

Using the ImageNow Client

VERSION: 1.0

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Opening the ImageNow Client

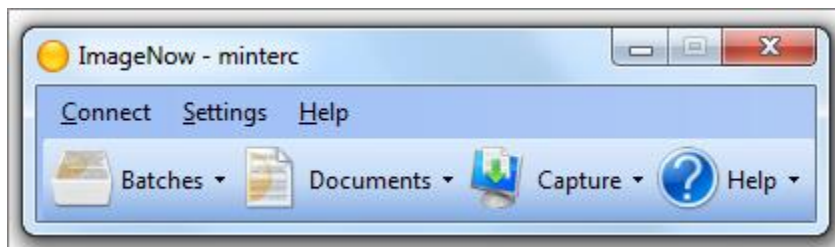
1. Click the ImageNow icon.



2. Enter your **Onyen** and **Password**.

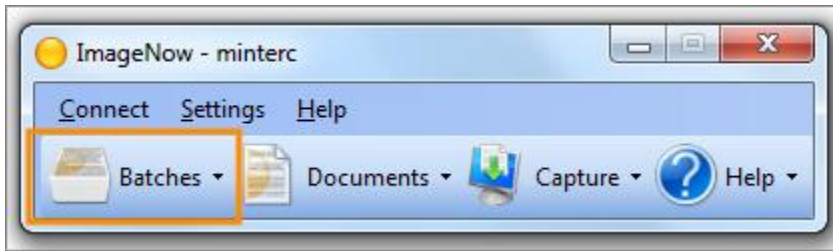


3. Click the **Connect** button to display the ImageNow toolbar.

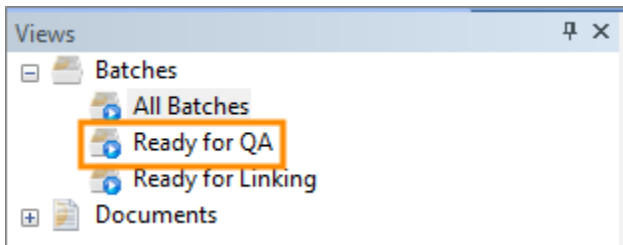


QAing a Batch of Documents

1. Click the **Batches** button.



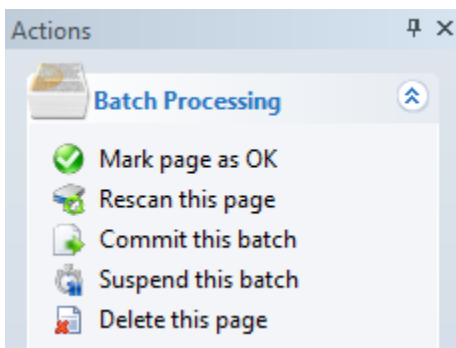
2. Click **Ready for QA**.



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

| Status | Batch Sequence | State | Pages |
|--------|----------------|-----------|-------|
| | 720939 | Completed | 3 |
| | 720938 | Completed | 3 |
| | 720937 | Completed | 3 |


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



| Action | Description |
|------------------|--|
| Mark page as OK | Click to indicate page image is acceptable. |
| Rescan this page | Used when image is not acceptable and page must be |

| Action | Description |
|---------------------------|---|
| | rescanned. |
| Commit this batch | Click to indicate all pages are acceptable and close the batch. |
| Suspend this batch | Closes the batch to be QA'd at a later time. |
| Delete this page | Deletes the page from the batch. |

- 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.

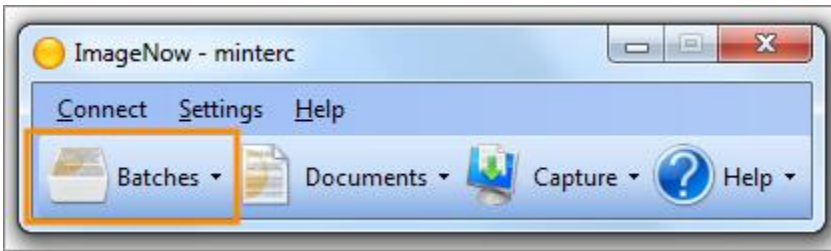
| | | | | |
|---|--------|-----------|---|---|
|  | 720939 | Completed | 3 | 3 |
|---|--------|-----------|---|---|

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.

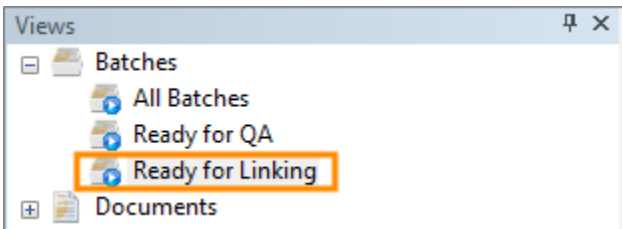
| | | | | |
|---|--------|-----------|---|---|
|  | 720937 | Suspended | 3 | 3 |
|---|--------|-----------|---|---|

Linking a Document to a Voucher

1. Click the **Batches** button.



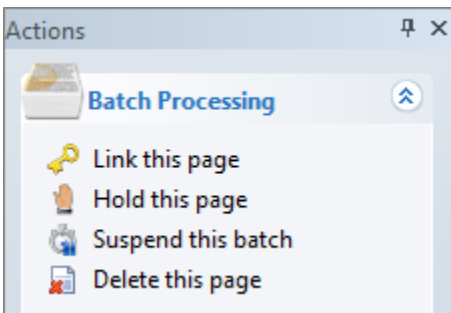
2. Click **Ready for Linking**.



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

| Status | Batch Sequence | State | Pages | Pages Pen... |
|--------|----------------|-----------|-------|--------------|
| | 720984 | Suspended | 1 | 1 |
| | 720939 | Completed | 3 | 3 |

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



| Action | Description |
|-----------------------|---|
| Link this page | When this button is clicked, ImageNow will attempt to pull data from a voucher in an open PeopleSoft window. |
| Hold this page | 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 |

| Action | Description |
|---------------------------|--|
| | available for linking again. |
| Suspend this batch | Closes the batch to be linked at a later time. |
| Delete this page | Deletes the page from the batch. |

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

Finance Menu ▾ > Accounts Payable ▾ > Vouchers ▾ > Add/Update ▾ > Regular Entry

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

Voucher

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


▽ Search Criteria


Business Unit: = ▾ 🔍
 Voucher ID: begins with ▾
 Invoice Number: begins with ▾
 Invoice Date: = ▾ 📅

- Click the **Invoice Information** tab.

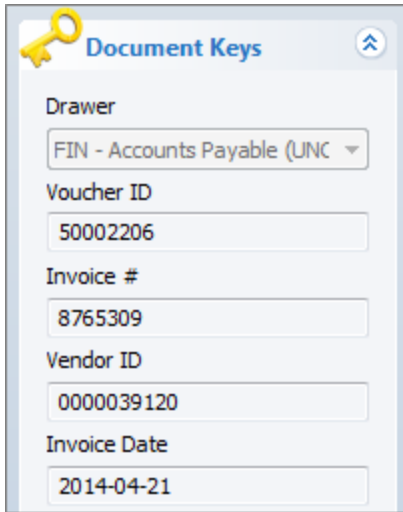
- In ImageNow, click **Link this page**.

Actions 🔍 ×


Batch Processing ⬆️


 Link this page

- Verify that ImageNow copied the correct information from the voucher in PeopleSoft in the Document Keys area.



Document Keys

Drawer
FIN - Accounts Payable (UNC)

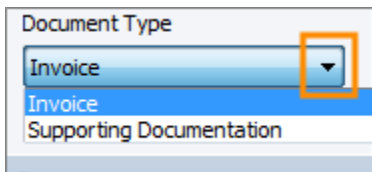
Voucher ID
50002206

Invoice #
8765309

Vendor ID
0000039120

Invoice Date
2014-04-21

- Select the appropriate Document Type.



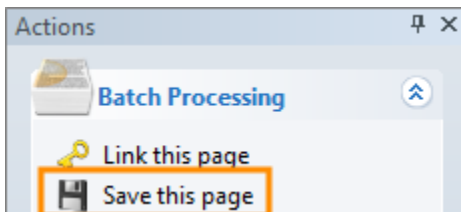
Document Type

Invoice

Invoice

Supporting Documentation

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



Actions


Batch Processing

Link this page

Save this page

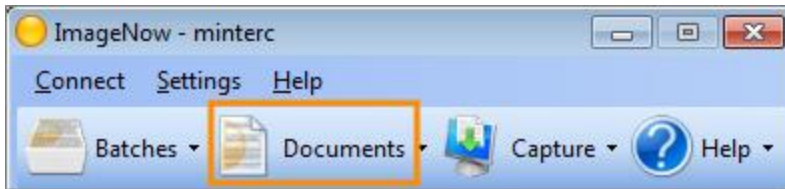
- Continue linking the pages in the batch. Once you save the last page, ImageNow will close the batch and you won't see it in the list of Ready For Linking batches.

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.

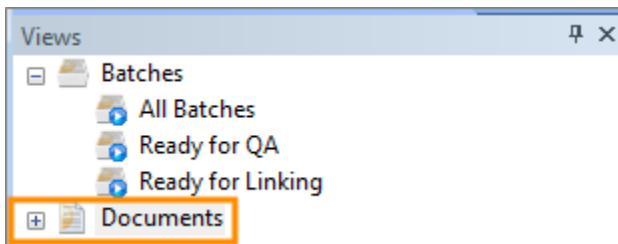
| | | | | |
|---|--------|-----------|---|---|
|  | 720939 | Suspended | 3 | 1 |
|---|--------|-----------|---|---|

Viewing Documents in the ImageNow Client

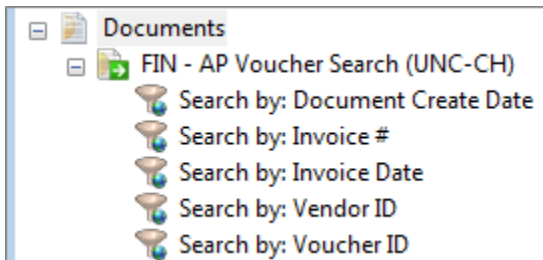
1. Click the **Documents** button.



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.

| Drawer | Invoice # | Voucher ID |
|---------------------------------|-----------|------------|
| FIN - Accounts Payable (UNC-CH) | 8765309 | 50002206 |
| FIN - Accounts Payable (UNC-CH) | 8765309 | 50002206 |

Viewing Attached Documents in PeopleSoft

1. Navigate to the appropriate voucher in PeopleSoft.

Finance Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

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

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: = ▼ 📅

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

[Summary](#) [Related Documents](#) [Invoice Information](#) [Payments](#)

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

[Session Defaults](#)

[Imagenow Attachments](#)

[Comments\(0\)](#)

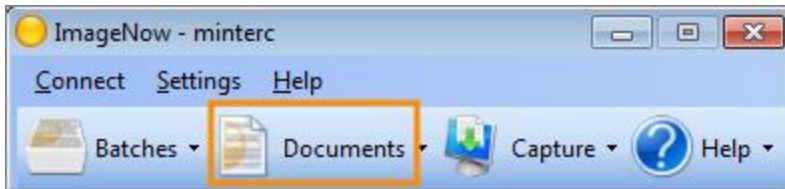
[Approval History](#)

5. Click the **View** button.

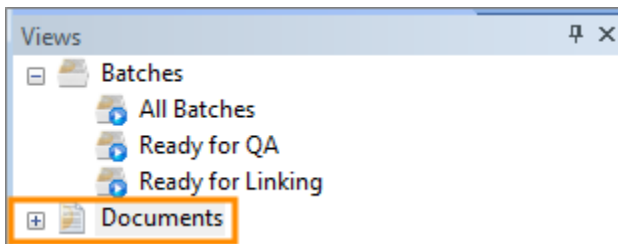
| Attachments | | Personalize Find 📄 📅 | | First | |
|-------------|---|---|---|----------------------------|---------------|
| | View | Add | Delete | Added On | Document Type |
| 1 |  |  |  | 2014-09-21-11.59.57.000000 | Invoice |

Re-Linking a Document to a Voucher

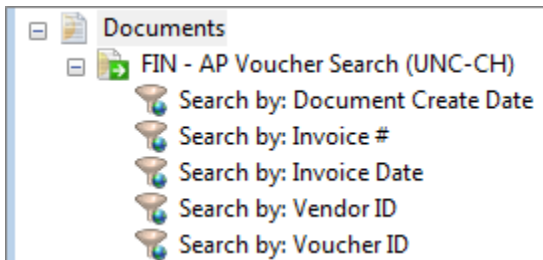
1. Click the **Documents** button.



2. Click **Documents**.



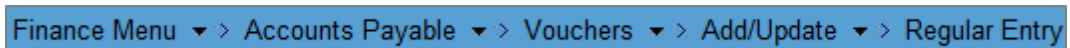
3. Search for your document using one of the search options provided.



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

| Drawer | Invoice # | Voucher ID |
|---------------------------------|-----------|------------|
| FIN - Accounts Payable (UNC-CH) | 8765309 | 50002206 |
| FIN - Accounts Payable (UNC-CH) | 8765309 | 50002206 |

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.

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.

[Summary](#) [Related Documents](#) [Invoice Information](#) [Payments](#)

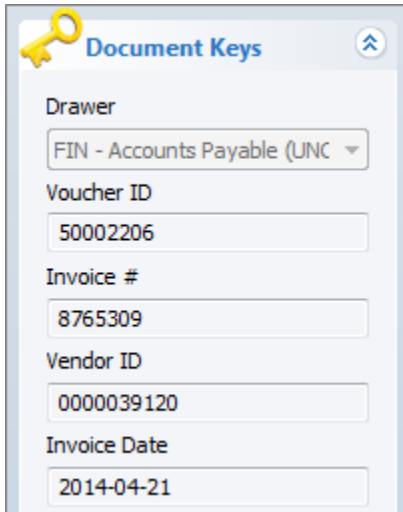
8. In ImageNow, click **Edit this document's properties**.

Actions

Document

- 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

Drawer
FIN - Accounts Payable (UNC)

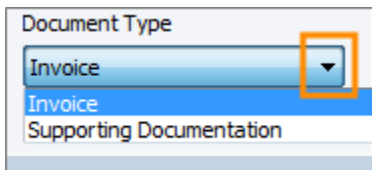
Voucher ID
50002206

Invoice #
8765309

Vendor ID
0000039120

Invoice Date
2014-04-21

10. Select the appropriate Document Type.



Document Type

Invoice

Invoice

Supporting Documentation

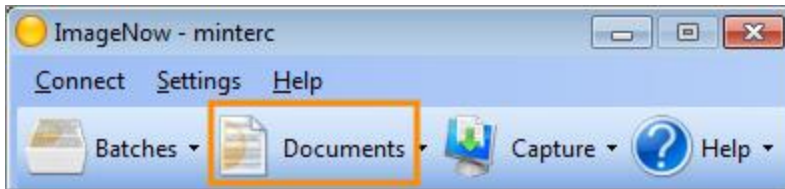
11. Click the **Save** button.



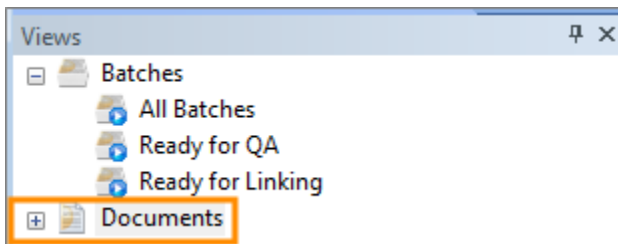
12. Close the ImageNow Viewer window.

Processing VISP Documents

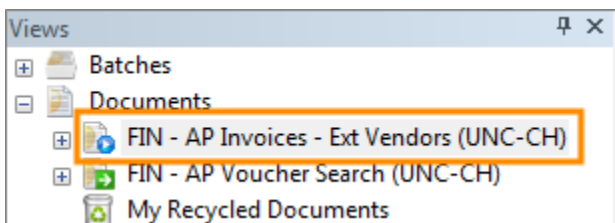
1. Click the **Documents** button.



2. Click **Documents**.



3. Click **FIN - AP Invoices - Ext Vendors**.



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

| Drawer | Type |
|---------------------------------|----------------|
| FIN - Accounts Payable (UNC-CH) | Purchase Order |
| FIN - Accounts Payable (UNC-CH) | Purchase Order |
| FIN - Accounts Payable (UNC-CH) | Purchase Order |
| FIN - Accounts Payable (UNC-CH) | Purchase Order |



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.

Finance Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

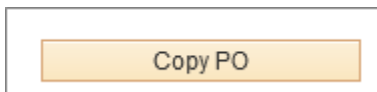
7. Fill in any required fields and click the Add button.
8. Enter the **Invoice Number** and **Invoice Date**.

| | |
|---------------|--|
| Invoice No: | 12345 |
| Invoice Date: | 09/02/2014  |

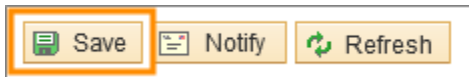
9. Enter the **PO Unit** and **PO Number**.

| Copy From Source Document | |
|---------------------------|--|
| PO Unit: | UNCCH  |
| PO Number: | 2000001116  |

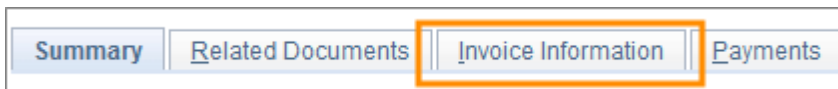
10. Click the Copy PO button.



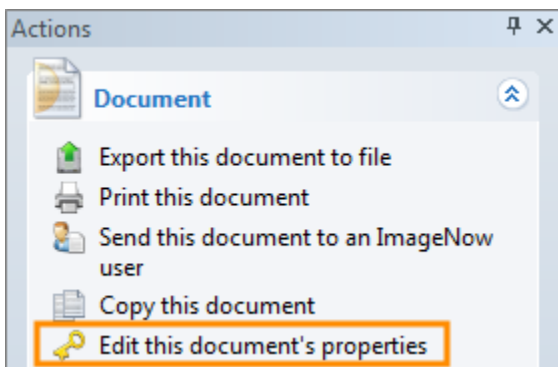
11. Click the Save button at the bottom of the screen.



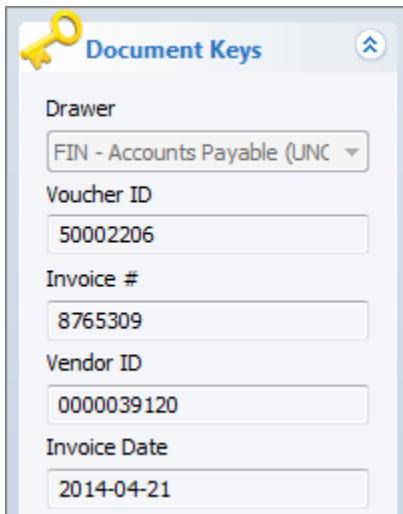
13. Make sure you are on the **Invoice Information** tab.



13. In ImageNow, click **Edit this document's properties**.



14. Verify that ImageNow copied the correct information from the voucher in PeopleSoft.



Document Keys

Drawer
FIN - Accounts Payable (UNC)

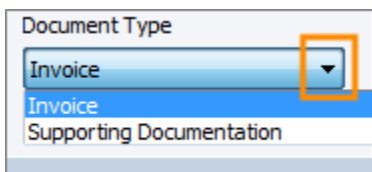
Voucher ID
50002206

Invoice #
8765309

Vendor ID
0000039120

Invoice Date
2014-04-21

15. Select the appropriate Document Type.



Document Type

Invoice

Invoice

Supporting Documentation

16. Click the **Save** button.



17. Close the ImageNow Viewer window.