<u>Perceptive Experience Content Apps Foundation (EP4) 3.4.1</u>

What is Perceptive Experience?

Perceptive Experience is a web application for accessing Perceptive Content and can be accessed from any web browser.

To access **Perceptive Experience Content Apps**

Test Instance https://tst.experience.siss.duke.edu/.

PROD Instance https://experience.siss.duke.edu/

<mark>**Login using your NetID and Net ID password**</mark>
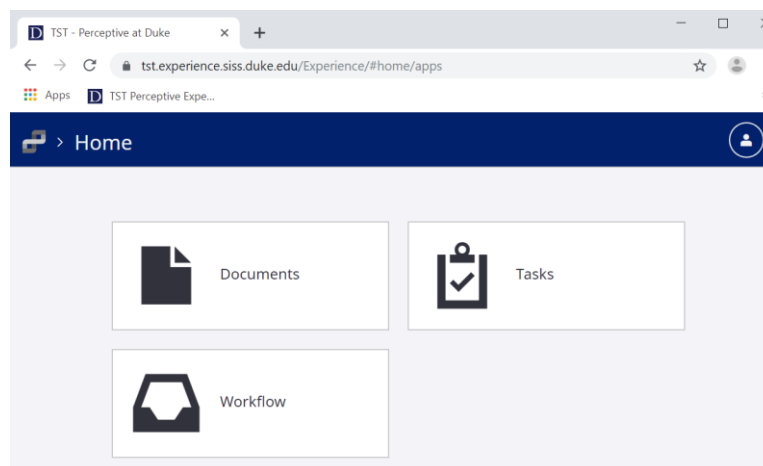
To Logout of Perceptive Experience – click the person icon in the top right-hand corner and choose Disconnect
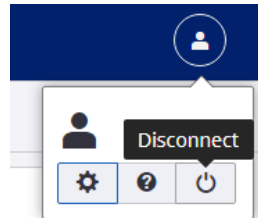
What can you do in Perceptive Experience 3.4.1?

- Search for and view documents
- Add pages to existing documents
- Process **documents** in workflow
- Annotate documents
- Edit the primary index keys for documents (name, drawer, fields 1-5, doctype)
- View the "notes" section of documents
- Print/export documents
- Access Folders from the Folder View or Workflow
- Edit the primary index keys for documents (

What can't do in Perceptive Experience 3.4.1?

Perceptive Experience cannot currently do the following tasks:

- Capture documents/add pages to existing documents via LearnMode Application Plan
- Administrative functions ex: manage workflow queues, views (only can be done via the desktop client Management Console)
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Note: Users looking to perform any of these functions should use the Perceptive Content 7.7.0.111 desktop client.
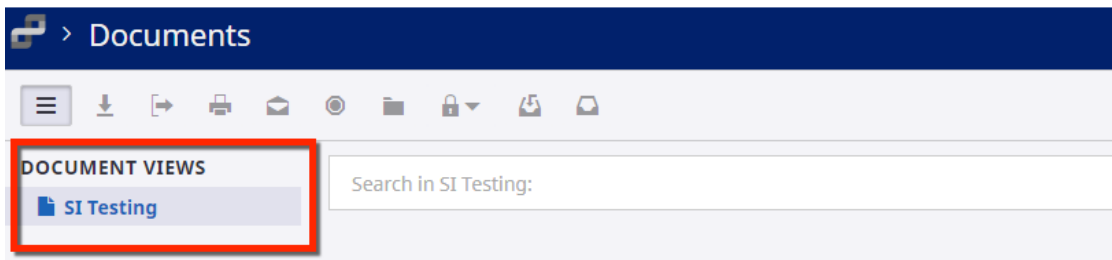
How do I use Perceptive Experience 3.4.1?

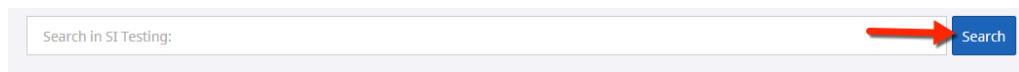### Perceptive Experience - Searching for and viewing documents

1. Choose "Documents" from the home page.
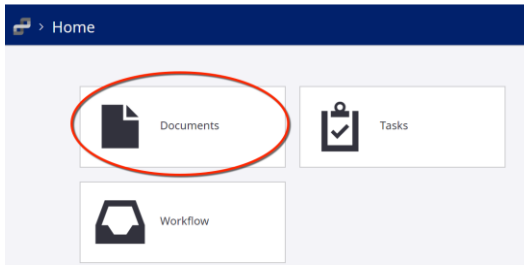
2. A list of views available to you will display on the left-hand side of the page. Click the view that you'd like to open.
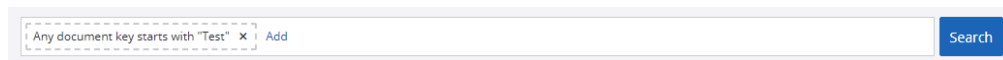

3. Searching for documents:
   a. To see all documents available to you for the selected view, click **Search**.

   b. To search within the documents for the selected view, click **Search in [view name]**. Use the drop-down menus to select the parameters for the search.
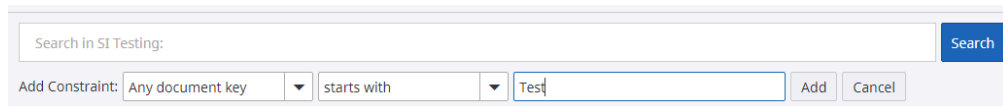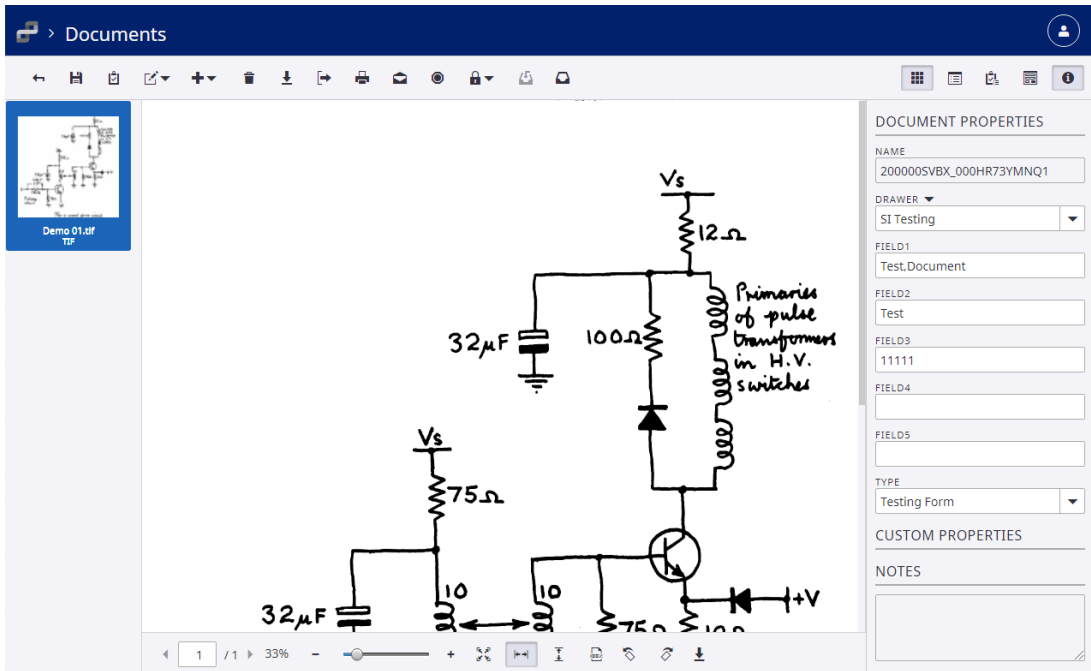

   c. To add an additional search parameters, click **Add** in the search bar.

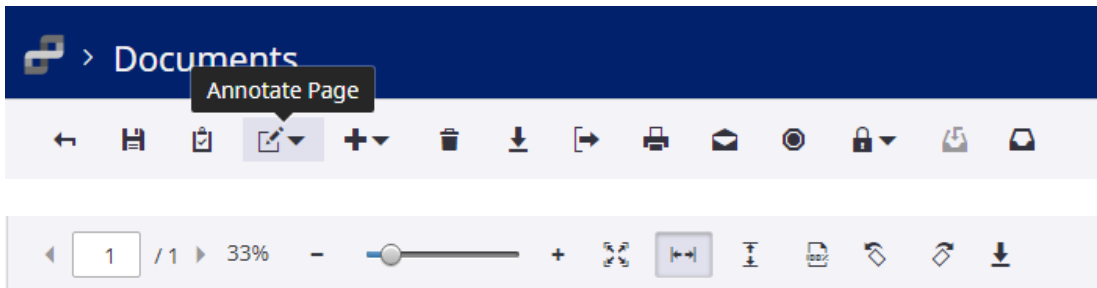4. When finished setting search parameters, click **Search**. A list of results will display.

5. Click on a document in the list to open.

6. Use the toolbars at the top and bottom of the page to manipulate the document. Place Mouse over a button to see its function.

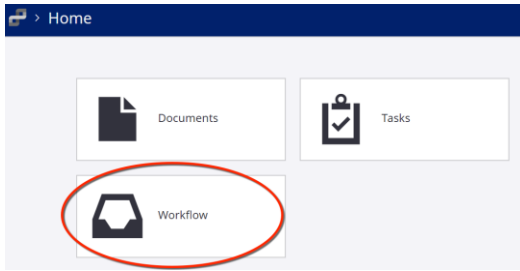   Ex: Annotate, Save, Zoom in/out, Export to file/PDF, etc.

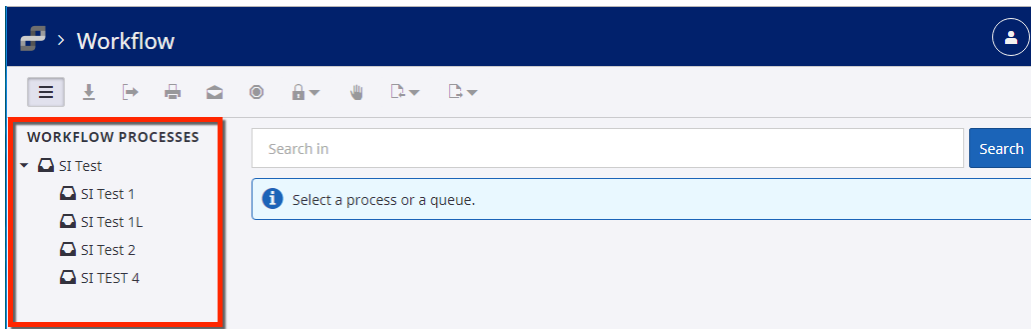7. To go back to the Workflow queue, select back arrow button

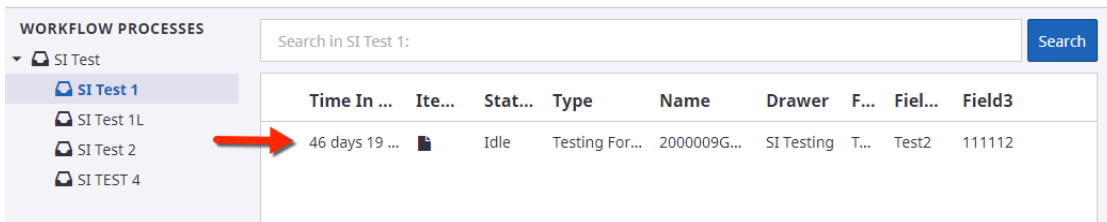**Perceptive Experience - Processing documents in workflow**

1. Choose "Workflow" from the home page.

2. Choose a workflow queue from the navigation panel on the left-hand side of the page. The list of documents in the queue will display automatically.
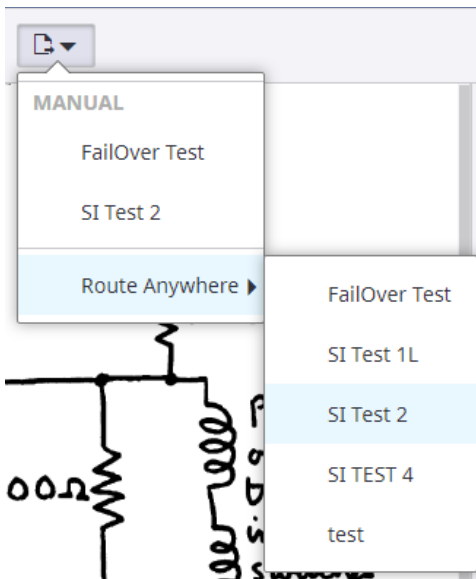

3. Click on a document to open it or use the search bar to add search parameters and find specific documents.

4. The document will display. Use the toolbar at the top to route the document forward or backward as well as other functions such as annotations. Place Mouse over a button to view its function.
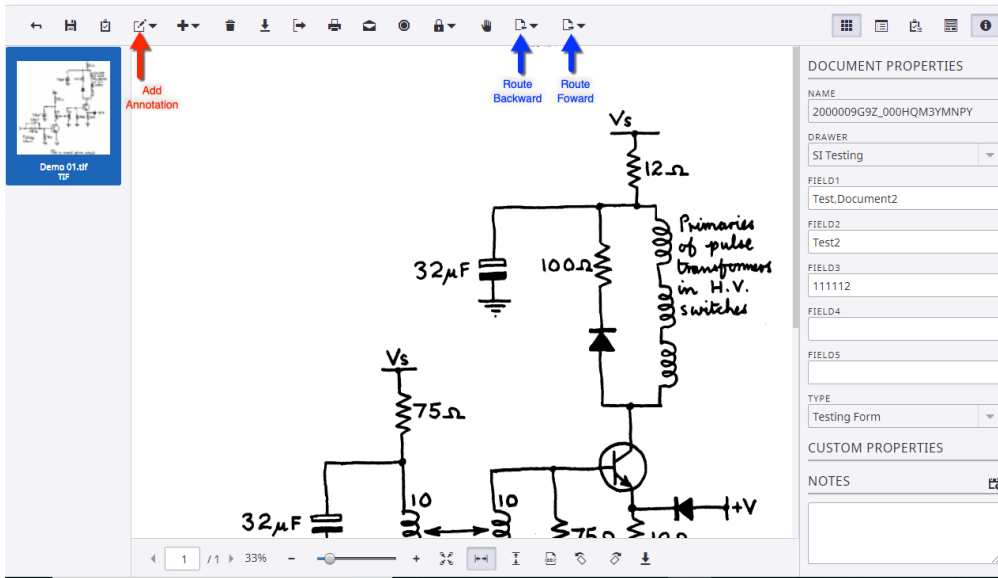
5. The drop-down menu under the Route Forward button contains the **Route Anywhere** option.

6. To go back to the Workflow queue, select back arrow button