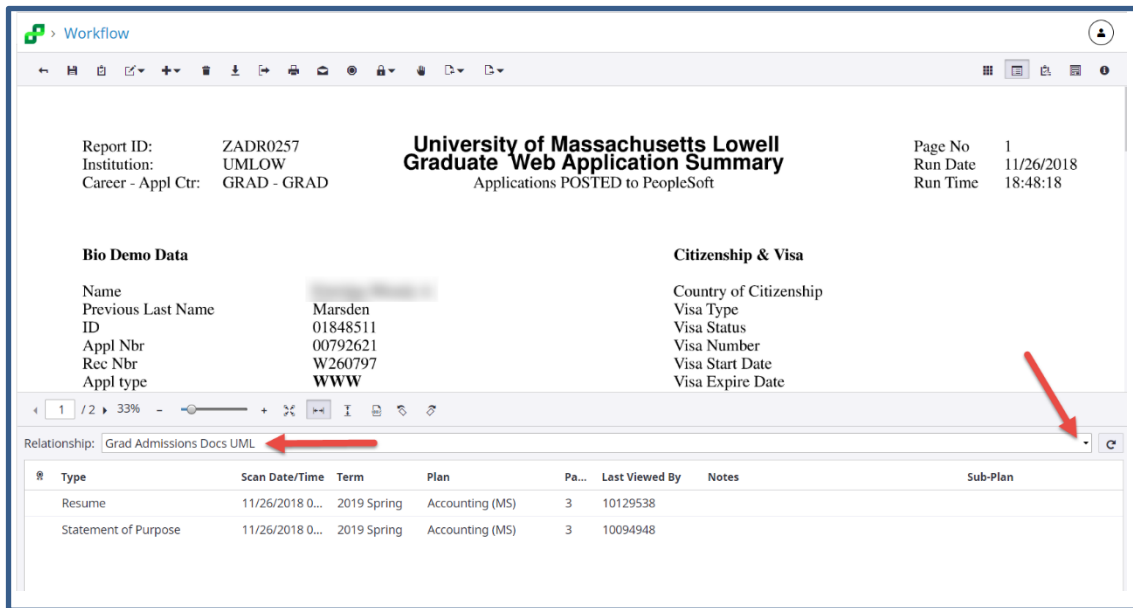
7.2   Click the down-arrow in the Relationship window and Select Grad Admissions Docs UML as the relationship type

Note: Depending on your PC settings, you may need to manually expand the Related Documents window. To do so, use your mouse and hover over the separation between the upper and lower windows until a double arrow ⇕ appears. Once it does, press and hold the left mouse button and drag the separator upward.

7.3   Open the desired document by double clicking on the document

Note: Use the "Fit Width", "Fit Height" or "Zoom Level" tools to adjust the document to suit your reading preference*.*
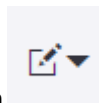
⇕

8. Adding Annotations

Perceptive Experience allows you to add annotations in a variety of forms. All annotations are permantly stored as part of the document to which they are applied.
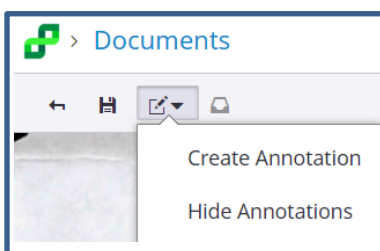
Remember: Once annotations are saved, they are viewable by other persons who may review the documents.

To add annotations to a document...

8.1 **Click the Annotations icon**

8.2 **Select "Create Annotation**

8.3 **Drag Selection Box to location on document where annotation is to be positioned and click to secure**
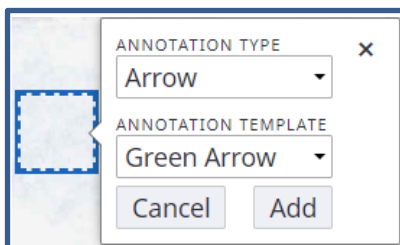
8.4 **Select Annotation Type & Annotation Template**

8.5 **Click Add**

The annotation selected will appear in the location selected.

The table on the next page lists the availabe Annotation types

Note: Depending on Profile Permissions, not all annotation options may be available.

Annotation Type	Description
Arrow	Arrow annotations can be customized in terms of color, line weight and direction
Check	Check annotations can be customized in terms of color
Highlight	Highlight annotations can be customized in terms of color and field size
Line	Line annotations can be customized in terms of length, color and line weight
Oval	Oval annotations can be customized in terms of size, color and line weight
Pen	Pen annotations can be customized in terms of color and line weight. Pen annotations are made using the mouse as the pen.
Rectangle	Rectangle annotations can be customized in terms of size, color and line weight
Sticky Note	Sticky Note annotations allow users to attach notes to the documents. Please be certain to include your initials on each note as a means of recording who created the note.
Text	Text annotations allow you to add test into the body of the document. Text annotations may be customized in terms of Font, Size, Style, Italics, alignment, and color
Text Stamp	Text Stamp annotations are the means by which Committee Members make recommendations to the Program Coordinator and by Which Coordinators make final admission decisions. The following Stamps are available: **Committee Member Stamps:** • Not Recommended • Recommended • Recommended with Permissions **GPD Stamps** • Admit • Admit with Conditions • Deny • Waitlist
URL	URL annotations allow you to add a URL link to the document

Committee Members helping to review Student Applications should use the Committee Member Stamps to make their recommendations to the Coordinator.

Program Coordinators indicating admission decisions to an Application will do so by applying an Annotation Text Stamp that reflects one of four decision options; "**Admit**", "**Deny**", "**Admit with Conditions**" or **"Waitlist"**. Only faculty members with the Coordinator (a.k.a GPD) role have access to these stamps These stamps should be placed on the first page of the **Application Document**

Note: When making the decision to "Admit with Conditions", GPDs must also apply a Sticky Note annotation listing the conditions that are to be stipulated in the letter to the applicant

9. Routing Completed Applications back to Graduate Admissions

Once a Decision Stamp has been applied to the Application document, the Application must be routed back to the Graduate Admissions office for final processing. To route an Application back to Graduate Admissions….

9.1   Click the Route Forward Icon located on the Upper Left-hand tool bar

9.2   Select the Option that matches your admission decision

Upon forwarding the application back to the Graduate Admissions office, the application will be replaced with the next application waiting to be reviewed and the Related Documents pane will refresh to display those document related to the new application displayed.

Note: If the Application does not have a Decision Stapm annotation or if the Decision Stamp and the Destination Route selected, the system will return the Application to the "Ready for Review" queue.

Note: Applications with an "Admit with Conditions" stamp should be routed to the Admit (UMLGA Review Complete) queue

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10.Viewing Documents No Longer in the Workflow

Once Applications have been fully processed by the program Coordinator (AKA : GPD), and routed back to, and processed by Graduate Admissions, the documents exit the Workflow and are sent to a central Document Rapository. In order to view documents residing in the Repository, you must use the Document option found on the WebNow homepage.
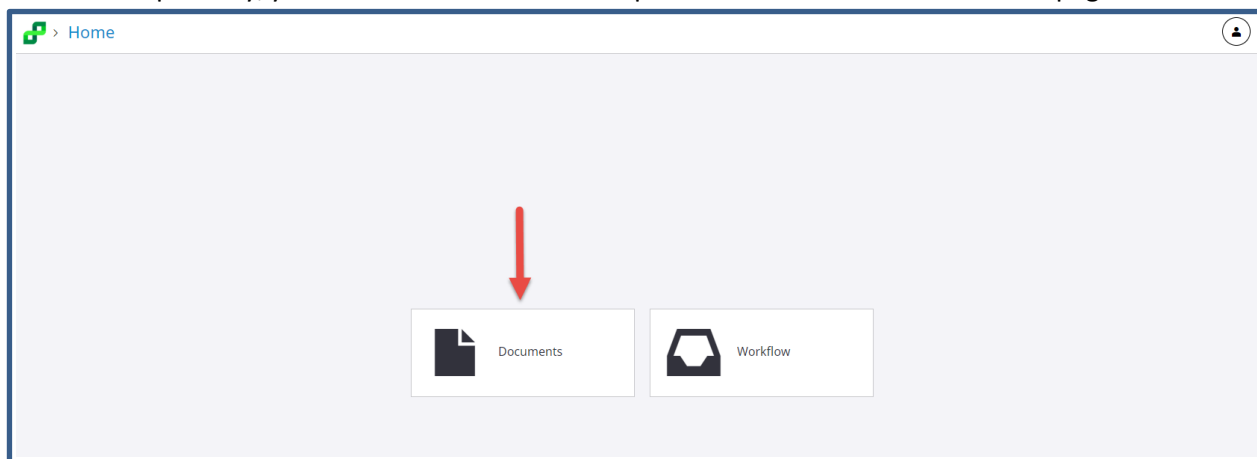
10.1   Searching for Applications Already Processed

To search for an application where the Plan/Sub-Plan is known...

1. **Highlight the Plan/Subplan and click the blue Search button in the upper right of your screen.**

    The system will return up to 500 student applications belonging to that Plan/Sub-Plan

2. **To narrow the search, use the Search functionality by clicking into the Search Bar.**

    Several Search Contraint windows will appear.
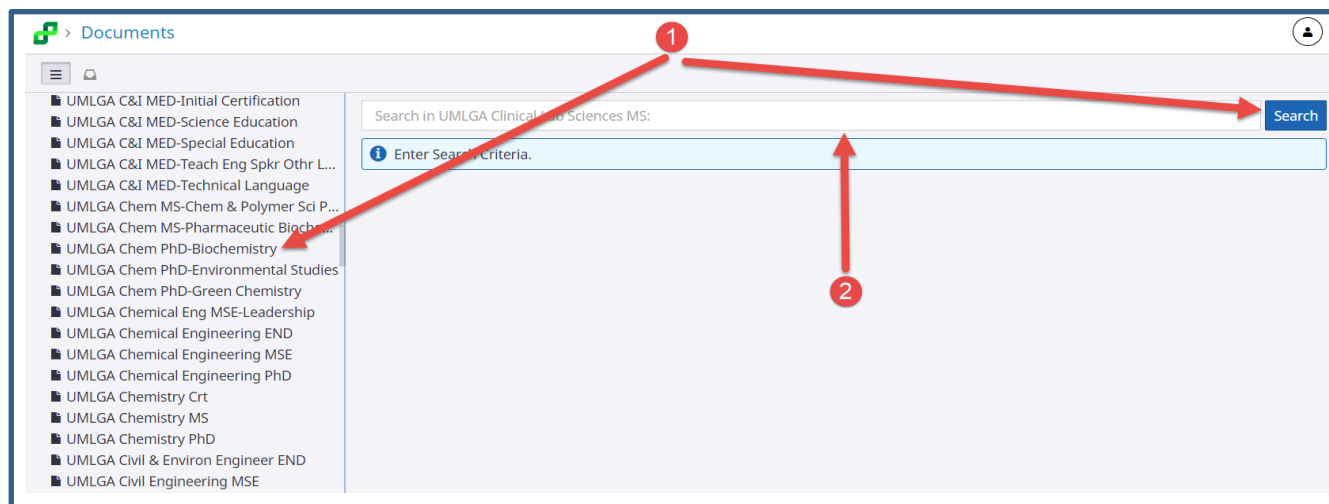
10.1.1 Search Constraints

When you click on the Search window, the window will display Constraint, Operator and Value windows.

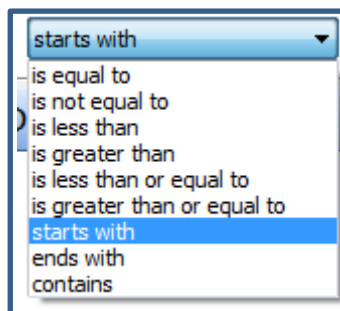| Search in UMLGA Adlt Psy & Mntl Hlth NU Crt: | | | Search |
| Add Constraint: Name ▼ | starts with ▼ | | Add Cancel |

There are several options when searching for a particular Student Application and related Documents.

The table Below relects the various Search Attributes

Search Criteria (Fields)

Search Criteria Options	Description
Drawer	Default: This virtual file drawer is where all Graduate Application documents are stored.
Student ID	This is the peiopleSoft student ID assigned when the studen applied.
Student Name	The convention for this name is Last,First
Term	Allows you to serach for applications by semester.
Plan	Allows you to search for application documents by program attended.
Date Scanned	Graduate Admissions use only.
Type	Allows you to seach for documents by type (e.g. Letter of Reference, Transcript, etc.)
Any Document Key	System will search across all fields for the entered Value

Operators: These options are self explanitory and link the Criteria and the Value

starts with ▼
- is equal to
- is not equal to
- is less than
- is greater than
- is less than or equal to
- is greater than or equal to
- starts with
- ends with
- contains

Value: It is here you would enter the specific item on which you want to serach.

(e.g. Student ID, Nme, etc.)