# Cutover: Imaging Service

Julie Martinelli \\ Imaging Service Team Lead
David Turner \\ Imaging Service System Engineer

**Office of Human Resources**
UNIVERSITY OF WISCONSIN–MADISON

# Cutover\\ Agenda

# Overview\\ The Change

**Capture Profiles** that you use to bring your documents into **Perceptive Content** need to change to use the **Betty Blocks Application Plan** for Workday integration.

*This affects anyone who uses Perceptive Content to link documents.*

# Overview \\ Perceptive Content 101

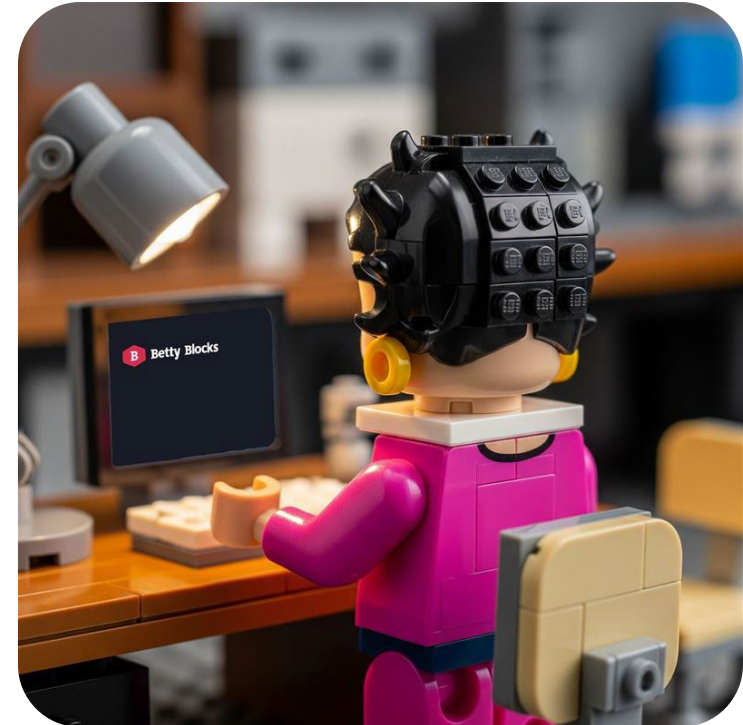**Application Plan**: Connects Perceptive Content to other applications for data extraction.

**Capture Profile**: Configures how physical or electronic documents are brought into Perceptive Content. Capture Profiles use an Application Plan to scan and link documents.

# What is Changing \\ What is Betty Blocks?

**Betty Blocks** *is not* a woman named Betty that is made of blocks.

**Betty Blocks** *is* a development platform that can be used to quickly build integration applications with simple coding blocks

# What is Changing \\ Betty Blocks

**Betty Blocks** is an intermediary page that pulls in data from Workday so it can be used as the Application to link documents in Perceptive Content.

**Betty Blocks data will refresh/update daily**. E.g. if a new person is added to Workday on September 5, they will be available in Betty Blocks September 6.

A **Betty Blocks Application Plan** has been created and will be used with current **Capture Profiles**.

*HOW you start to use the Betty Blocks Application Plan depends on whether your Capture Profiles live on your machine (client-side capture profiles), or live on the server (server-side capture profiles)*

# What is Changing \\ Betty Blocks

**Betty Blocks Page**

## *https://ohr-applications-a013.betty.app/app-page*

*HOW you start to use the Betty Blocks Application Plan depends on whether your Capture Profiles live on your machine (client-side capture profiles), or live on the server (server-side capture profiles)*

# What is Changing \\ Application Plan

**Current Application Plan (for HRS)**:

Ends in "Chrome1" (e.g. A_OHR_Pfile_Learn_SMPH_Chrome1)

**Future Betty Blocks Application Plan (For Workday)**:

Ends in "**BB**" (e.g. A_OHR_Pfile_Learn_SMPH_BB)

*HOW you start to use the Betty Blocks Application Plan depends on whether your Capture Profiles live on your machine (client-side capture profiles), or live on the server (server-side capture profiles)*

# Preparations\\ Server-Side Capture Profiles

**Users with Server-Side Capture Profiles**

The new **Betty Blocks Application Plan will be your default** when you select a Capture Profile. **No additional action is required**.

A_OHR Groups with no additional action required: CALS \\ DoIT \\ DOS \\ EDU \\ ENRMGT \\ EXTN \\ FPM \\ LAW \\ LIBR \\ LS \\ NURSE \\ PHARM \\ PUBM \\ RECSP \\ SMPH \\ SOHE \\ UHS \\ WSB \\ WU \\ WVDL

# Preparations\\ Client-Side Capture Profiles

**Users with Client-Side Capture Profiles**

You will **modify your Capture Profiles** to use the new **Betty Blocks Application Plan**.

A_OHR Groups that will need to make a manual change: Benefits \\ CHR \\ ENGR \\ GSERV \\ OHRStaff \\ Payroll \\ Super_Users \\ VCRGE

*Didn't see your group on either page? Have questions about Server-Side Capture Profiles?* *Contact us!*

# Next Steps \\ Dates

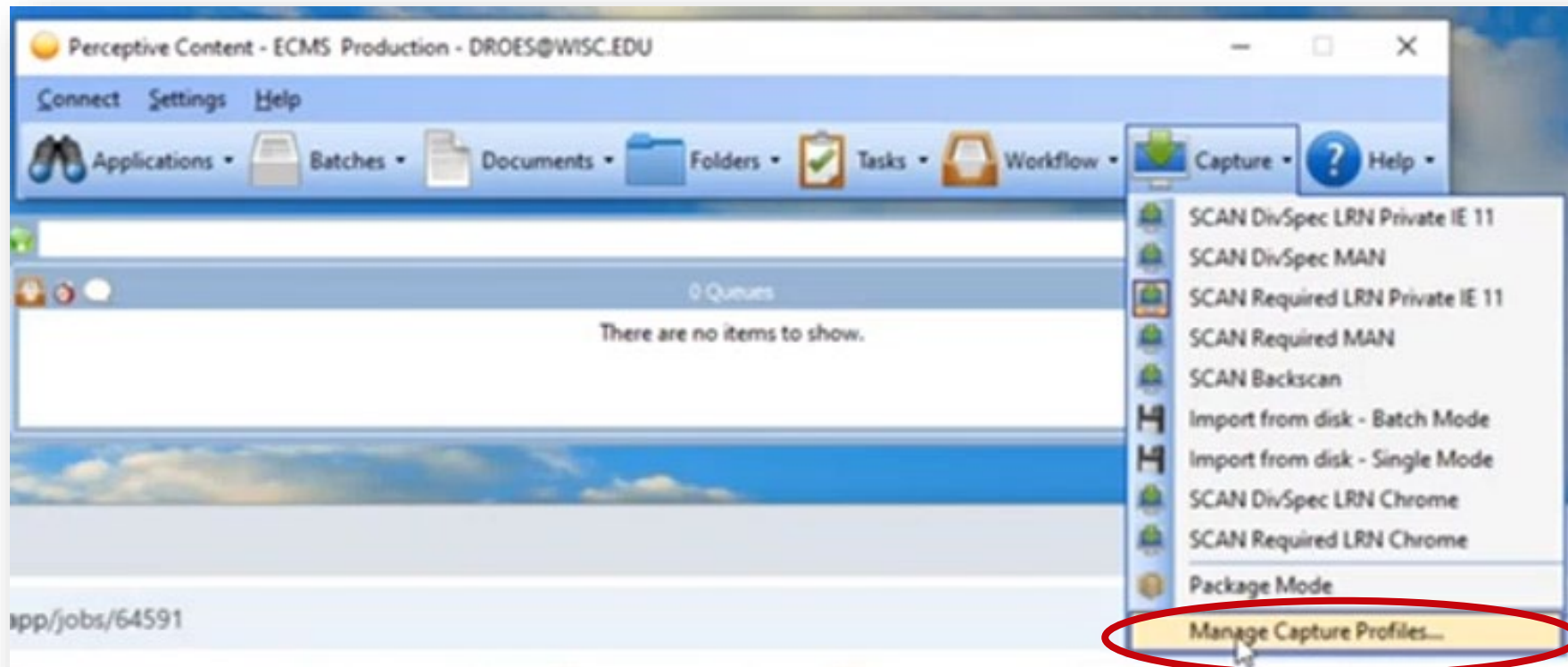| Date | Action |
| --- | --- |
| **June 30** | HRS becomes view only. |
| **July 1 – 6** | Do not use HRS or Betty Blocks to link documents. |
| **July 1 - 6** | Betty Blocks application plan available for use, and added to the server-side capture profiles. |
| **July 1 - 6** | Groups using client-side capture profiles should update to use the Betty Blocks application plan. |
| **July 6** | Chrome1 Application Plans (and older) will be unavailable. |
| **July 7** | Start using Betty Blocks instead of HRS (pending notification from HR/ATP). Daily data refresh. |

# Next Steps\\ Betty Blocks (BB) Application Plan

1. Log into **Betty Blocks** and **Perceptive Content**

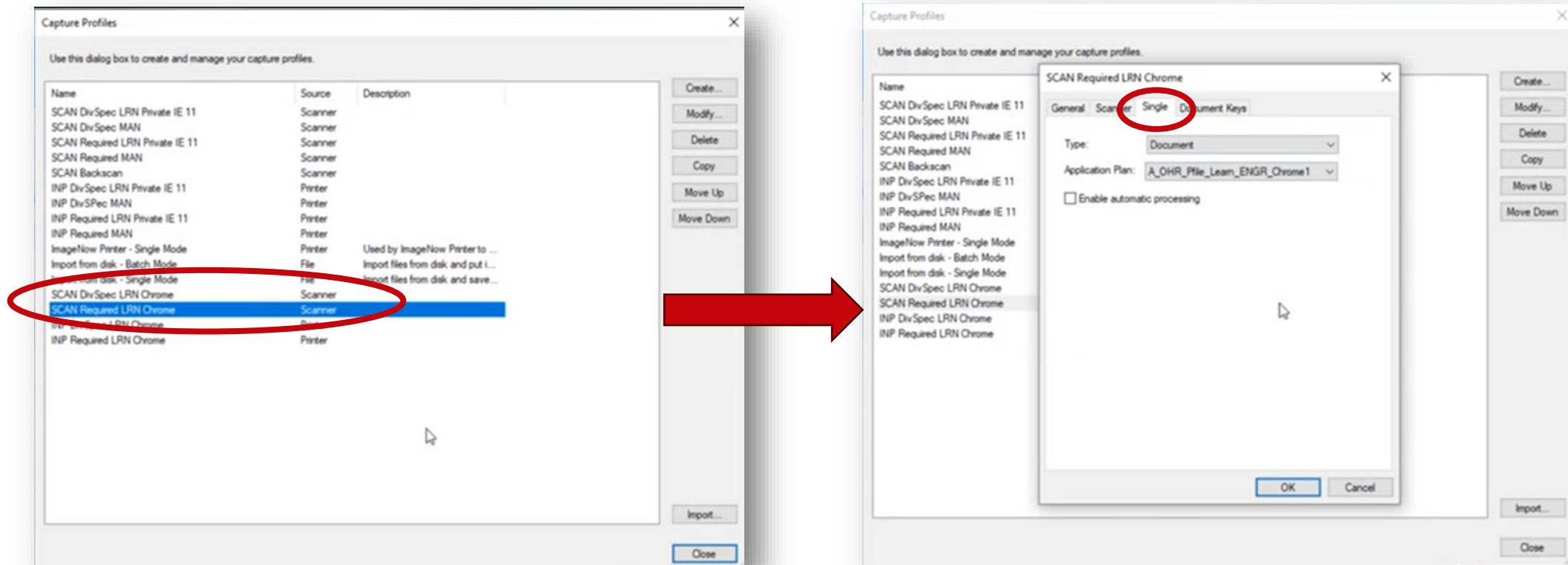| Client-Side Capture Profiles | Server-Side Capture Profiles |
|---|---|
| 2. Next to Capture, select the Down Arrow | Use your Capture Profile(s) as usual |
| 3. From the dropdown select Manage Capture Profiles | |
| 4. Double-click a Capture Profile you want to edit | |
| 5. Go to Single/Batch tab | |
| 6. Select the new Application Plan that ends in **BB** > OK | |
| 7. Use your updated Capture Profile(s) | |

# Next Steps\\ Step-by-step

In Perceptive Content next to Capture select the Down Arrow > Manage Capture Profiles

# Next Steps\\ Step-by-step

Double-click a Capture Profile you want to edit.
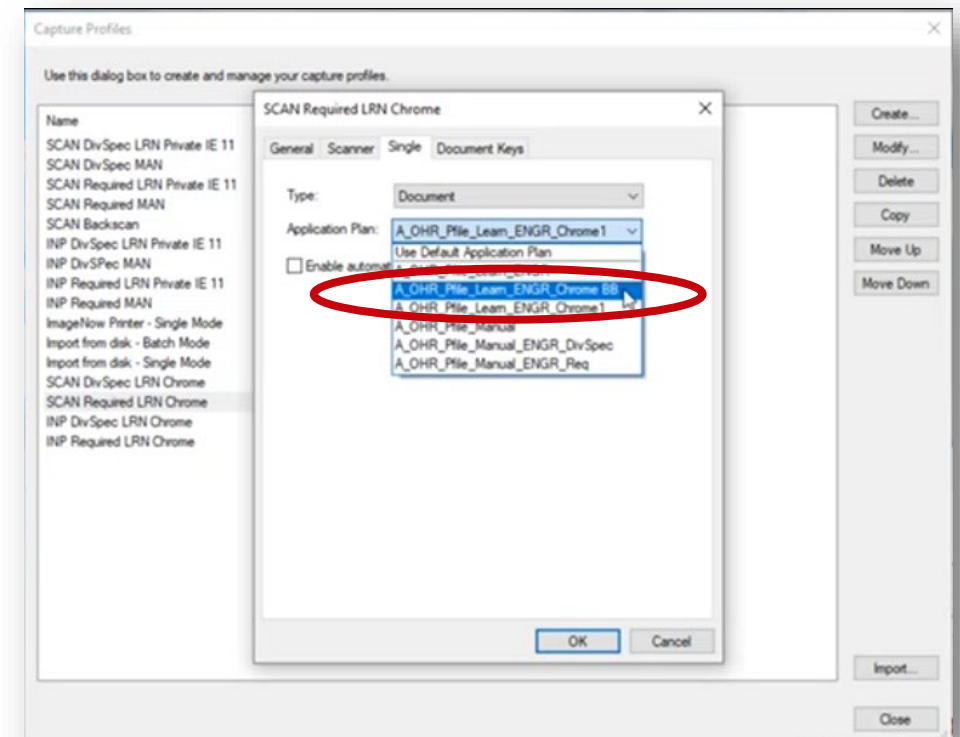Select the single/batch tab.

# Next Steps \\ Step-by-step

Select the new Application Plan that ends in **BB** > OK

Repeat with all Capture Profiles you need to update

This will need to be done on all machines that are used to capture documents.

# Next Steps\\ Step-by-step

**Betty Blocks** Application Plan can now be used with your Capture Profiles

*https://ohr-applications-a013.betty.app/app-page*

# Questions?

## https://kb.wisc.edu/151881

### *Thank you!*

imaging@doit.wisc.edu

Office of Human Resources
UNIVERSITY OF WISCONSIN–MADISON