

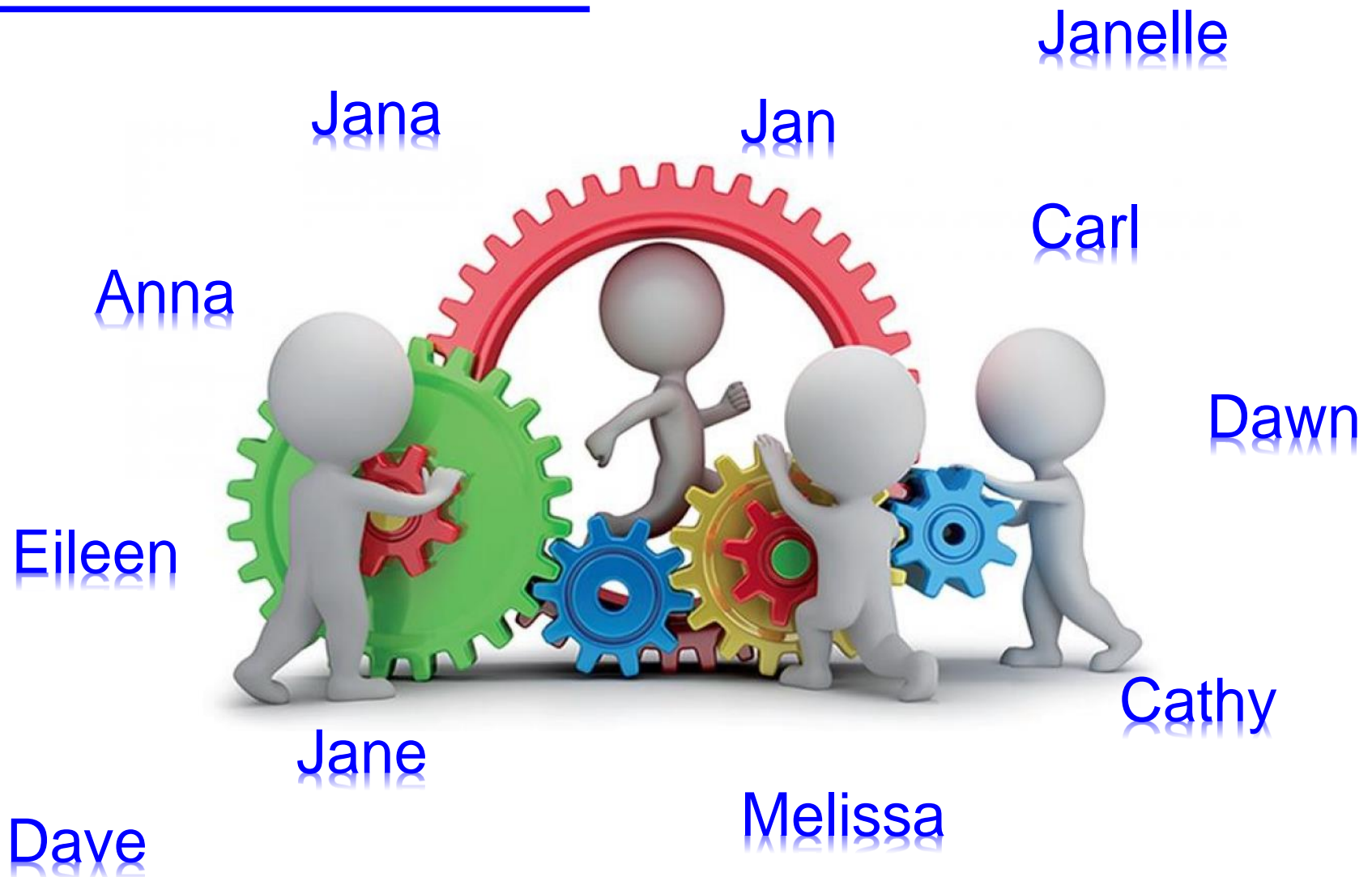
Perceptive Content Refresher

Presented by
Eileen Johnson

September 2018



Meet our Team



How do I receive access to Perceptive Software?

P-Card Asset Mgmt T & E **Forms** Resources

Procurement & Payments Services Webpage

- [Forms](#)
- [Perceptive Content Access Form](#)

Procurement & Payment Services Perceptive Content Access/Modification/Removal

Please note that approval from your department head and Procurement & Payment Services is needed to process the request.

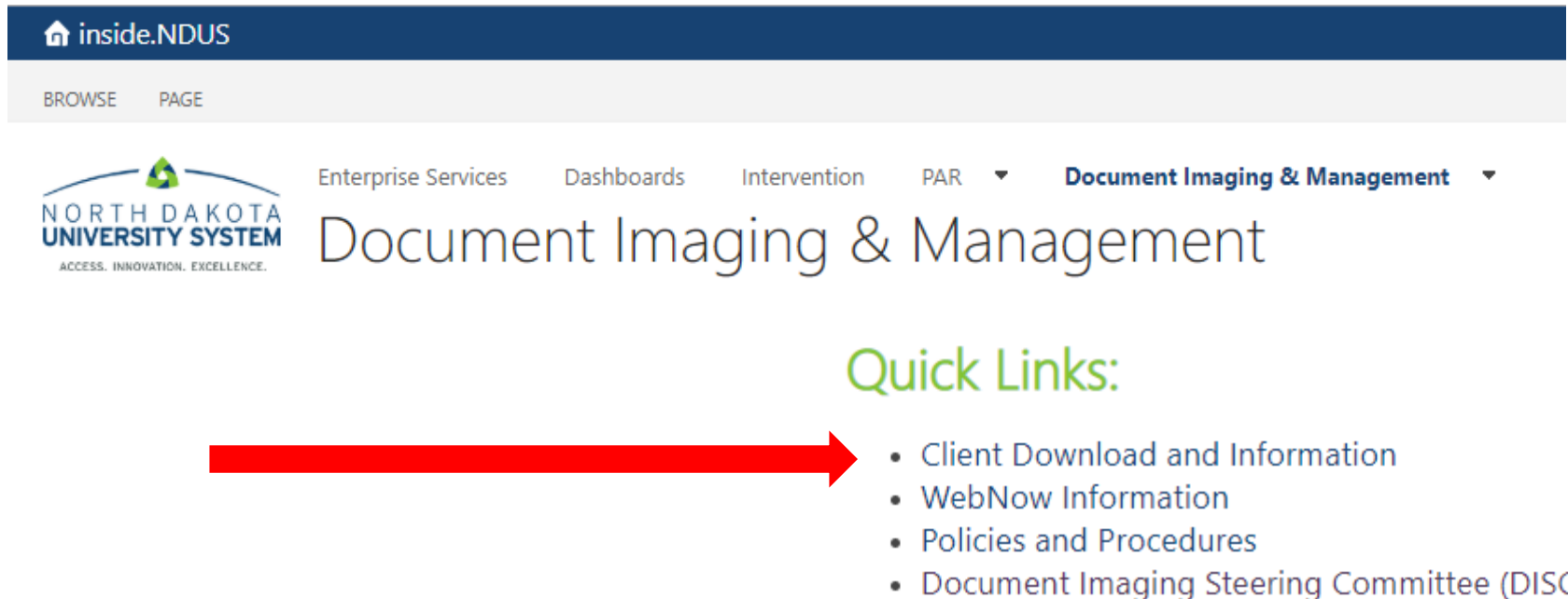
| User Information | | | |
|---|---|--|--|
| Date Submitted | | Contact Number | |
| Name of User | | User Email | |
| Department & Department # | | | |
| Active Directory Userid | | EMPLID | |
| Application and Job Duty | | | |
| Perceptive Content Application | Accounts Payable | Journal Voucher | Journal Entry |
| Access Requested / Removed | <input type="checkbox"/> View <input type="checkbox"/> Create eForm <input type="checkbox"/> Approval <input type="checkbox"/> Remove Access | <input type="checkbox"/> View <i>Workflow coming soon</i> | <input type="checkbox"/> View <i>Workflow coming soon</i> |
| Perceptive Content Application | Purchasing | Contracts | Leases |
| Access Requested / Removed | <input type="checkbox"/> Requestor <input type="checkbox"/> Department Approver <input type="checkbox"/> Remove Access | <input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Remove Access | <input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Remove Access |
| Notes | | | |
| | | | |
| Department Head Approval | | | |
| Department Head Approving the Request (Signature Required) | | | |
| Procurement & Payment Services Approval | | | |
| User Group to give Access to (ex: Power User, Scanner, Viewer, User) | | | |

Software Client Download

- Access software download through SharePoint

[NDUS-CTS-Enterprise Services SharePoint](#)

Login required



The screenshot shows the 'inside.NDUS' SharePoint site. The top navigation bar includes 'BROWSE' and 'PAGE'. The main navigation menu features 'Enterprise Services', 'Dashboards', 'Intervention', 'PAR', and 'Document Imaging & Management'. The 'Document Imaging & Management' page is displayed, featuring the North Dakota University System logo and the text 'Document Imaging & Management'. A 'Quick Links:' section is visible, with a red arrow pointing to it. The quick links are:

- Client Download and Information
- WebNow Information
- Policies and Procedures
- Document Imaging Steering Committee (DISC)

Also on SharePoint

• Support Resources

Access

- Client Download and Information
- WebNow Information
- VPN
- DUO

Quick Links:

How to

- Linking
- Annotations
- Purging and Retention
- Appending, Adding, Moving, and Merging Pages
- Searching
- Delete a Stuck Batch (video)
- Tips and Tricks

Troubleshooting and Fixes

- Fix Documents Stuck in Batch
- WebNow
- Client
- Scanner
- Printer - Printing
- General
- How to find if you are using Edge or Internet Explorer
- How to find Internet Explorer (IE) on Windows 10

System Status:

Scanning and Capture Profiles

- Moving a Scanner
- Setup and Install
- Scanner Guide
- Transfer a Scanner

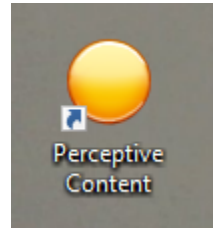
General Information

- Document Imaging Terminology
- Support and Responsibilities

NDUS Annual Assessment

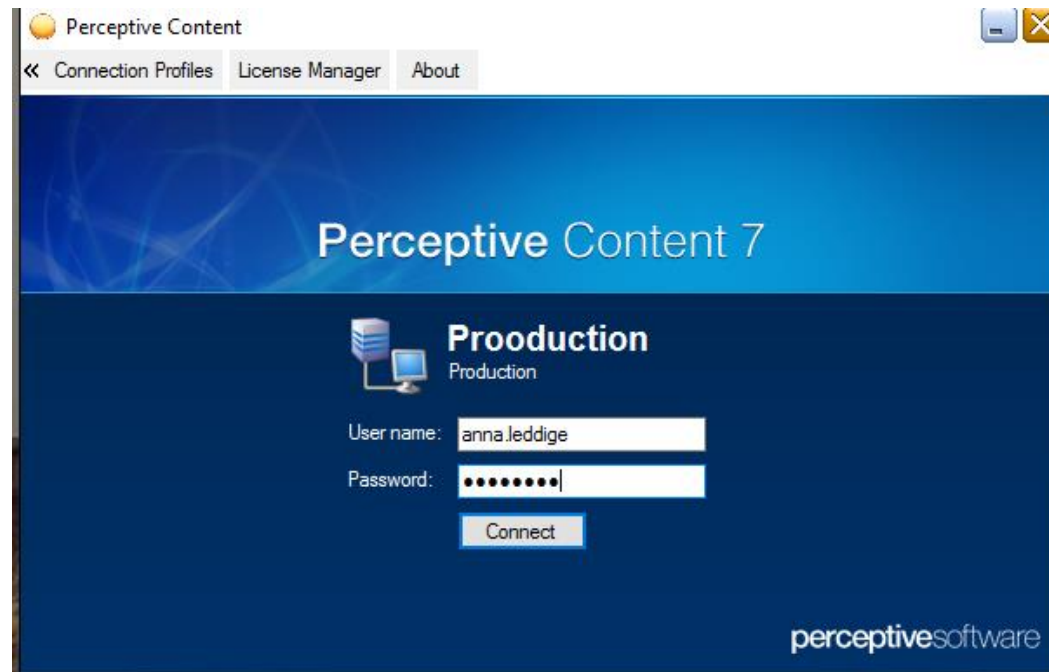
- Required of all Perceptive Content users
- Communicated by CTS – Enterprise Services
- If not completed by the due date access will be revoked

Getting Started



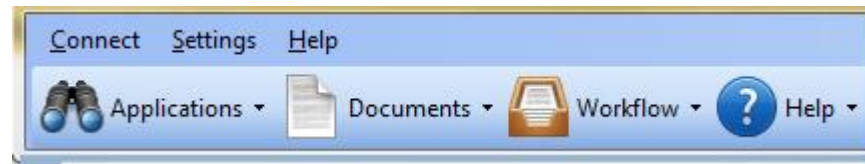
Logging In:

- Requires IDM user name and password



Getting Started

Toolbars & Icons














We'll touch on Five toolbars within PC

- File ▶
- View ▶
- Annotations ▶
- Workflow ▶
- Navigate ▶

Getting Started

File Toolbar











| | | | |
|---|---|-------------------------------|--------|
| ✓ |  | Save | |
| ✓ |  | Email | Ctrl+M |
| ✓ |  | Fax | |
| ✓ |  | Export | |
| ✓ |  | Print | Ctrl+P |
| ✓ |  | User | Ctrl+U |
| ✓ |  | Launch associated application | |
| ✓ |  | Properties | |
| ✓ |  | Copy Document | Ctrl+Y |
| ✓ |  | Apply retention hold | |
| ✓ |  | Process approval requests | |

Getting Started

View Toolbar


















| | | |
|---|-------------------------------|------------------|
|  | Zoom In | Ctrl+Num + |
|  | Zoom Out | Ctrl+Num - |
|  | Rotate 90° Left | Alt+ Left Arrow |
|  | Rotate 90° Right | Alt+ Right Arrow |
|  | Save Image Rotation to Server | |
|  | Fit Window | F2 |
|  | Fit Width | F3 |
|  | Fit Height | F4 |
| | Zoom Regions | |

Getting Started

Annotations Toolbar









- ✓  Show/Hide Annotations
- ✓  Navigate Page
- ✓  Select Annotation
- ✓  Digital Signature
- ✓  Stamp
- ✓  Sticky Note
- ✓  Text
- ✓  Highlight
- ✓  Check
- ✓  Line
- ✓  Arrow
- ✓  Rectangle
- ✓  Oval
- ✓  URL
- ✓  Redact

Getting Started

Navigate Toolbar
















- ✓  Previous Document
- ✓  First Ctrl+Home
- ✓  Previous Page Ctrl+Page Up
- ✓ Go To Page Selector Ctrl+G
- ✓  Next Page Ctrl+Page Down
- ✓  Last Ctrl+End
- ✓  Next Document

Getting Started

Workflow Toolbar

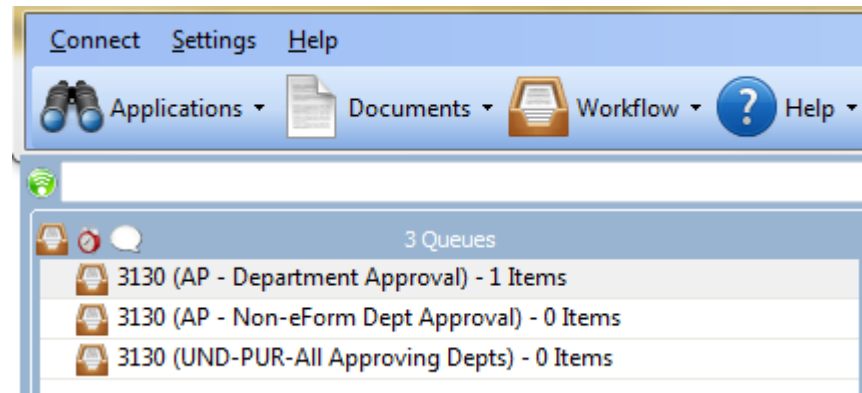


- ✓  View Next Item Ctrl+N
- ✓  Relink
- ✓  Route Up
- ✓  Route Back
- ✓  Route Forward
- ✓  Route Anywhere
- ✓  Recall Last Workflow Item
- ✓  Mark Item as On Hold
- ✓  Mark Item as Pending
- ✓  Archive
- ✓  Remove from Workflow
- ✓  View Workflow History
- ✓  View Recently Routed Items

Helpful Tools

Message Center

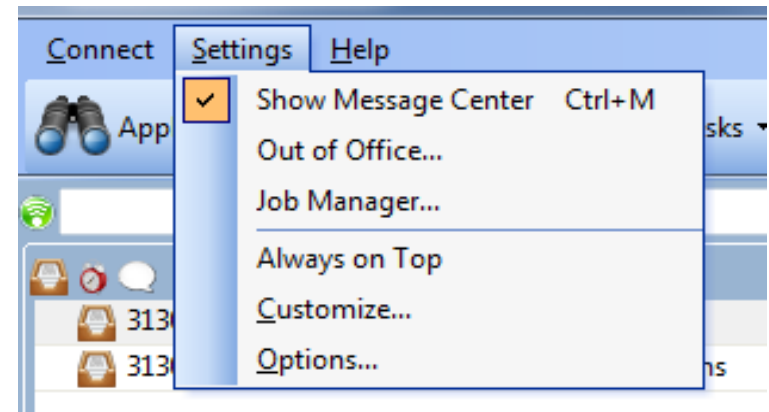
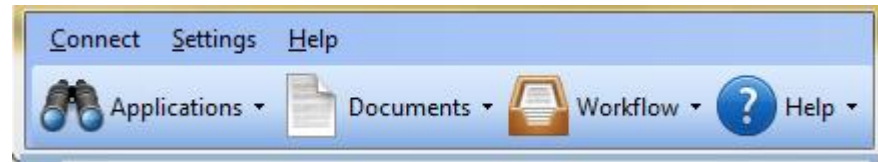
- Provides overview of outstanding items in your workflow



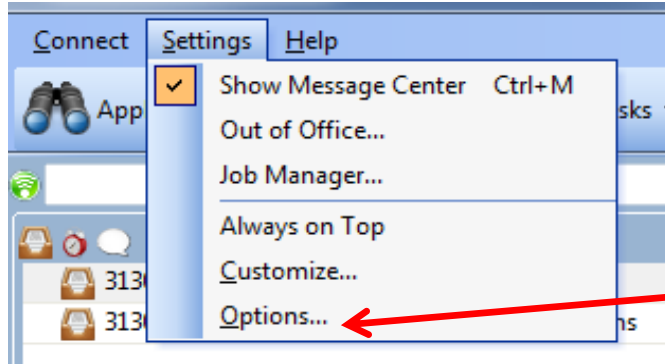
Helpful Tools

To enable the message center

- Select Settings
- Click on “Show Message Center” or use Control M

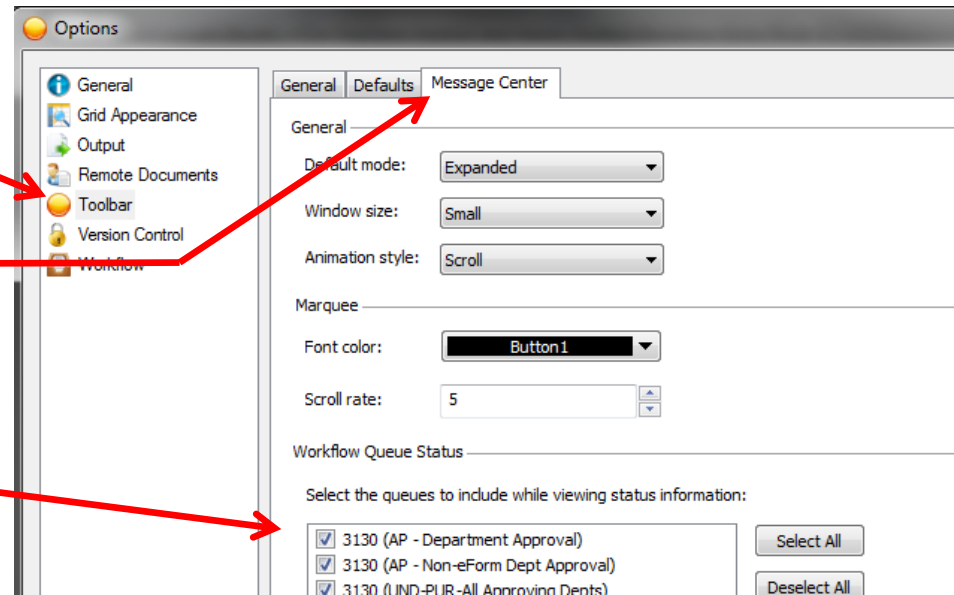


Helpful Tools



- To select the queues to view in the message center
- Click Settings
- Select Options

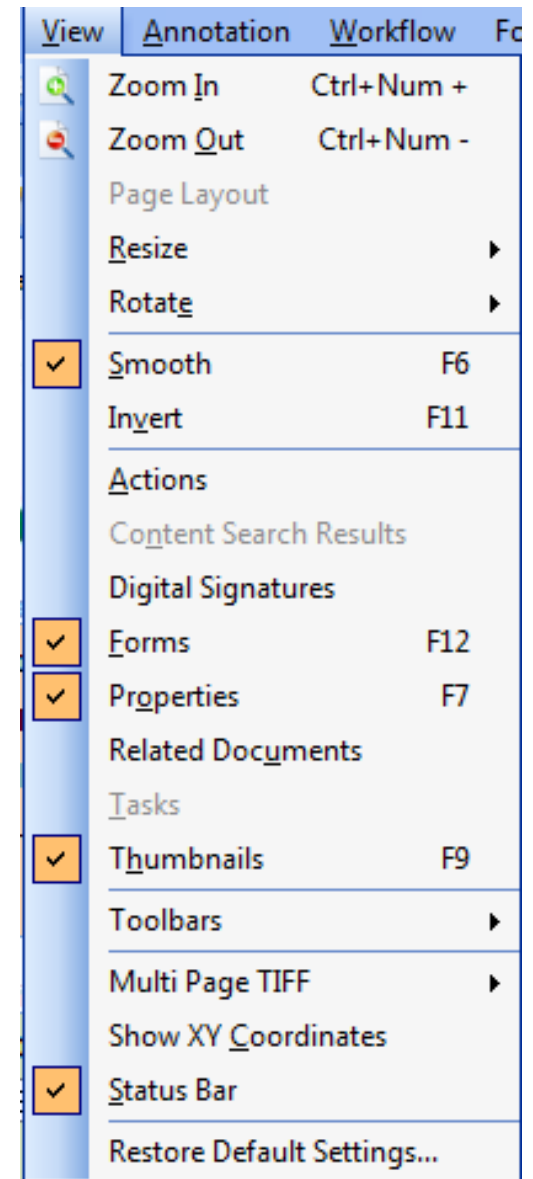
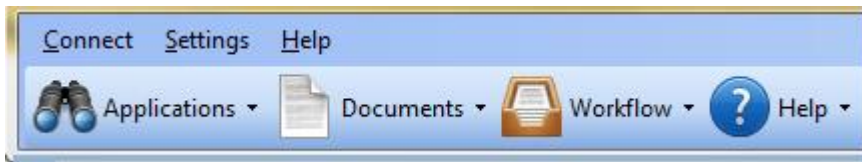
- Click Toolbar
- Select Message Center Tab
- Select Queues and click apply



Helpful Tools

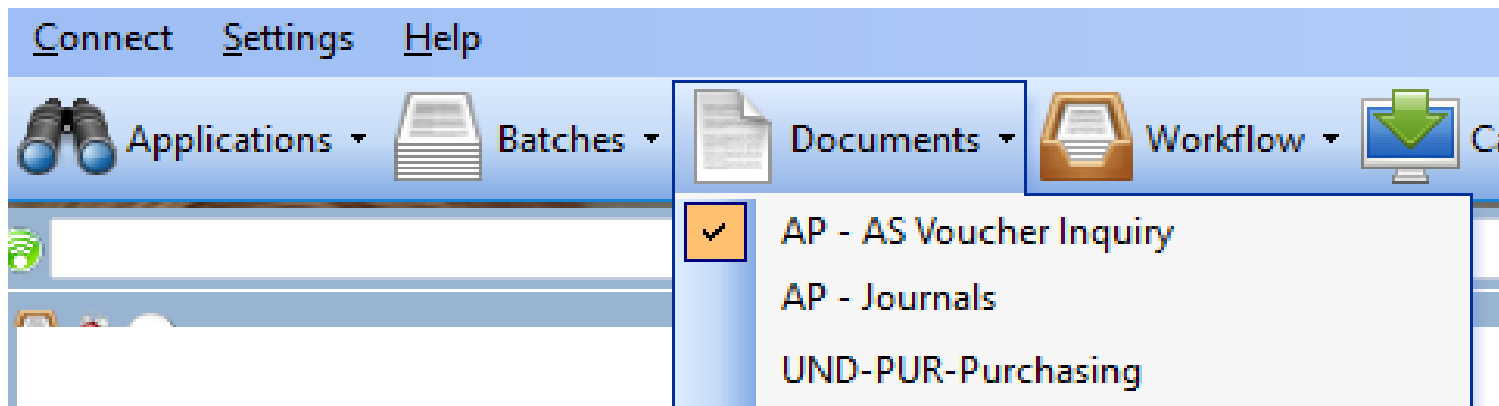
Hot keys available in Perceptive Content

- Forms (F12)
 - Brings up eForm
- Properties (F7)
 - Shows index fields & custom properties
- Thumbnails (F9)
 - Small page images




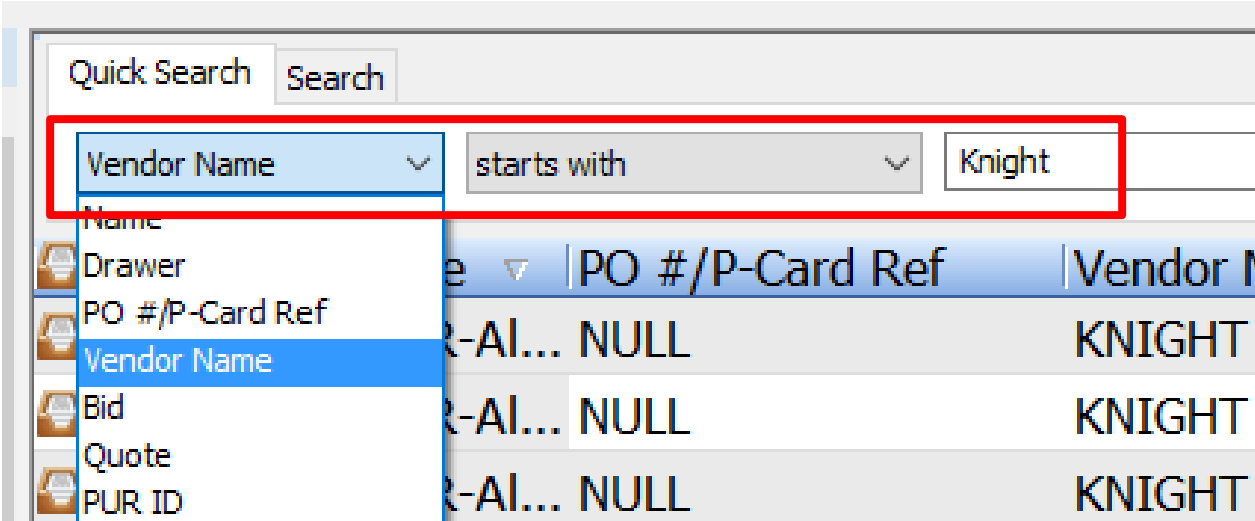
Find a Document

- Within the Perceptive toolbar, select the down-arrow beside Documents and select appropriate drawer/view



Find a Document

- Click on the down arrow to select the appropriate search criteria, enter the information and click 



The screenshot shows a search interface with a "Quick Search" section. A dropdown menu is open, showing search criteria options: Name, Drawer, PO #/P-Card Ref, Vendor Name, Bid, Quote, and PUR ID. The "Vendor Name" option is selected. The search criteria is set to "starts with" and the search term is "Knight". Below the search criteria, a table displays search results.

| Name | PO #/P-Card Ref | Vendor Name |
|---------|-----------------|-------------|
| R-AI... | NULL | KNIGHT |
| R-AI... | NULL | KNIGHT |
| R-AI... | NULL | KNIGHT |

Find a Document

- The Workflow Queue will provide the location of the document.

Quick Search Search

Vendor Name starts with Knight

| Workflow Queue | PO #/P-Card Ref | Vendor Name | Bid | Quote | PUR ID |
|----------------------|-----------------|-----------------|-----|-------|---------------|
| 8260 (UND-PUR-AI...) | NULL | KNIGHT PRINTING | | | 1001000000325 |
| 5260 (UND-PUR-AI...) | NULL | KNIGHT PRINTING | | | 1001000000445 |
| 3250 (UND-PUR-AI...) | NULL | KNIGHT PRINTING | | | 1001000000280 |

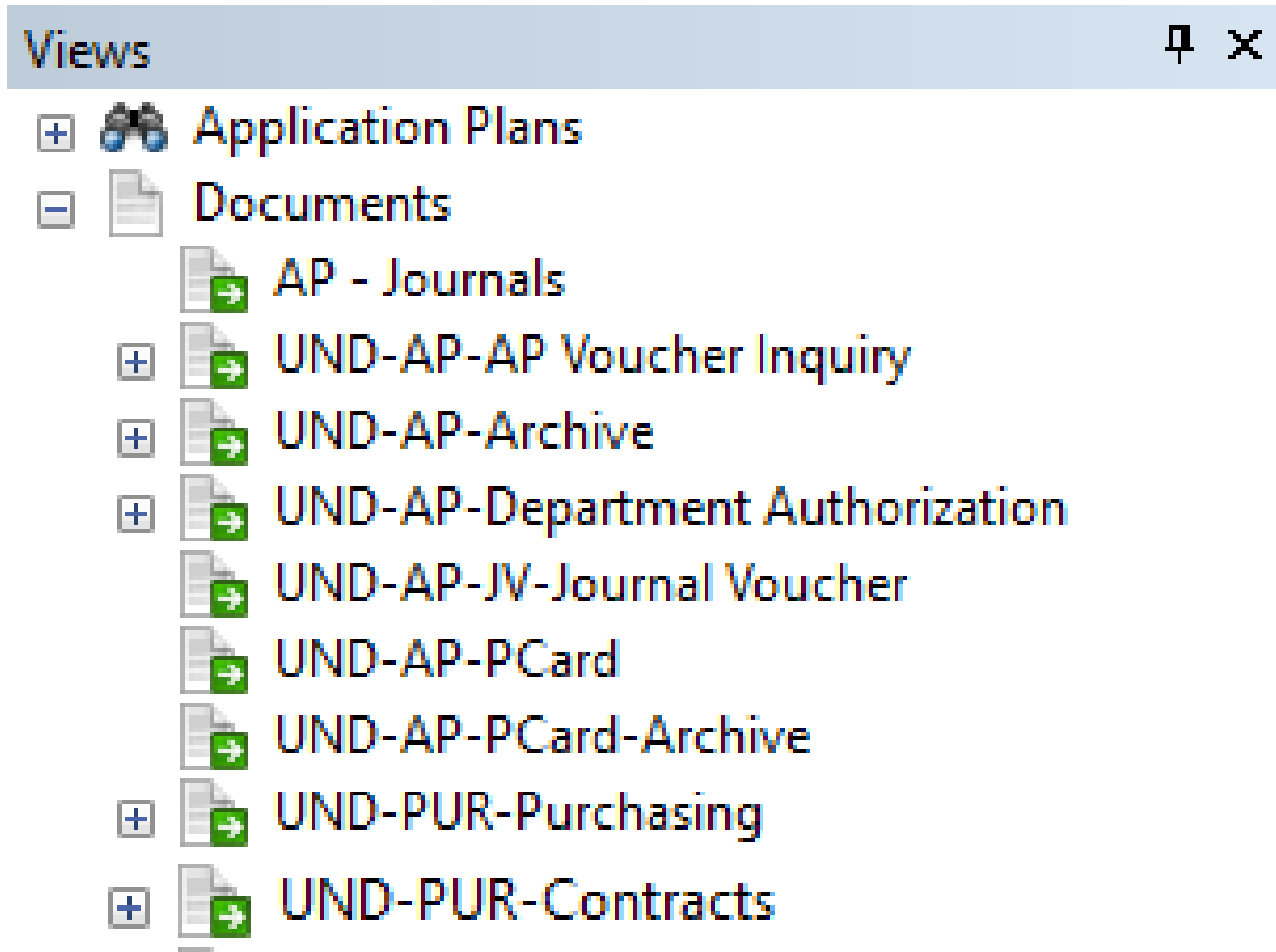
- Double click the line to open and view the selected document.

Quick Search Search

Vendor Name starts with Knight Go

| Workflow Queue | PO #/P-Card Ref | Vendor Name | Bid | Quote | PUR ID | Type | UND-PUR-Dept # | UNI |
|----------------------|-----------------|-----------------|-----|-------|----------------|------------------------------|----------------|------|
| 8260 (UND-PUR-AI...) | NULL | KNIGHT PRINTING | | | 10010000003253 | UND-PUR-Purchase Requisition | 8260 | \$ 2 |
| 5260 (UND-PUR-AI...) | NULL | KNIGHT PRINTING | | | 10010000004451 | UND-PUR-Purchase Requisition | 5260 | \$ 2 |
| 3250 (UND-PUR-AI...) | NULL | KNIGHT PRINTING | | | 10010000002805 | UND-PUR-Purchase Requisition | 7127 | \$ 2 |

PPS documents to search



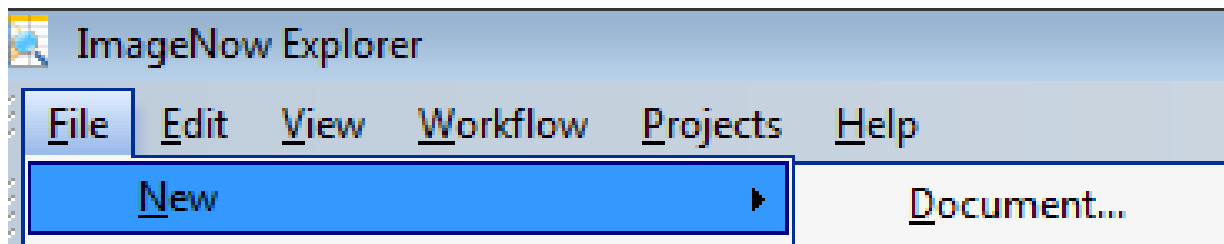
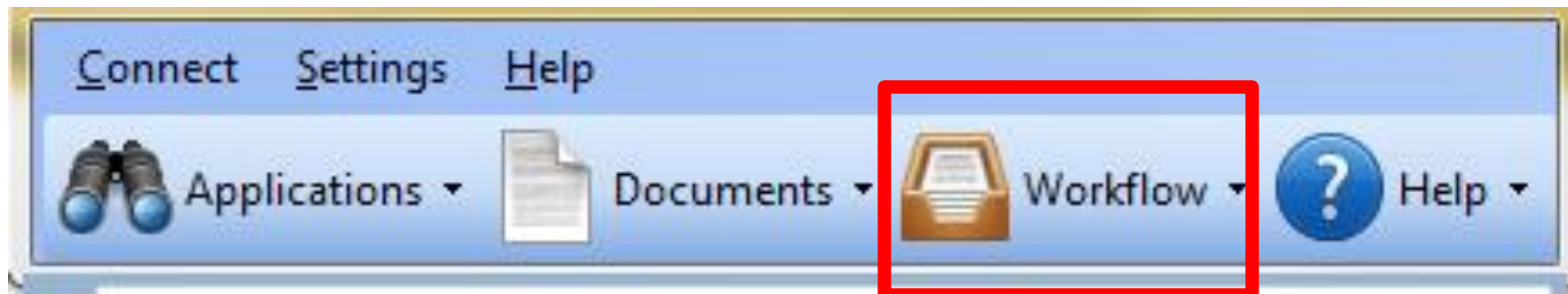
Purchase Requisition in Perceptive

- Instruction manual found on our website
 - under Procurement – [Purchase Requisitions](#)

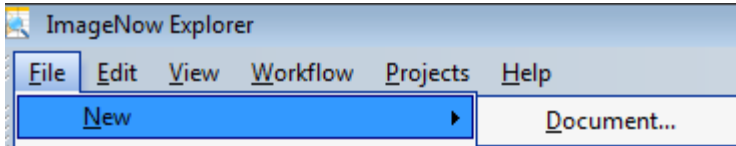
| Home | About | Procurement | Payment | P-Card | Asset Mgmt | T & |
|----------------------------------|-------|-------------------------------|---------|---|------------|---------------------------|
| Contracts | | Bids/Quotes/RFP | | Purchase Orders & Requisitions | | Printing/Furniture |
| Cooperative Contracts | | Alternate Procurement Request | | Changes / Cancellation / Closed | | Printing Procedures |
| Services Template | | Bid Request Form | | Federal Funds/SAM | | Printing Vendors |
| Consultant Template | | Quotation Template | | Purchase Requisitions | | Furniture Purchases |
| Guest Speaker Template | | Request for Proposals (RFPs) | | Terms & Conditions | | Furniture Vendors |
| Contract Signature Authorization | | RFP Evaluator Guide | | | | |

Purchase Requisition in Perceptive

Select Workflow



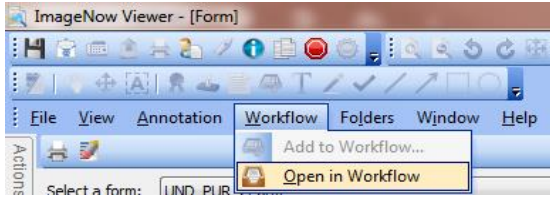
Purchase Requisition in Perceptive



- Select File > New > Document
- The application Plan should be PUR – Purchase Requisition
- Click the gold key icon to populate PUR ID Number
- THE PUR ID # is NOT a valid PO#
- Verify 'Send to workflow queue' is checked
- Workflow queue should be UND-PUR Requisition Request
- DO NOT FILL out any additional information under Document Keys or Custom Properties

A screenshot of the 'New Document' dialog box in Perceptive software. The 'Application Plan' dropdown is set to 'UND-PUR-Purchase Requisition'. A gold key icon is visible next to it. The 'Location' section shows 'Drawer' as 'UND-PUR-Purchasing'. The 'Properties' section has 'PUR ID' set to '10010000001755'. The 'Type' dropdown is also set to 'UND-PUR-Purchase Requisition'. In the 'Custom Properties' table, the 'UND-PUR-Fiscal Year' column is highlighted. On the right side, the 'Send to workflow queue' checkbox is checked, and the 'UND-PUR-Requisition Request' dropdown is selected. A black callout box points to the 'Send to workflow queue' checkbox with the text 'Make sure check-box is selected to process correctly'. Another black callout box points to the 'UND-PUR-Requisition Request' dropdown with the text 'Select to auto-fill indexes'. The 'OK' and 'Cancel' buttons are at the bottom right.

Purchase Requisition in Perceptive



Click on workflow in the menu bar and select 'Open in Workflow' to complete the form. This enables Routing.

General Information

1. **Headings in RED are required**
2. If you receive an error upon submission, close and reopen the form.
3. Once the form is reopened, to locate your error, review the Note section within the Properties Toolbar for instructions.
4. Update fields as needed and resubmit.

Required for purchases > or = \$25,000 using Federal Funds:

Vendor DUNS No. Vendor is registered in Sam www.sam.gov

- Vendor is not excluded (debarred) www.sam.gov
- Completed Budget Check / Validated funds

Department needs to verify information in sam.gov and PeopleSoft.

Delivery date is a required field.
Delivery Date

Requestor Information

| | | |
|--|---|---|
| Dept Name <input type="text" value="Purchasing"/> | Dept # <input type="text" value="3125"/> | Dept Contact <input type="text" value="Vicki Von Harz"/> |
| Dept Phone # <input type="text" value="777-2682"/> | | |
| Ship to Address <input type="text" value="264 Centennial Drive"/> | Ship to Address 2 <input type="text"/> | STOP # <input type="text" value="8381"/> |
| City <input type="text" value="Grand Forks"/> | State <input type="text" value="ND"/> | Zip <input type="text" value="58202"/> |

Vendor Information

Select magnifying glass to populate vendor information.

| | | |
|--|--|---|
| Vendor ID <input type="text"/> | Name <input type="text" value="Knight Printing"/> | Address <input type="text" value="3401 Fiechtner Dr"/> |
| Address 2 <input type="text" value="PO Box 7100"/> | City <input type="text" value="Fargo"/> | |
| State <input type="text" value="ND"/> | Zip <input type="text" value="58106"/> | Phone # <input type="text"/> |
| Contact Name <input type="text" value="Jeff Anderson"/> | Contact Email <input type="text"/> | |

Purchase Requisition in Perceptive

| Item Description | | | | | | |
|--|-----|----------------------------------|------------|---------|---------|--|
| Line # | Qty | Description and Business Purpose | Unit Price | Total | | |
| - 1 | 20 | Things | 50.00 | 1000.00 | | |
| - 2 | 1 | 500 #10 non window envelopes | 125.00 | 125.00 | | |
| - 3 | 1 | Printer | 5500.00 | 5500.00 | | |
| Line items need to be in numerical sequence. | | | | Total: | 6625.00 | |

| Funding Information | | | | | | | |
|---|---------|-------|--------|---------|---------|---------|---------|
| Line# | Account | Fund | Dept # | Project | Program | Amount | |
| - 1 | 535045 | 31400 | 3125 | | | 1000.00 | |
| - 2 | 542025 | 31400 | 3125 | | | 125.00 | |
| - 3 | 691035 | 31400 | 3125 | | | 5500.00 | |
| Funding for each line # must equal the dollar amount for the line # in the description and must be in numerical sequence. | | | | | | Total: | 6625.00 |

| UND Bid/Quote | | Order Placement Instructions <small>(One option must be selected)</small> | |
|--|---------|--|--|
| Bid # | Quote # | <input type="checkbox"/> Department will contact vendor with purchase order | |
| <input type="checkbox"/> Alternate Procurement Request <small>(Remember to attach the forms)</small> | | <input type="checkbox"/> Purchasing to email vendor purchase order (contact email address) | |
| Must select an option prior to submitting | | <input checked="" type="checkbox"/> Purchasing will place order on P-Card | |
| | | <input type="checkbox"/> Ship Order Complete | |
| | | <input type="checkbox"/> Send all copies to Grants and Contracts | |

| Major Equipment Purchase | | | | | | |
|---|------------------|-------------------|--------|--|-------------------------|--|
| <input checked="" type="checkbox"/> Single Capitalized Item <input type="checkbox"/> Multiple Capitalized Items (complete a line for every tagged item) | | | | | | |
| Line# | Item Description | Building Location | Room # | Item Use (Research, instructional, etc.) | Dept Asset Mgmt Contact | |
| - 3 | Printer | Twamley Hall | 114 | Instructional | Vicki Von Harz | |

For equipment being funded by accounts between 691000-699999, complete the Major Equipment Purchase section following these instructions:

- 1a. Select Single Capitalized Item if the purchased item should be given one major equipment tag.
- 1b. Select Multiple Capitalized Items if the purchase includes several items that should be given separate major equipment tags.
2. Enter an Item Description that will easily identify the item(s) for inventory purpose; this description will be used when the item(s) are added into the PeopleSoft Asset Management System.
3. Enter the Building where the item will be located.
4. Enter the Room # where the item will be located.
5. Enter the Item Use. For example, is it being used for instructional purposes, research or office equipment etc.
6. Provide the name of the person to contact should Asset Management have any questions in regards to the Major Equipment Purchase.

Purchase Requisition in Perceptive

SUBMIT REQUEST

- Once completed, from the Workflow Toolbar, select Route Forward. This will automatically route to the first department listed under the funding information.



- If more than one department is funding the purchase, please list the funding information of the requestor first as it will auto route to your department for your approval and then you can route to the next department.

Purchase Requisition in Perceptive

- Approval Page will show all approval stamps & Comments on a sticky note

AP - G&C APPROVED
LISA.MOORE
02/10/17

UND-PUR-APPROVED
JOYCE.RICE
02/09/17
3:47:01 PM

UND-PUR-APPROVED
STEPHEN.RELLER
02/09/17
3:59:55 PM

UND-PUR-APPROVED
ANNA.LEDDIGE
02/10/17
10:22:57 AM

TY-APPROVED
.GOSSELIN
10/17
8:10 AM

Approval Stamps

Sticky Note

Enter Text:

Add

History:

joyce.rice - 2/9/2017
RADIOCHEMICAL: Please forward to Safety & Purchasing.

Print

Close

Purchase Requisition in Perceptive

- Purchase Order is created within PeopleSoft
- Purchase Order Number is added to Document Keys
- Signed Purchase Order is attached
- Purchase Requisition routed to complete. eForm is converted to a tiff.

Properties

Document Keys

Drawer: UND-PUR-Purchasing

Name: 321Z129_WT734HS8F002RPG

PO #/P-Card Ref: 0000014256

Vendor Name: VITRAX

Bid:

Quote: E8-020217

PUR ID: 10010000004515

Type: UND-PUR-Purchase Requisition

Custom Properties

| | |
|----------------------|------------|
| UND-PUR-Fiscal Year | 2017 |
| UND-PUR-Amount | \$ 750.00 |
| UND-PUR-Vendor ID | 0000171670 |
| UND-PUR-Dept # | 8015 |
| UND-PUR-Funding Dept | 8015 |
| UND-PUR-Status | Approved |
| UND-PUR-Order Type | |

Notes

Content Viewer - [Page 3]

Annotation Workflow Folders Window Help

Purchase Order

University of North Dakota
264 CENTENNIAL DRIVE STOP 8356
GRAND FORKS ND 58202-8356
United States

Supplier: 0000171670
VITRAX
660 S JEFFERSON ST STE E
PLACENTIA CA 92870-6652

Dispatch via Print

| Purchase Order | Date | Revision | Page |
|------------------|------------|----------|------|
| UND01-0000014256 | 02/10/2017 | | 1 |

| Payment Terms | Freight Terms | Ship Via |
|---------------|-----------------------|----------|
| 30 PO | FOB DEST, FRT PREPAID | Common |

| Buyer | Phone | Currency |
|---------------------|--------------|----------|
| *McGarry, Janelle M | 701/777-2681 | USD |

Ship To: 9061
Biomedical Sciences
1301 N Columbia Rd
Stop 9037
Grand Forks ND 58202-9037
United States

Attention: Not Specified

Bill To: UND ACCOUNTS PAYABLE
TWAMLEY HALL ROOM 115
264 CENTENNIAL DRIVE STOP 8356
GRAND FORKS ND 58202-8356
United States

Tax Exempt? Y Tax Exempt ID: E-2001 Replenishment Option: Standard

| Line-Sch | Item/Description | Mfg ID | Quantity | UOM | PO Price | Extended Amt | Due Date |
|----------|---|--------|----------|-----|----------|--------------|------------|
| 1-1 | Catalog #VT128. Dopamine, [phenyl-2,5,6-3H] 1mCi | | 1.00 | EA | 750.00 | 750.00 | 02/13/2017 |

Accounts Payable Workflow

- Submit invoice & supporting documents via email to:

APInvoice@UND.edu

- Include either Ref/PO number or PeopleSoft purchase order number with the invoice

Accounts Payable Workflow

- Invoice will be routed to your departmental approval queue



3130 (AP - Department Approval)





3130 (AP - Non-eForm Dept Approval)

- Review for accuracy – vendor, amount, etc.

Accounts Payable Workflow

- Complete the eForm
- Update the description line
- Fill in the funding source(s) on the distribution lines
- Check for suspended vendors


University of North Dakota


Payment Request eForm

Header Info

| | | | | | |
|-----------|-------------------|---|-----|----------------|------------|
| Vendor Id | 0000000622 | Vendor Location | FMS | Department # | 3130 |
| Name | LASER SYSTEMS | Fed Tax Id # | | Reference/PO # | 3130 456 |
| Address | 901 WESTRAC DRIVE | SSN # | | Invoice # | eileen21 |
| Address 2 | null | *Last four digits of Social Security Number only! | | Invoice Date | 03/07/2014 |
| City | FARGO | State | ND | Zip | 58103 |
| | | | | Voucher # | 00151560 |

Description

| | Description | Amount |
|---|---------------|--------|
| - | tessting | 500.00 |
| + | Total: | 500.00 |

Distribution Lines

| | With-holding | Account | Fund | Dept. | Program | Project | Amount |
|---|--------------|---------------|------|-------|---------|---------|---------|
| - | v | | | | | | |
| - | v | | | | | | 1325.89 |
| - | v | | | | | | 1325.89 |
| - | v | | | | | | |
| - | v | | | | | | |
| + | | Total: | | | | | 2651.78 |

The *Distribution Lines*, *Special Instructions*, and *Additional Information* should be completed by the department requesting payment.

Special Instructions

Hold Payment Call

Payment Needed By

Payment By Check, Not Direct Deposit

Separate Check

Notes

Additional Instructions

Must be checked before payment can be issued

Vendor is not EXCLUDED(DEBARRED)

(Complete only for Non-employee travel)

North Dakota State Employee (excluding UND employees)

Yes [Clear](#)

No

Accounts Payable Workflow

- Complete the eForm (con't)
 - Mark and/or note any special instructions
 - Stamp your approval on the invoice



- Route forward to:

- Manual**
 - AP - Audit Approval Route
 - AP - Department Approval Route
 - AP - Invoice Denial

AP – Reminders

- eForm – loads into PeopleSoft vs. Properties – Search Fields within Perceptive Content
 - Changes on one need to be reflected on the other
 - Do NOT change the vendor – send to dept 3130 with a sticky note
 - Invoice details, properties, eForm should match
- Please do not use stationary/theme backgrounds or icons for social media in your invoice email submissions
- Email invoices to: APinvoice@UND.edu
 - Do NOT email or attach W-9s to this email address
- Email all other documents to:

UND.pps@UND.edu

AP – Reminders

- When submitting your invoice for payment, put the Ref/PO# on the **TOP** of the invoice/payment request (just a PO# for purchase order invoices)
- Priority will not be flagged if “Payment Needed By” is the current day’s date – please call PPS (777-2771)
- Scan only **ONE** invoice per email
- Lists of invoices in workflow or documents can be exported to excel
- No longer process reimbursements to employees through PC

AP – Reminders

- Remove/redact personal information
 - Show only last four digits of SSN
 - Show only last four digits of credit card number
 - Redact birthdate on passports, etc.
 - Remove names or procedure from medical type payments/reimbursements
- All payments must have a documented business purpose
- Check your Non-eForm Queue (Purchase order invoices)
- Verify the vendor on the eForm is correct (Do **NOT** change the vendor)
- Stamp your approval in a “white” space

AP – Reminders

- When processing a payment being funded by a Foundation flow through fund (26XXX)
 - 26XXX fund is in the distribution lines
 - Foundation fund (issued by the UND Foundation) is in the first five digits of the description line
 - Add to sticky note within the Preq

City [] State [] Zip [] Vendor # []

Description

| Description | Amount |
|------------------------------|--------|
| - 11111-Supplies for project | 527.00 |
| Total: 527.00 | |

Distribution Lines

The *Distribution Lines*, *Special Instructions*, and *Additional Information* should be completed by the department requesting payment.

| With-holding | Account | Fund | Dept. | Program | Project | Amount |
|--------------|---------|-------|-------|---------|---------|--------|
| - | 535045 | 26111 | 3130 | | | 527.00 |
| Total: | | | | | | 527.00 |

Special Instructions

Additional Instructions
Must be checked before payment can be issued

AP – Reminders

- Wire Transfers
 - Subject line of email should contain “wire”
 - Note “wire transfer” in the special instructions of the eForm

The screenshot shows the University of North Dakota Payment Request eForm. The form includes sections for Vendor Info, Description, Distribution Lines, and Special Instructions. A callout box titled "Special Instructions" is overlaid on the right side of the form, highlighting the "Special Instructions" section. The callout box contains the following options:

- Hold Payment
- Payment Needed By
- Payment By Check, Not Direct Deposit
- Separate Check

Below these options is a "Notes" section with a text area containing the text "Wire Transfer".

Special Instructions

Hold Payment Call

Payment Needed By

Payment By Check, Not Direct Deposit

Separate Check

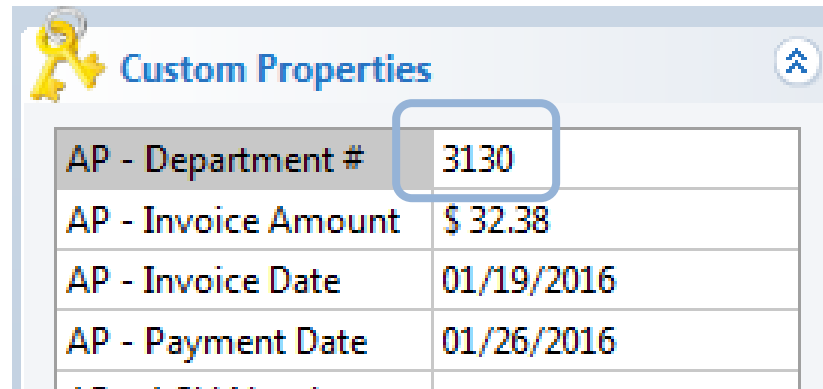
Notes

Wire Transfer

- Wire transfer form must be attached to the payment request

AP - Reminders

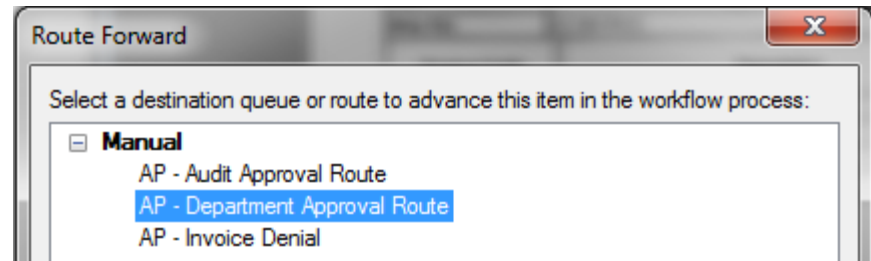
- Route to another department
 - Enter the new department number



A screenshot of a 'Custom Properties' dialog box. The title bar includes a yellow key icon and the text 'Custom Properties'. Below the title bar is a table with four rows. The first row is 'AP - Department #' with the value '3130' in a text box that is circled in blue. The second row is 'AP - Invoice Amount' with the value '\$ 32.38'. The third row is 'AP - Invoice Date' with the value '01/19/2016'. The fourth row is 'AP - Payment Date' with the value '01/26/2016'.

| | |
|---------------------|------------|
| AP - Department # | 3130 |
| AP - Invoice Amount | \$ 32.38 |
| AP - Invoice Date | 01/19/2016 |
| AP - Payment Date | 01/26/2016 |

- Route forward to:
 - AP - Department Approval Route



A screenshot of a 'Route Forward' dialog box. The title bar has the text 'Route Forward' and a close button. The main area contains the text 'Select a destination queue or route to advance this item in the workflow process:'. Below this is a list of options under a 'Manual' heading. The option 'AP - Department Approval Route' is highlighted with a blue background.

Select a destination queue or route to advance this item in the workflow process:

- Manual
 - AP - Audit Approval Route
 - AP - Department Approval Route
 - AP - Invoice Denial

AP - Reminders

- Instructions to Procurement & Payment Services regarding your document
 - Use sticky note
 - **ALSO**
 - Route to department 3130 via Department Approval Route
- Use the notes section of the eForm
 - Attachments to check

UND University of North Dakota
Payment Request eForm

Header Info

| | | | | | |
|-----------|-------------------|---|-----|----------------|------------|
| Vendor Id | 000000622 | Vendor Location | FMS | Department # | 3130 |
| Name | LASER SYSTEMS | Fed Tax Id # | | Reference/PO # | 3130 456 |
| Address | 901 WESTRAC DRIVE | SSN # | | Invoice # | eleen21 |
| Address 2 | null | *Last four digits of Social Security Number only! | | Invoice Date | 03/07/2014 |
| City | FARGO | State | ND | Zip | 58103 |
| | | | | Voucher # | 00151560 |

Description

| Description | Amount |
|-------------|--------|
| tessting | |
| Total: | |

Distribution Lines

| With-holding | Account | Fund | Dept. | Program | Project | Amount |
|--------------|---------|------|-------|---------|---------|--------|
| | | | | | | 13 |
| | | | | | | 13 |
| | | | | | | |
| | | | | | | |
| | | | | | | 20 |

The Distribution Lines, Special Instructions and Additional Information should be completed by the department requesting payment.

Special Instructions

Hold Payment Call

Payment Needed By

Payment By Check, Not Direct Deposit

Separate Check

Notes

Additional Instructions

Must be checked before payment can be issued

Vendor is not EXCLUDED(DEBARRED)

(Complete only for Non-employee travel)

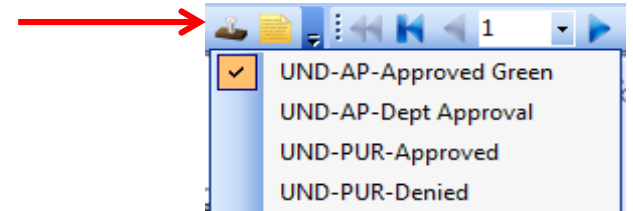
North Dakota State Employee (excluding UND emp)

Yes [Clear](#)

No

General Reminders

- Multiple Stamps may be available
 - Right click on your stamp icon



- Email us if someone leaves your department so we remove access
- Email Melissa Mager and Anna Leddige to delete a document from AP or PUR
 - Email **must include** Invoice # or Ref/PO# for Accounts Payable
 - PUR ID for Purchasing

General Reminders

- Document your business purpose

| Line # | Qty | Description and Business Purpose | Unit Price | Total |
|--------|-----|----------------------------------|------------|---------|
| 1 | 20 | Things | 50.00 | 1000.00 |
| 2 | 1 | 500 #10 non window envelopes | 125.00 | 125.00 |

Payment/Purchase Order information should be able to stand on its own for audit by state or federal auditors

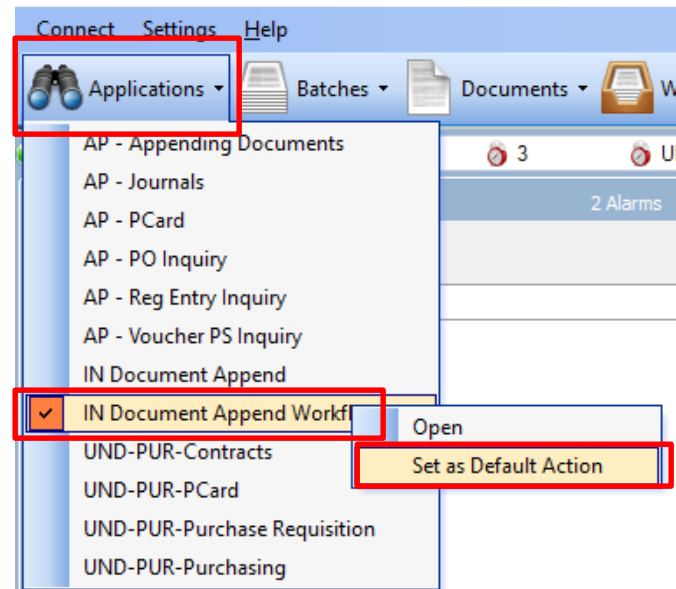
- Clarify your business purpose on your P Req

The diagram illustrates a collection of overlapping 'Description' boxes, each representing a line item in a purchase request. Each box contains a description and expand/collapse controls. The visible descriptions are: MERCH, REIMBURSE, MISC, FEE, SUPPLIES, and FOOD. The boxes are arranged in a way that suggests they are part of a larger, multi-line item description.

- Update/change the description line in AP or add sticky notes to document your business purpose

Appending to an existing Document

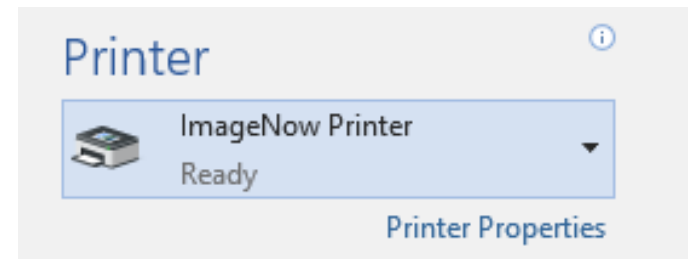
- The application within Perceptive must be set at click 'IN Document Append Workflow' to append within workflow.



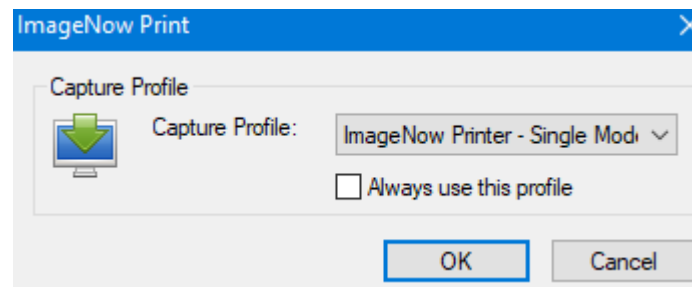
- You must have the document you want to attach TO in Perceptive open in your workflow

Appending to an existing Document

- Within the originating software, select print and print to the ImageNow Printer

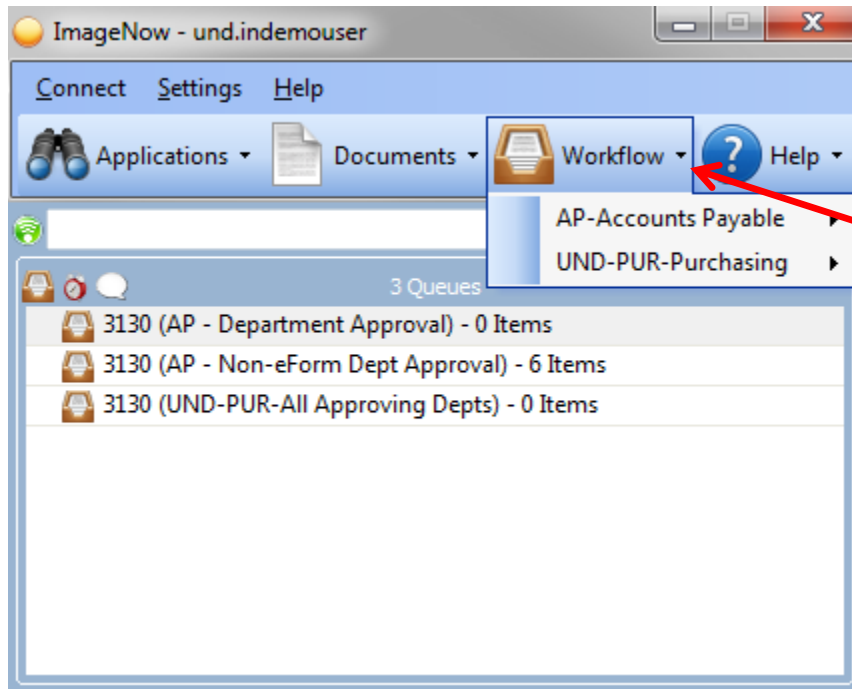


- Select the Single Mode capture profile and save

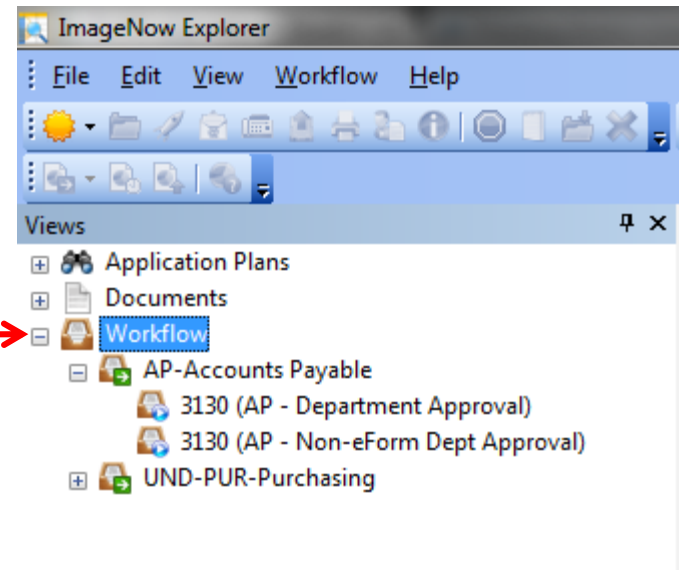


Tips & Tricks

- Multiple workflows may be available. i.e. Purchase Requisitions
- Click ▼ to show all workflows

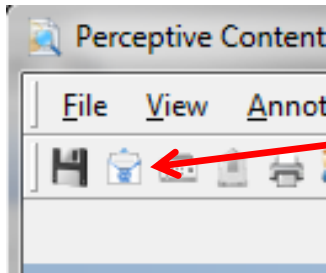


- Click the + to expand and show all workflows



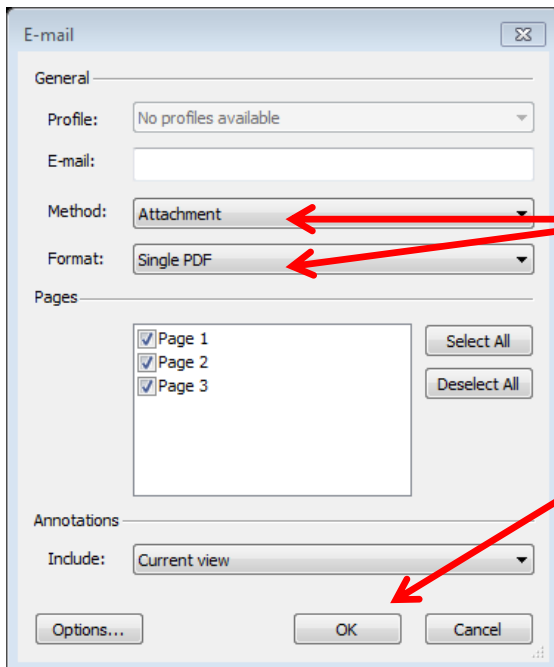
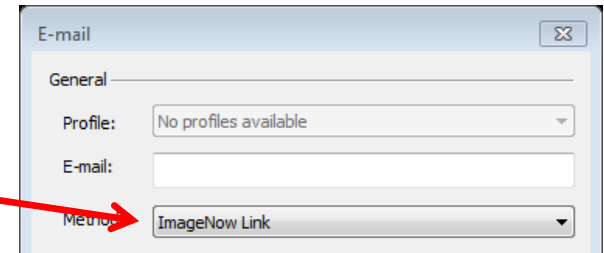
Tips & Tricks

- Email from Perceptive Content



- Select envelope icon on the toolbar
 - available in workflow or documents

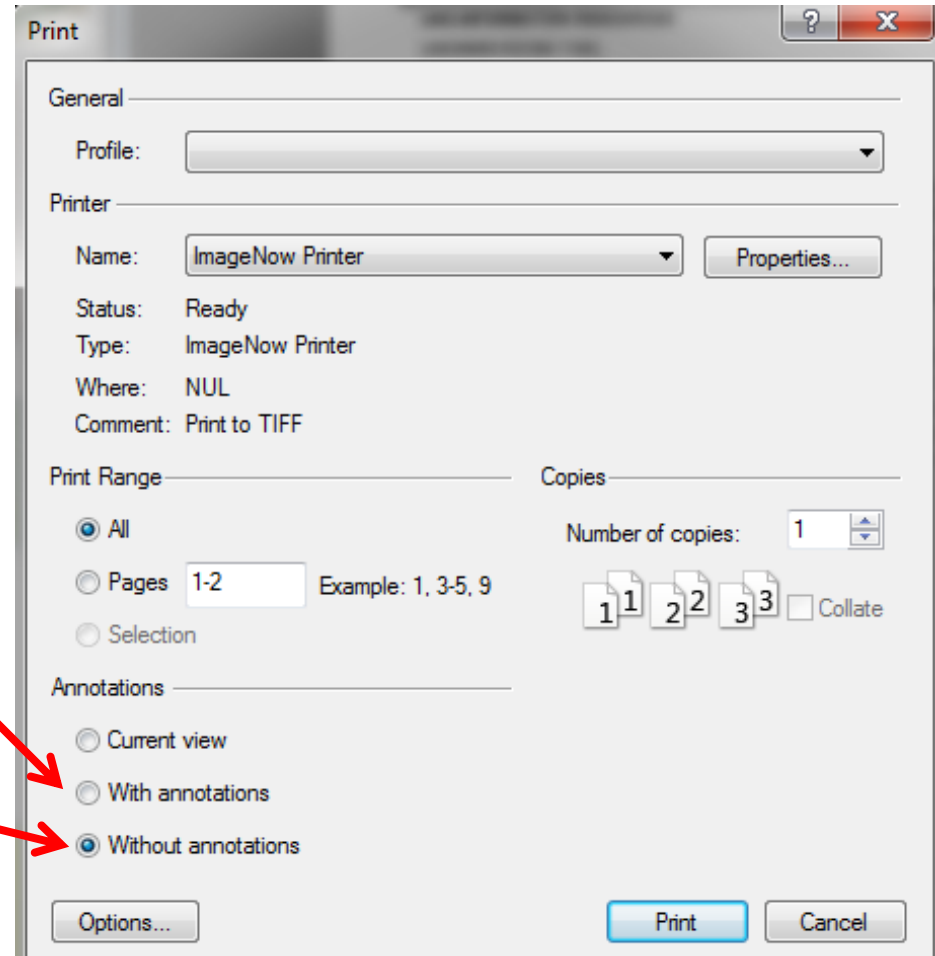
- On the E-mail screen, click the dropdown



- Select: Attachment and Single PDF
- Click OK
 - Processes through default email software

Tips & Tricks

- Print without stamps/annotations
- Select “with” to print invoice/document and stamps
- Select “without” to remove stamps on printed copy only



Tips & Tricks

- % is the Perceptive Content wildcard character.

%2459

ow Projects Help

AP - AS Voucher Inquiry

Quick Search Search

Invoice # starts with %2459 Go

Workflow Queue Drawer Invoice # Voucher

Enter search criteria.

- Results

Quick Search Search

Invoice # starts with %2459 Go


| Workflow Queue | Drawer | Invoice # | Voucher |
|----------------|----------------------|-------------------|---------|
| | AP - Accounts Pay... | 39024590 | 0002011 |
| | AP - Accounts Pay... | 52459792/52499... | 40394I |
| | AP - Accounts Pay... | 24590 | 40408Q |
| | AP - Accounts Pay... | 302459190 | 40720T |
| | AP - Accounts Pay... | 245904412 | F094535 |
| | AP - Accounts Pay... | 124590 | 40389I |
| | AP - Accounts Pay... | 1225762459 | DS04275 |
| | AP - Accounts Pay... | 15124502 | 5102120 |

Tips & Tricks

- “Lift” stamps/annotations
 - Removes for clean viewing



ref/po # 3130555

INVOICE 

THIS IS A TEST DOCUMENT TO BE USED FOR
IMAGENOW TRAINING.

Invoice #: Eileen Demo

Vendor: Laser Systems
Location: Remit A

**AP - G&C APPROVED
EILEEN.L.JOHNSON
04/09/14**

**AP - AUDIT APPROVED
EILEEN.L.JOHNSON
04/09/14**

**AP - DEPT APPROVED
EILEEN.L.JOHNSON
04/09/14**

ref/po # 3130555

INVOICE

THIS IS A TEST DOCUMENT TO BE USED FOR
IMAGENOW TRAINING.

Invoice #: Eileen Demo

Vendor: Laser Systems
Location: Remit A

AP - Tips & Tricks

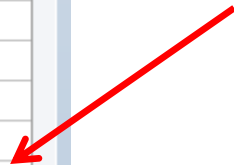
- Has this invoice been paid?????

| Workflow Queue | Invoice # |
|---------------------|-------------|
| 3130 COMP (AP - ... | eileen |
| 3130 COMP (AP - ... | Eileen Demc |
| 3130 COMP (AP - ... | 3130010913 |
| | 9005798431 |
| | 241521 |

- If the document resides in a workflow queue other than AP-Complete, it has NOT been paid.
- Check the custom properties . . .
- A paid document MUST have a number in either the **ACH**, **Check**, or **Wire** number field

| Custom Properties | |
|---------------------|------------|
| AP - Department # | 3130 comp |
| AP - Invoice Amount | \$ 500.00 |
| AP - Invoice Date | 09/19/2011 |
| AP - Payment Date | 09/26/2011 |
| AP - ACH Number | |
| AP - Check Number | |
| AP - Wire Number | |

Not Paid



Paid



| Custom Properties | |
|---------------------|------------|
| AP - Department # | 3130 |
| AP - Invoice Amount | \$ 42.50 |
| AP - Invoice Date | 06/12/2012 |
| AP - Payment Date | 06/14/2012 |
| AP - ACH Number | |
| AP - Check Number | 255419 |
| AP - Wire Number | |

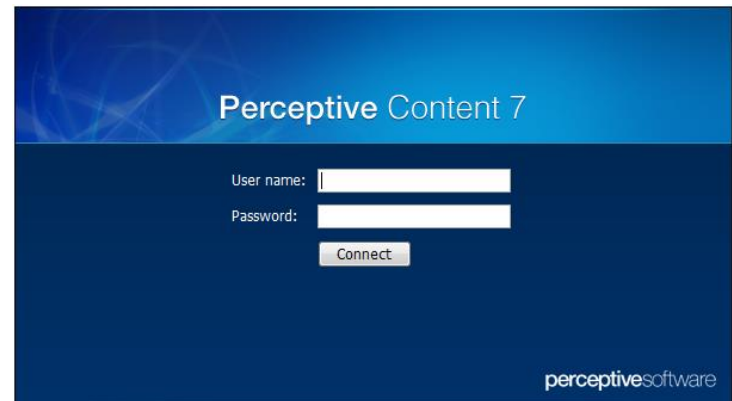
WebNow

URL for WebNow: <https://webdms.ndus.edu/webnow/>

WebNow System Requirements:

- *Users:* Users who view or process documents (no capturing capabilities are available)
- *Operating System:* Windows 7, 8.1, 10 (32 or 64 bit), Macintosh Intel 10.x +
- *Web Browser:*
 - Internet Explorer 10 or 11 for Windows
 - Apple Safari web browser for Macintosh

**PC sign in screen
for WebNow**



Perceptive Content 7

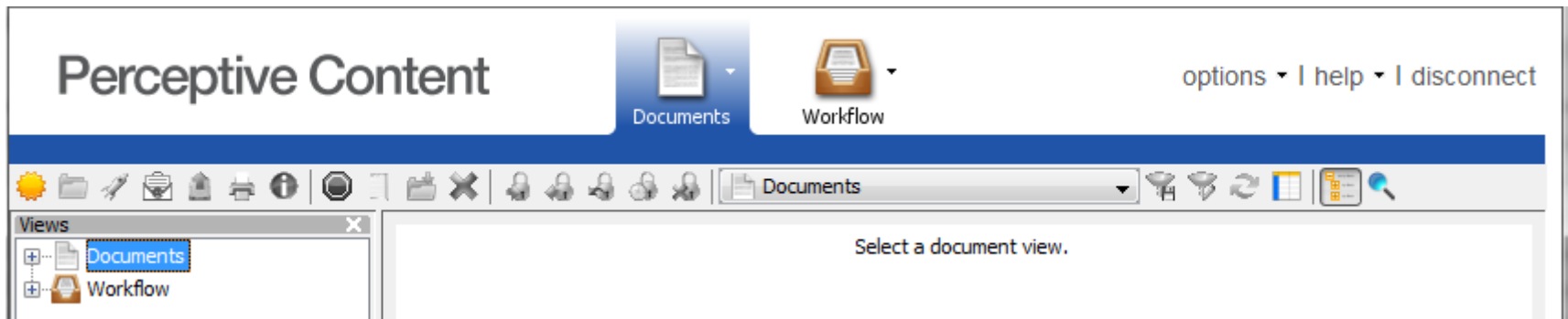
User name:

Password:

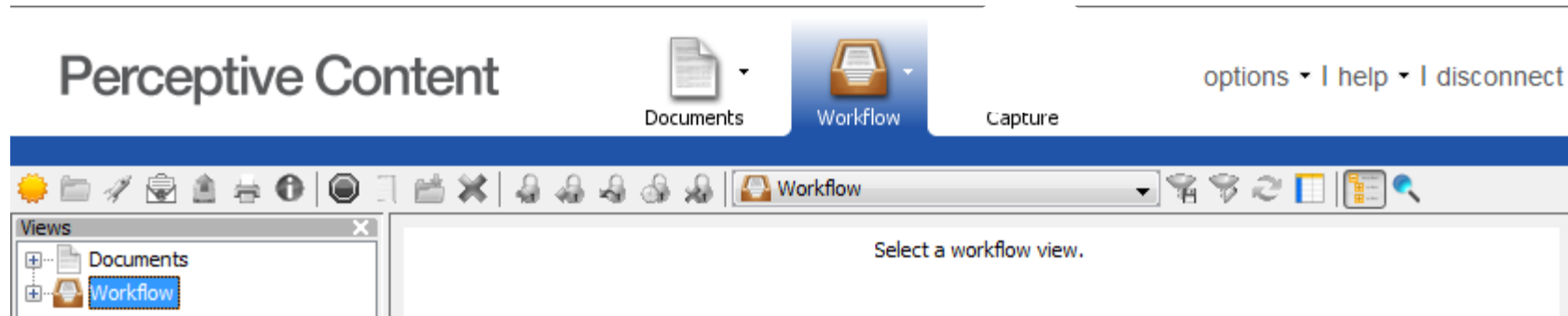
Connect

perceptive software

WebNow

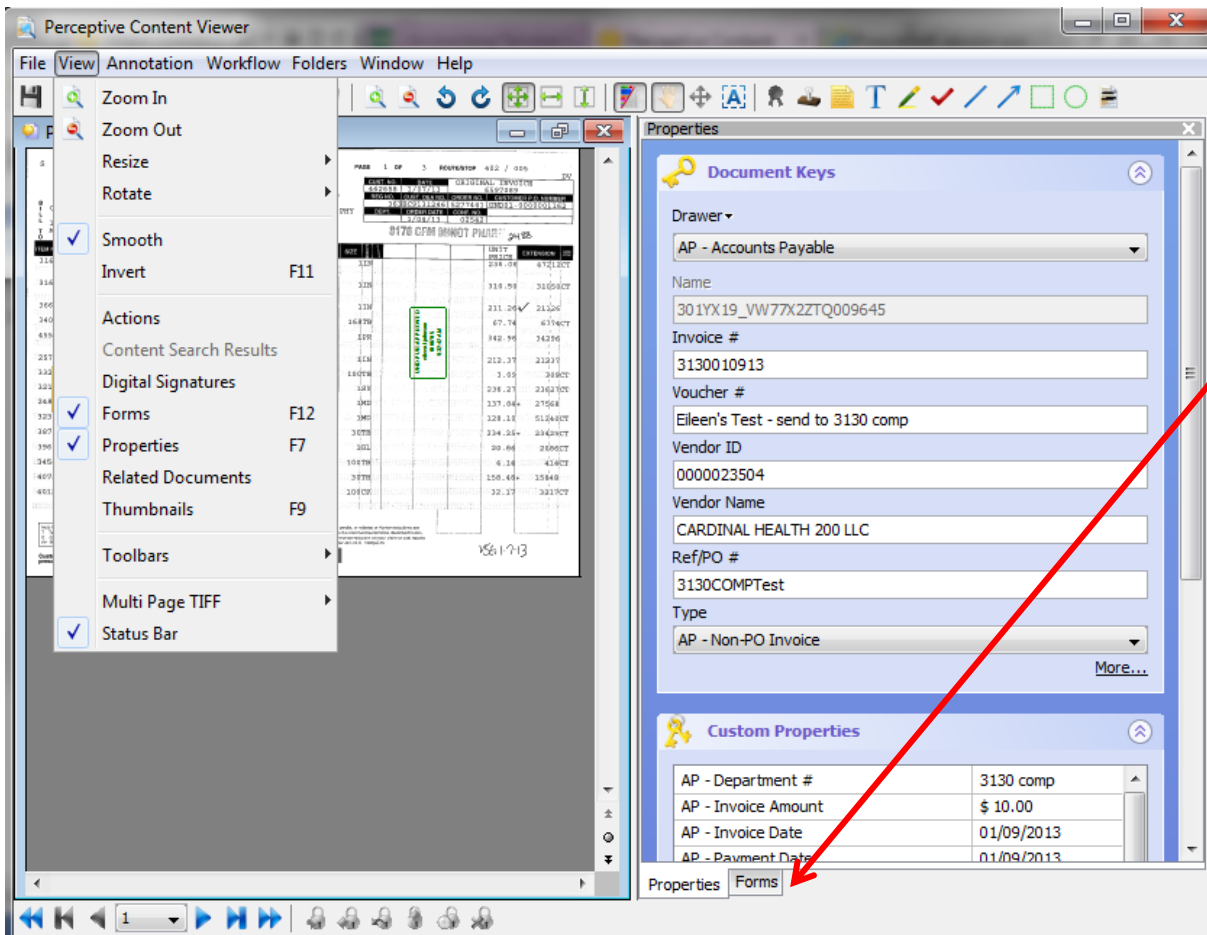


- Still two options
 - Documents – searches all documents in Perceptive Content application
 - Workflow – items in your queue to be processed



WebNow

- Select both Forms and Properties.
- You may toggle between the properties and the eForm.
- Stamps, sticky notes, route forward and other icons/buttons work the same.



PPS Web Page



Procurement & Payment Services

Procurement & Payment Services is a customer first resource and the single point of contact for all centralized procurement and payment activities for the University. Our goal is to identify and implement innovative purchasing and payment practices to better support the needs of the University while adhering to the highest ethical values in the purchase, receipt, and payment of goods and services.

We are responsible for soliciting, contracting and issuing orders for goods and services, as well as overseeing the purchasing card program and performing disbursement functions for all approved expenses for goods, services and reimbursements. We at PPS strive to provide excellent customer service, maintain resourceful practices that follow the state and federal laws, and maintain and expand vendor relations that enable competitive and diversified vendor sources that will provide the best value to the University. Our ultimate goal is to provide professional and courteous service to our internal and external customers while remaining in compliance with University policies and federal and state requirements.

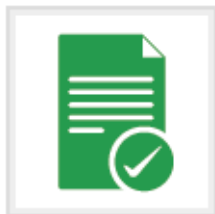
Vendor Fair 2018

3rd Annual UND Vendor Fair - November 15, 2018

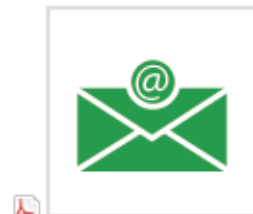
[2018 Vendor Fair Registration](#)

For more information email: [✉ UND.PPS@und.edu](mailto:UND.PPS@und.edu)

Policies



Current Newsletter



Cooperative Contracts



Training & Guides



PPS Web Page

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(RFPs)
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Purchase Requisitions
Terms & Conditions

Printing/Furniture

Printing Procedures
Printing Vendors
Furniture Purchases
Furniture Vendors

PeopleSoft Finance Access
Perceptive Content Access

Other News

- Reorganization with Finance Division
- Vendor Fair 11-15-18
- Increase in ND Lodging Per Diem as of 10-1-18
- PC Upgrade 11-27 & 28
- Inventories sent out via email
- Check website for additional training videos

Discussion

Questions?



Thank you for your time!