Using the ImageNow Client

VERSION: 1.0
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Opening the ImageNow Client

1. Click the ImageNow icon.

2. Enter your Onyen and Password.

3. Click the Connect button to display the ImageNow toolbar.
QAing a Batch of Documents

1. Click the **Batches** button.

2. Click **Ready for QA**.

3. Double-click a batch (you can click anywhere on the row).

4. For each page in the batch, select the appropriate action:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark page as OK</td>
<td>Click to indicate page image is acceptable.</td>
</tr>
<tr>
<td>Rescan this page</td>
<td>Used when image is not acceptable and page must be scanned again.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>rescan</td>
<td>rescanned.</td>
</tr>
<tr>
<td>Commit this batch</td>
<td>Click to indicate all pages are acceptable and close the batch.</td>
</tr>
<tr>
<td>Suspend this batch</td>
<td>Closes the batch to be QA’d at a later time.</td>
</tr>
<tr>
<td>Delete this page</td>
<td>Deletes the page from the batch.</td>
</tr>
</tbody>
</table>

5. Continue QAing the batch. Once you mark the last page as OK, ImageNow will close the batch and the batch will have a “Completed” status.

| 720939 | Completed | 3 | 3 |

Note: If you suspended the batch, you must re-open the batch and repeat the steps above to finish QAing the batch. The suspended batch will have a “Suspended” status.

| 720937 | Suspended | 3 | 3 |
Linking a Document to a Voucher

1. Click the **Batches** button.

2. Click **Ready for Linking**.

3. Double-click a batch (you can click anywhere on the row).

4. For each page in the batch, select the appropriate action:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link this page</td>
<td>When this button is clicked, ImageNow will attempt to pull data from a voucher in an open PeopleSoft window.</td>
</tr>
<tr>
<td>Hold this page</td>
<td>Allows you to skip ahead to the next document in the batch. When the batch is reopened at a later time, the held page will be</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>available for linking again.</td>
</tr>
<tr>
<td>Suspend this batch</td>
<td>Closes the batch to be linked at a later time.</td>
</tr>
<tr>
<td>Delete this page</td>
<td>Deletes the page from the batch.</td>
</tr>
</tbody>
</table>

5. Once you have a page to link, navigate to the appropriate voucher in PeopleSoft.

6. Using the **Find an Existing Value** search screen, locate the appropriate voucher.

   ![Finance Menu ➔ Accounts Payable ➔ Vouchers ➔ Add/Update ➔ Regular Entry](image)

7. Click the **Invoice Information** tab.

8. In ImageNow, click **Link this page**.
9. Verify that ImageNow copied the correct information from the voucher in PeopleSoft in the Document Keys area.

![Document Keys](image)

10. Select the appropriate Document Type.

![Document Type](image)

11. Click **Save this page** to complete linking the page and move to the next page in the batch.

![Save this page](image)

12. Continue linking the pages in the batch. Once you save the last page, ImageNow will close the batch and you won’t see it in the list of Ready For Linking batches.

Note: If you suspended the batch, you must re-open the batch and repeat the steps above to finish linking the pages in the batch. The suspended batch will have a “Suspended” status.

![Batch Status](image)
Viewing Documents in the ImageNow Client

1. Click the **Documents** button.

2. Click **Documents**.

3. Search for your document using one of the search options provided.

4. Double-click anywhere on the row of the document you want to open.
Viewing Attached Documents in PeopleSoft

1. Navigate to the appropriate voucher in PeopleSoft.

2. Using the **Find an Existing Value** search screen, locate the appropriate voucher.

3. Click the **Invoice Information** tab.

4. Click the **ImageNow Attachments** link.

5. Click the **View** button.
Re-Linking a Document to a Voucher

1. Click the Documents button.

2. Click Documents.

3. Search for your document using one of the search options provided.

4. Double-click anywhere on the row of the document you want to open.

5. Once you have found a page to re-link, navigate to the appropriate voucher in PeopleSoft.
6. Using the **Find an Existing Value** search screen, locate the appropriate voucher.

   ![Find an Existing Value search screen]

   **Voucher**
   
Enter any information you have and click Search. Leave fields blank for:

   - [Find an Existing Value](#)
   - [Add a New Value](#)

   **Search Criteria**
   
   Business Unit: = UNCCH
   
   Voucher ID: begins with
   
   Invoice Number: begins with
   
   Invoice Date: =

7. Click the **Invoice Information** tab.

   ![Invoice Information tab]

8. In ImageNow, click **Edit this document’s properties**.

   ![ImageNow edit document properties]

   ![Actions menu]

   - Export this document to file
   - Print this document
   - Send this document to an ImageNow user
   - Copy this document
   - **Edit this document’s properties**
9. Verify that ImageNow copied the correct information from the voucher in PeopleSoft.

![Document Keys]

10. Select the appropriate Document Type.

![Document Type]

11. Click the **Save** button.

![ImageNow Viewer]

Processing VISP Documents

1. Click the Documents button.

2. Click Documents.

3. Click FIN - AP Invoices - Ext Vendors.

4. Double-click anywhere on the row of the document you want to open.

5. Once you have the invoice open, note the Invoice Number, Invoice Date and Purchase Order Number.

6. In PeopleSoft, navigate to the page to create a new voucher.
7. Fill in any required fields and click the Add button.
8. Enter the **Invoice Number** and **Invoice Date**.

![Invoice Number and Date](image)

9. Enter the **PO Unit** and **PO Number**.

![PO Unit and Number](image)

10. Click the Copy PO button.

![Copy PO Button](image)

11. Click the Save button at the bottom of the screen.

![Save Button](image)

13. Make sure you are on the **Invoice Information** tab.

![Invoice Information Tab](image)

13. In ImageNow, click **Edit this document’s properties**.
14. Verify that ImageNow copied the correct information from the voucher in PeopleSoft.

15. Select the appropriate Document Type.

16. Click the Save button.