WORKFLOW

SYSTEM OVERVIEW

DETAILS

MOBILE DEVICE
Document Types:
- UND-CIO-MDTA-Mobile Device

TECHNOLOGY ALLOWANCE
Document Types:
- UND-CIO-MDTA-Technology Allowance

DOCUMENT CLASSIFICATION

<table>
<thead>
<tr>
<th>Drawer Name</th>
<th>Document Type Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UND-CIO-Mobile Device and Tech Allowance</td>
<td>UND-CIO-MDTA-Mobile Device</td>
<td>University-Owned Mobile Device &amp; Technology Allowance form (where Mobile Device is selected)</td>
</tr>
<tr>
<td>UND-CIO-Mobile Device and Tech Allowance</td>
<td>UND-CIO-MDTA-Technology Allowance</td>
<td>University-Owned Mobile Device &amp; Technology Allowance form (where Technology Allowance is selected)</td>
</tr>
<tr>
<td>UND-HRP-Human Resources</td>
<td>UND-HRP-HR-Compensation-Staff</td>
<td>Additional Pay Forms</td>
</tr>
</tbody>
</table>
FORM

EMPLOYEE

FORM COMPLETION

1. Click on the link to the Mobile Device and Technology Device Request form
2. Enter login credentials
3. Click Submit

4. Complete the form
   a. **Section 1-Requester Information**
      i. The requester information will auto-populate
      ii. Enter Title
      iii. Select Department from drop-down
      iv. Select the appropriate Fiscal Year relating to your request (current or future)
   b. **Section 2-Business Purpose/Justification**
      i. Select the business purpose for the request (check all that apply)
   c. **Section 3-Request**
      i. Select No or Yes if this request is a renewal request from the previous year
      ii. Select type of request
         a. Mobile Device
         b. Technology Allowance
            i. Attach completed Additional/Reduce Pay form (MUST be in PDF format) – Form can be found on the Forms page of Human Resources and Payroll Services site.
   d. **Section 4-Employee Terms and Conditions Review**
      i. Review the UND Cell Phones and Other Mobile Devices Policy
      ii. Check the box to indicate you’ve read and agree to comply
      iii. Enter your supervisor’s email address
      iv. Click the Sign button to sign the form (you will be asked to enter your login credentials; your signature will populate)
      v. Click the Send to Supervisor button to send the form to your supervisor for approval (you will be asked to enter your login credentials)

EMAIL CORRESPONDENCE

1. The employee will be emailed a submission confirmation noting the request has been submitted to your supervisor for review.
2. Once the supervisor makes a decision, you will be sent an email noting your supervisor’s decision.
3. If approved by your supervisor, your request will be sent to the CIO for final approval; you will be sent an email noting the CIO’s decision.
SUPERVISOR

REVIEW REQUEST

1. When an employee submits a University-Owned Mobile Device or Technology Allowance Request:
   a. The supervisor will be emailed notice of the request and a link to the form for review
      i. Click on the link within the email to access the form

2. Enter login credentials
3. Click Submit

4. Section 5-Review

   a. Click the arrow on the Supervisor Decision dropdown list
      i. An additional dropdown selection box will appear
      ii. Click on dropdown arrow and select decision (APPROVED or DENIED)
      iii. Click OK to close the box

      a. If Denied, please enter Reason
         DENIED

   b. Click the Sign button within the supervisor row

   c. Enter login credentials
      i. Supervisor Signature and Date will automatically populate

   d. Click the Submit button within the supervisor row

EMAIL CORRESPONDENCE

1. You and the employee who made the request will be emailed a submission confirmation noting the supervisor decision. If you, the supervisor, ‘Approve’ the request, the CIO will receive an email to review the request. If request is denied, email correspondence will be sent to the requester; the CIO will not receive any notification.
2. Once the CIO makes a decision, you and the employee will be sent an email noting the decision.
CIO

REVIEW REQUEST

1. When a supervisor approves a University-Owned Mobile Device or Technology Allowance Request:
   a. The CIO will be emailed notice of the request and approval and a link to the form for review
      i. Click on the link within the email to access the form

2. Enter login credentials
3. Click Submit

3.

4. Section 5-Review

a. Click the arrow on the CIO Decision dropdown list
   i. An additional dropdown selection box will appear
   ii. Click on dropdown arrow and select decision (APPROVED or DENIED)
   iii. Click OK to close the box

a. If Denied, please enter Reason DENIED

b. Click the Sign/Submit button within the CIO row

c. Enter login credentials
   i. CIO Signature and Date will automatically populate

NOTE: The completed form will remain on the screen after clicking ‘Submit’; you may close the window.

EMAIL CORRESPONDENCE

1. You, the employee who made the request, and the employee’s supervisor will be emailed a submission confirmation noting the CIO decision.
2. CIO approved forms will move on to Perceptive Content for processing by either UND Human Resources or UND Telecommunications depending on the type of request made and approved.
LOG INTO PERCEPTIVE CONTENT

Go to Start/Perceptive Content or activate by double-clicking the Perceptive Content short-cut icon from your desktop

Once you have successfully logged into Perceptive Content, the Perceptive Content toolbar will appear. Depending upon your individual security, you may or may not see all of the options shown below.
PROCESS A DOCUMENT IN WORKFLOW

TELECOMMUNICATION

1. On the Perceptive Content toolbar, click the arrow next to the Workflow Icon
   a. Select UND-CIO-Chief Information Officer
   b. Select the UND-CIO-MDTA-TeleCom Process workflow queue

2. The selected queue will open in Perceptive Content Explorer, displaying a grid of documents; double-click on a document row to open it

3. Verify the document is indexed with the appropriate Document Keys and Custom Properties
4. Enter the following Custom Properties:
   a. NDUS-Device Number
   b. NDUS-Inventory Number
5. Process document as needed
6. Route the document forward using this icon when processing is complete. The document will be filed away in the drawer and can be located using a search view,
**Human Resources**

1. On the Perceptive Content toolbar, click the arrow next to the Workflow Icon
   a. Select **UND-CIO-Chief Information Officer**
   b. Select the **UND-CIO-MDTA-HRP Process** workflow queue

![Workflow Icon](image1)

2. The selected queue will open in **Perceptive Content Explorer**, displaying a grid of documents; double-click on a document row to open it.

![Perceptive Content Explorer](image2)

3. Verify the document is indexed with the appropriate **Document Keys** and **Custom Properties**

4. Review the attached **Add/Pay form**

5. Process document as needed

6. Route the document forward using this icon when processing is complete. The document will be filed away in the drawer and can be located using a search view.

![Routing Icon](image3)
APPEND A DOCUMENT TO AN EXISTING DOCUMENT

SETUP

NOTE: Setup of capture profiles must be completed by a Perceptive Content Power User.

1. On the Perceptive Content toolbar, click the down-arrow next to the Capture icon
2. Click Manage Capture Profiles...
3. On the Capture Profiles window, click Create
4. The New Capture Profile window will open
   a. On the General tab:
      i. Name the Capture Profile and add a brief Description
         1. Name: Doc Append Printer
            Description: Used to append new documents to an existing document.
         2. Name: WF Doc Append Printer
            Description: Used to append new documents to an existing workflow document.
      ii. In the Source list, select ImageNow Printer
      iii. In the Mode list, select Single
      iv. In the Send To list, select (None)
5. On the **Single** tab:
   a. Doc Append Printer
      i. Set **Application Plan** to: *IN Document Append*
      ii. WF Doc Append Printer
      iii. Set **Application Plan** to: *IN Document Append Workflow*

6. On the **Document Keys** tab:
   a. Ensure all Document Key Values are set to **Application**
   b. Click **OK** to close the *New Capture Profile* window

7. The new printer capture profiles will appear
8. Repeat steps 3-6 to create each of the Capture Profiles
9. Click **Close** on the *Capture Profiles* window once all necessary Capture Profiles have been created
**APPENDING TO AN EXISTING DOCUMENT IN THE DOCUMENTS VIEW**

1. With a document open in Perceptive Content:
   a. Open the document you want to append to the already opened document
   b. Click **File** → **Print**
   c. Select the ImageNow Printer
   d. Click the **Print** button

2. The ImageNow Print window will open
   a. Select **Doc Append Printer** for the Capture Profile
   b. Click **OK**

1. The Perceptive Content Viewer-Single Scan window will open with the same document keys as the original document opened in Perceptive Content; Verify the image is acceptable. If the document has multiple pages, click the ‘Next Page’ arrow at the bottom of the page to view the remaining pages of the document.

2. Click the Save button; the Perceptive Content Viewer window will close.

   a. You may receive a pop-up warning stating that any properties on the original document will be overwritten with the properties defined on the new document; click **OK** if you approve
3. To verify the page(s) were appended, go back to the original document still open in the Perceptive Content Viewer; click **Save** and notice the new page(s) have been appended to the end of the original document.
APPENDING TO AN EXISTING DOCUMENT WITHIN WORKFLOW

1. With a document open in Perceptive Content (in the Workflow view):
   a. Open the document you want to append to the already opened document
   b. Click File ➔ Print
   c. Select the ImageNow Printer
   d. Click the Print button

2. The ImageNow Print window will open
   a. Select WF Doc Append Printer for the Capture Profile
   b. Click OK

3. The Perceptive Content Viewer - Single Scan window will open with the same document keys as the original document opened in Perceptive Content; Verify the image is acceptable. If the document has multiple pages, click the 'Next Page' arrow at the bottom of the page to view the remaining pages of the document.

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LOCATE A DOCUMENT WITHIN PERCEPTIVE CONTENT

DOCUMENT SEARCH: QUICK SEARCH

1. Select the drop-down arrow next to Documents on the Perceptive Content toolbar; select the Document view you wish to search against (the options may vary depending upon your access).

2. The Perceptive Content Explorer window will open; the Quick Search tab contains dropdown lists corresponding to document index fields and operators which can be used for searching.

3. Populate your search by using the drop-down arrows and entering your search criteria. Once completed, select Go to generate your search.

4. Found documents matching search criteria will populate below the search bar. To view/open a document, double-click the record row.

SEARCH TIP: WILDCARD SYMBOL

The percent sign (%) is a wild card symbol and can be used in any of the Perceptive Content search fields, including the Quick Search. For example, enter %reg for a known first name but unknown last name.
MESSAGE CENTER

Description

The Message Center allows users to monitor workflow queues from the Perceptive Content Toolbar.

Setup

1. On the Perceptive Content toolbar, click Settings > Show Message Center. This will turn on the Message Center.
2. On the Perceptive Content toolbar again, click Settings > Options...
3. In the Options window, click Toolbar in the menu on the left
4. Click the Message Center tab
5. Click on each box next to the workflow queues you want to appear in the Message Center
6. Click OK
7. The Message Center shows the number of documents in each of the workflow queues listed.

8. Double-click on a workflow queue to open the Perceptive Content Explorer to view the documents in the workflow queue.