Perceptive Content Refresher

Presented by
Eileen Johnson

September 2018

University of North Dakota

Meet our Team

Janelle

Jana

Jan

Carl

Anna

Dawn

Eileen

Cathy

Jane

Melissa

Dave

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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

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PROCUREMENT & PAYMENT SERVICES

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	☐ View ☐ Create eForm ☐ Approval ☐ Remove Access	☐ View *Workflow coming soon*	☐ View *Workflow coming soon*
Perceptive Content Application	**Purchasing**	**Contracts**	**Leases**
Access Requested / Removed	☐ Requestor ☐ Department Approver ☐ Remove Access	☐ View ☐ Edit ☐ Remove Access	☐ View ☐ Edit ☐ Remove Access

Notes

Department Head Approval

Department Head Approving the Request (Signature Required)	

Procurement & Payment Services Approval

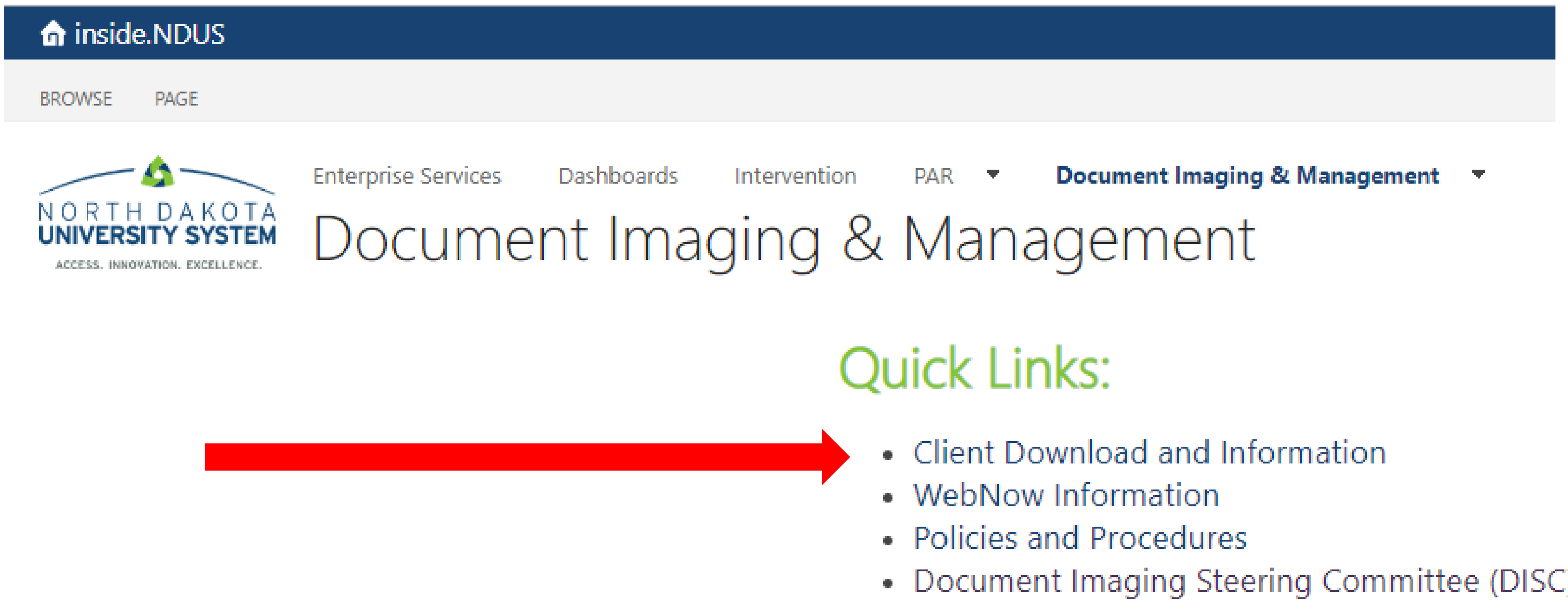
User Group to give Access to (ex: Power User, Scanner, Viewer, User)	

Software Client Download

- Access software download through SharePoint

  [NDUS-CTS-Enterprise Services SharePoint]()

  Login required



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

Scanning and Capture Profiles

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

General Information

- Document Imaging Terminology
- Support and Responsibilities

System Status:

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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

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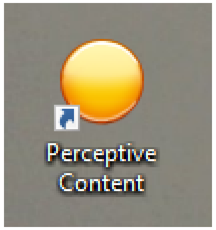
Getting Started

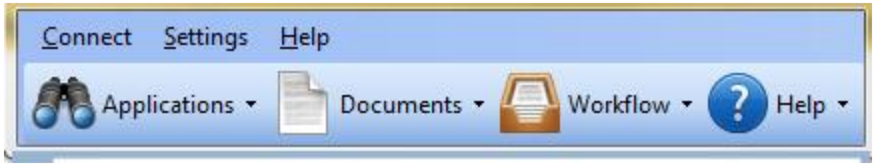


Logging In:

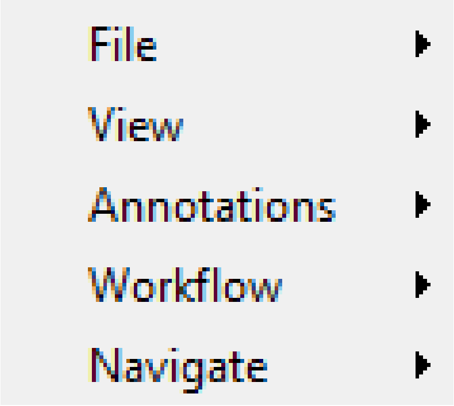
- Requires IDM user name and password

Getting Started

Toolbars & Icons



We'll touch on Five toolbars within PC



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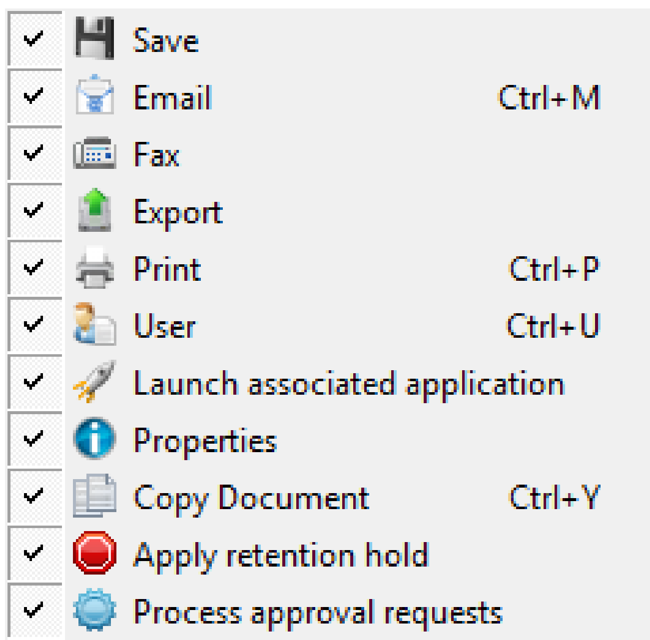
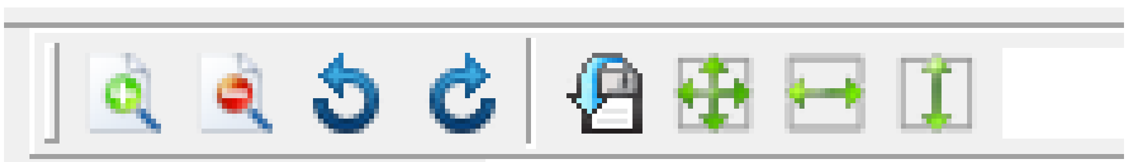
Getting Started

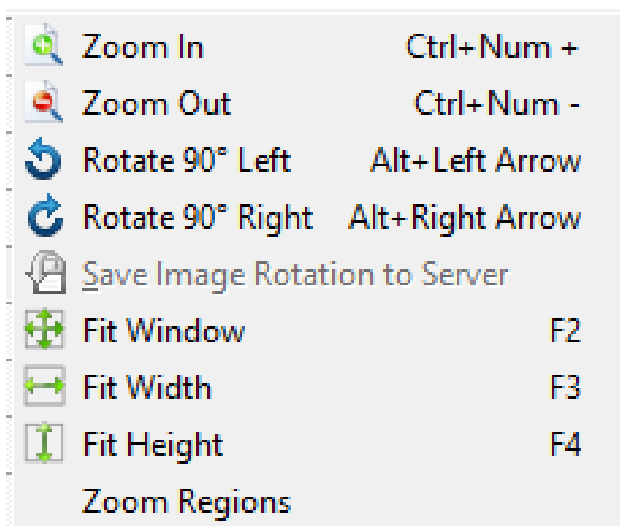
File Toolbar



Getting Started

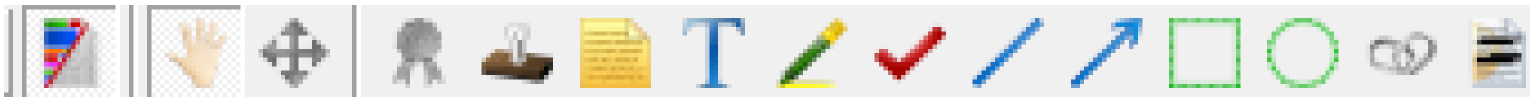
View Toolbar

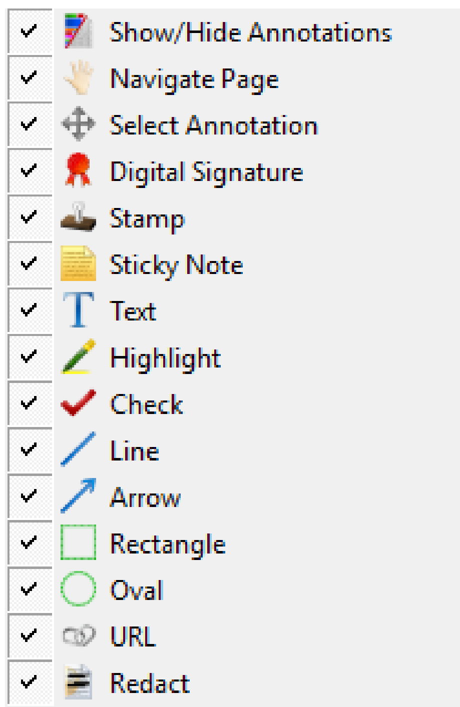




Getting Started

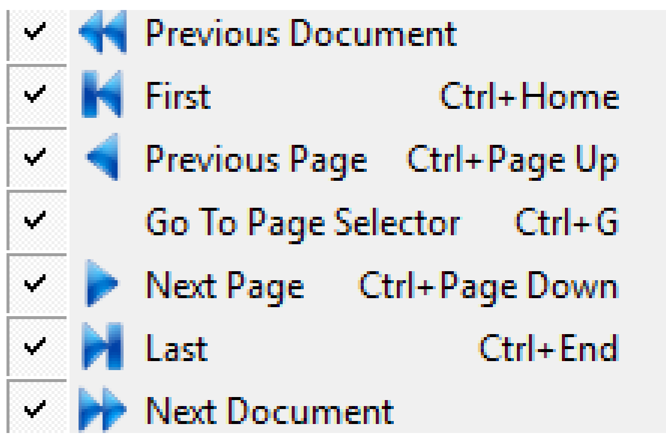
Annotations Toolbar





Getting Started

Navigate Toolbar



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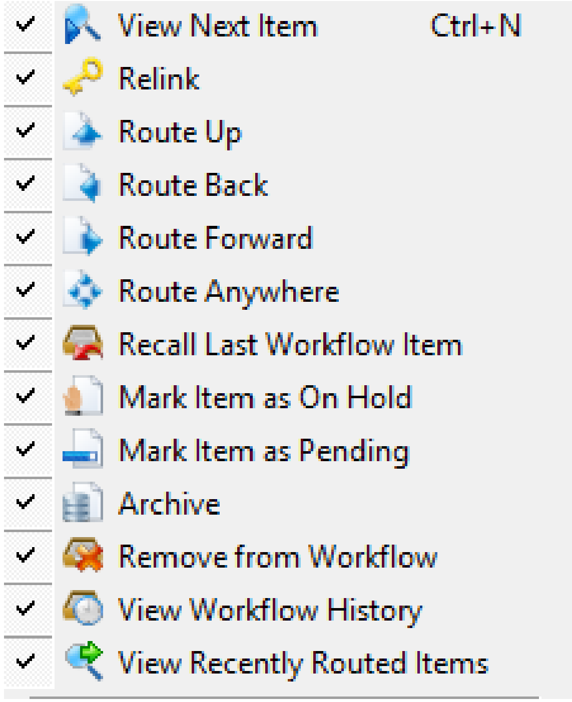
Getting Started

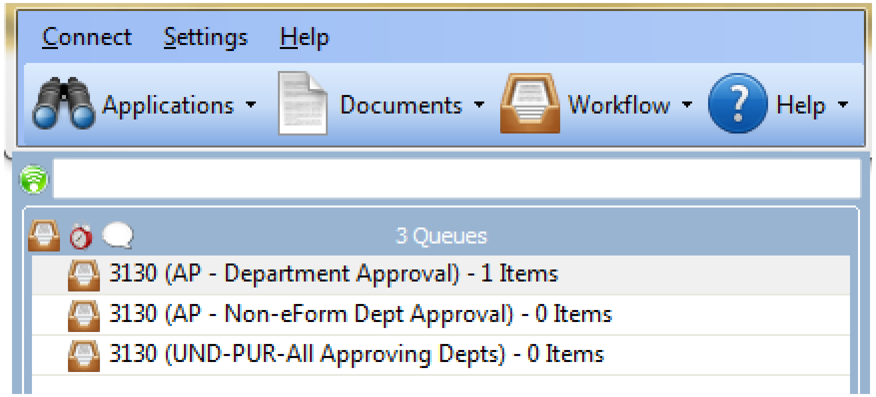
Workflow Toolbar



Helpful Tools

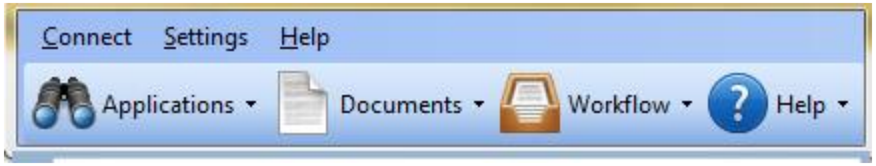
Message Center

- Provides overview of outstanding items in your workflow

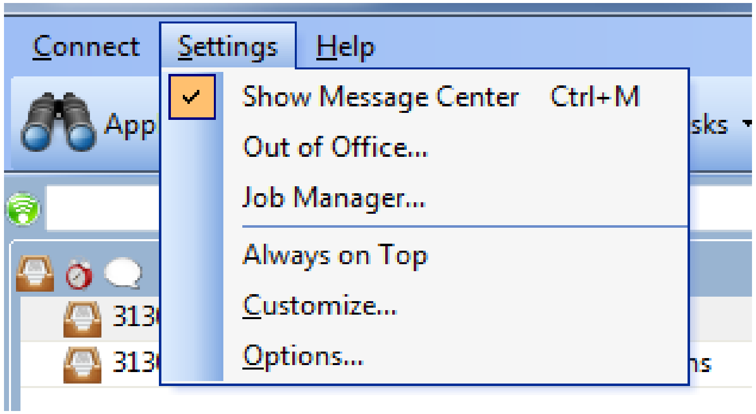


Helpful Tools

To enable the message center



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



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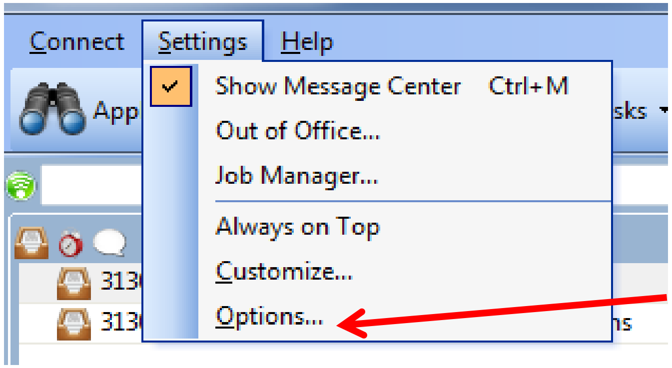
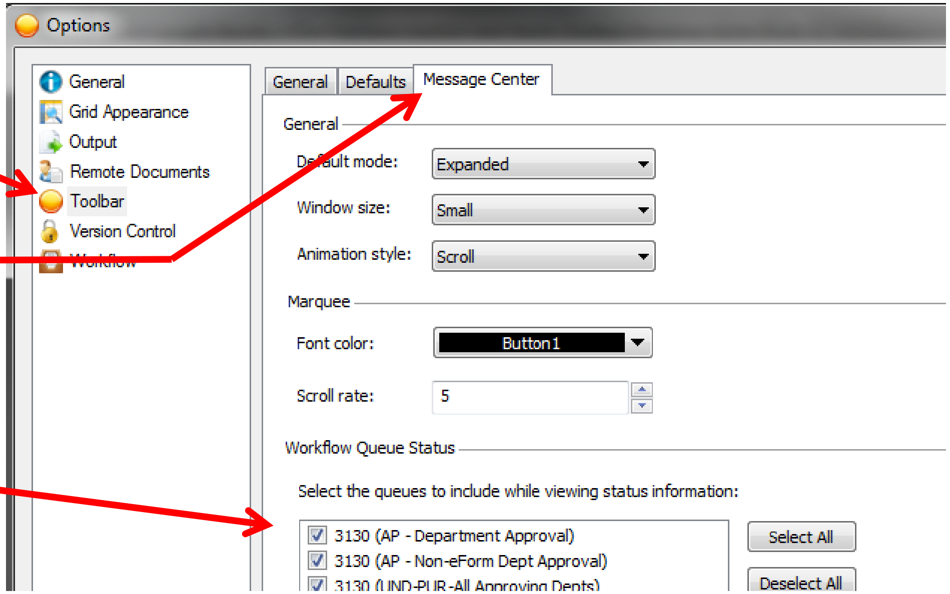
Helpful Tools



- 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



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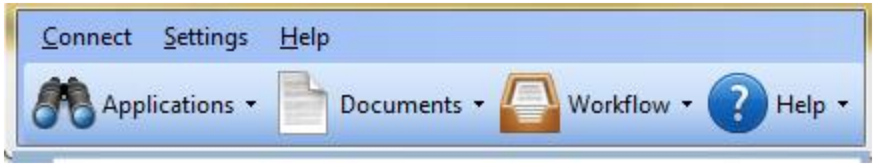
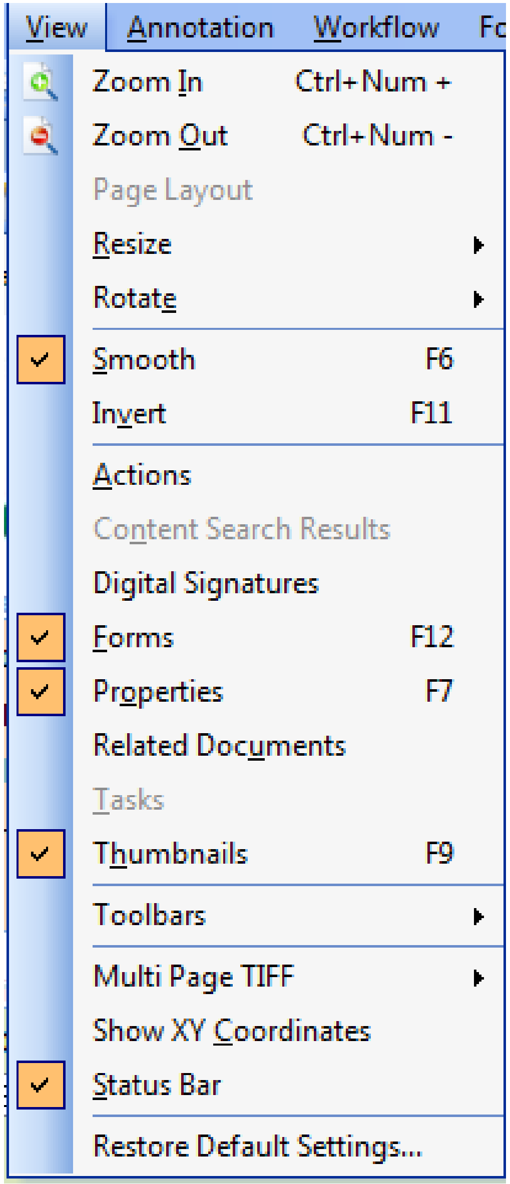
Helpful Tools

Hot keys available in Perceptive Content

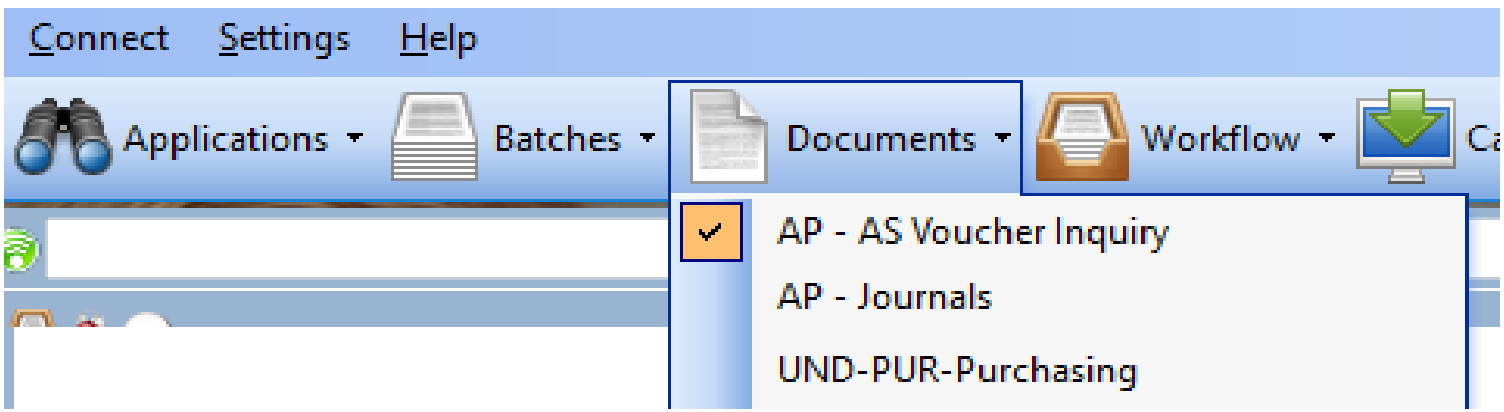
- Forms (F12)
  - Brings up eForm
- Properties (F7)
  - Shows index fields & custom properties
- Thumbnails (F9)
  - Small page images





Find a Document

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



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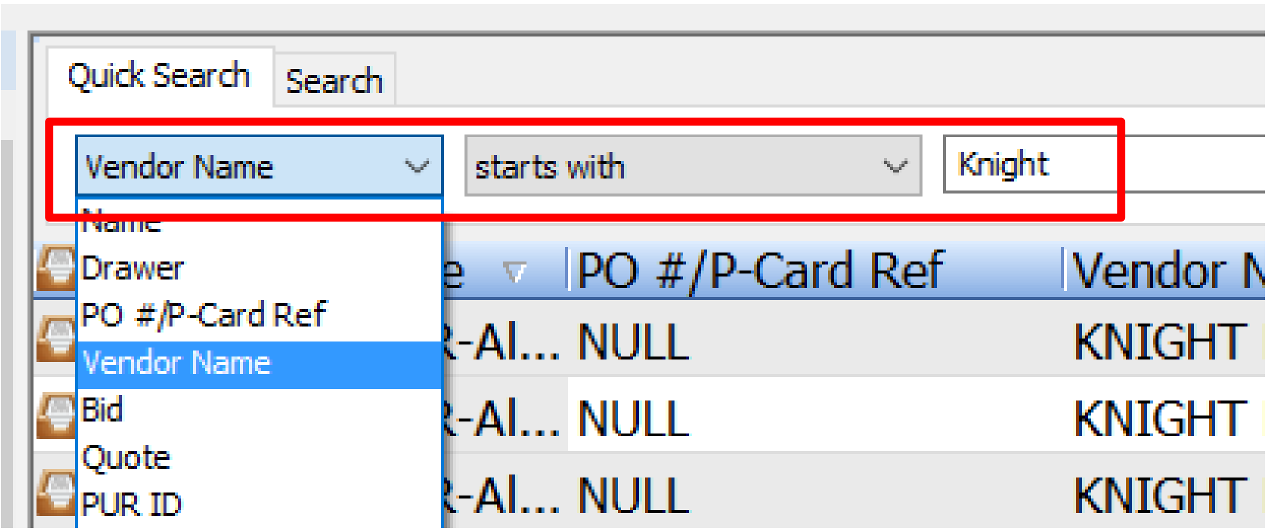
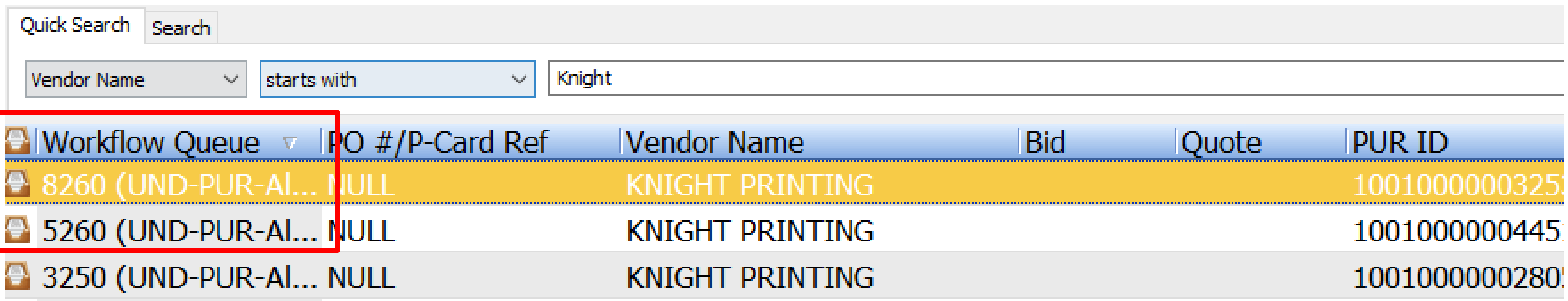
Find a Document

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

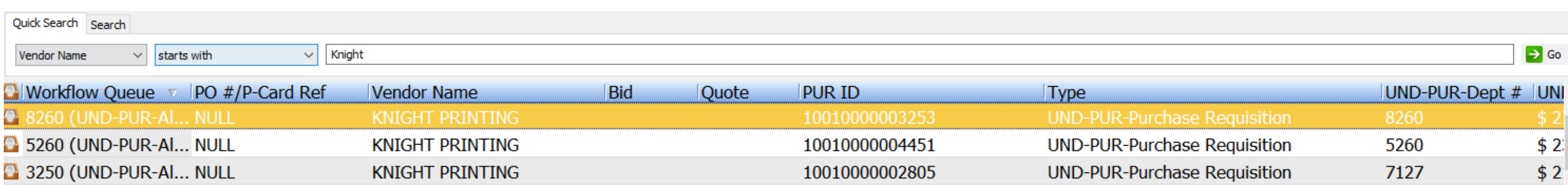


Find a Document

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



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



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PPS documents to search

Views

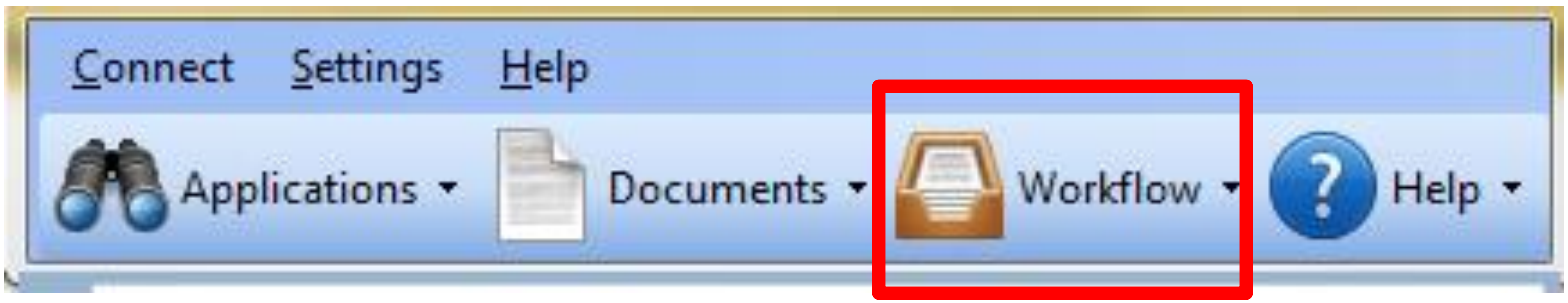
- Application Plans
- Documents
  - AP - Journals
  - UND-AP-AP Voucher Inquiry
  - UND-AP-Archive
  - UND-AP-Department Authorization
  - UND-AP-JV-Journal Voucher
  - UND-AP-PCard
  - UND-AP-PCard-Archive
  - UND-PUR-Purchasing
  - UND-PUR-Contracts

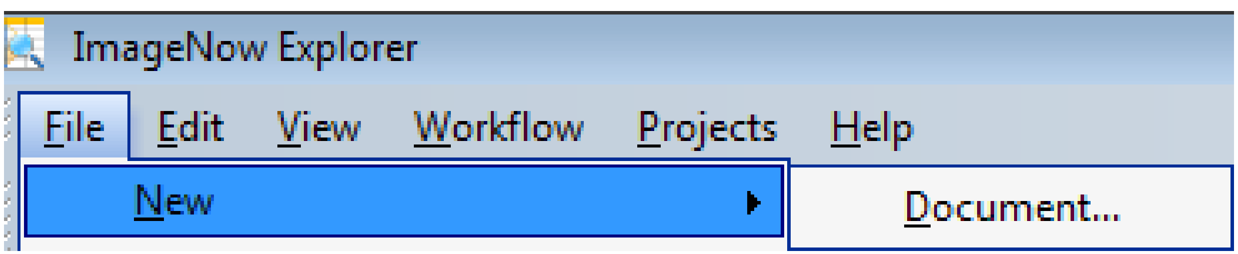
Purchase Requisition in Perceptive

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

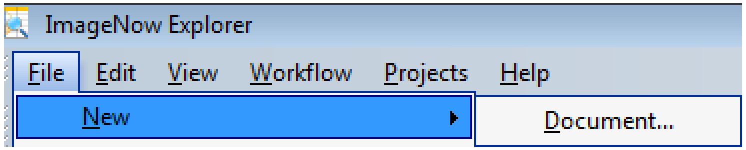
Purchase Requisition in Perceptive

Select Workflow

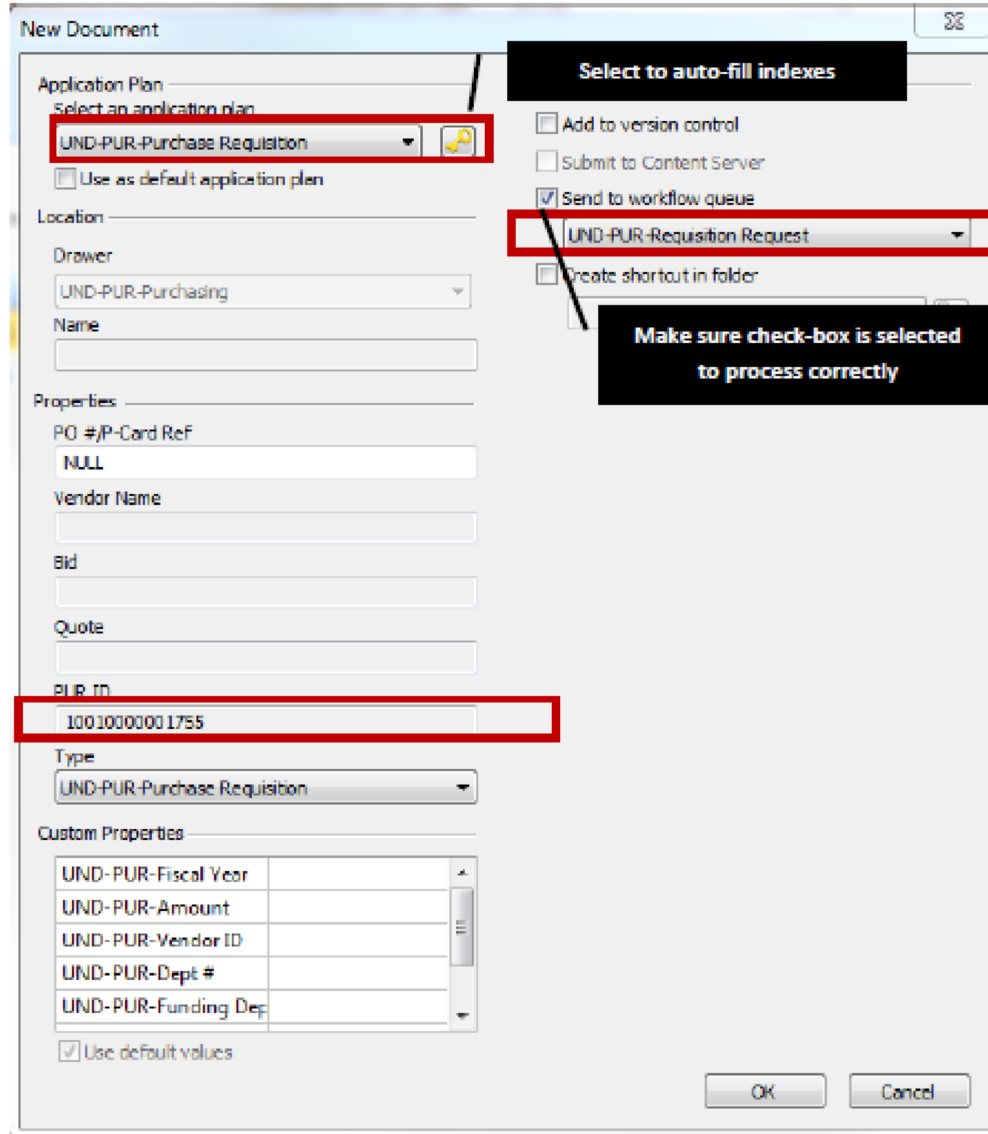




Purchase Requisition in Perceptive



- 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



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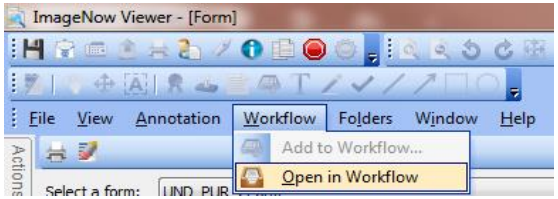
Purchase Requisition in Perceptive



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: 09/24/2015

Requestor Information

Dept Name	Purchasing	Dept #	3125	Dept Contact	Vicki Von Harz
Dept Phone #	777-2682				
Ship to Address	264 Centennial Drive	Ship to Address 2		STOP #	8381
City	Grand Forks	State	ND	Zip	58202

Select magnifying glass to populate vendor information.

Vendor Information

Vendor ID		Name	Knight Printing	Address	3401 Fiechtner Dr
Address 2	PO Box 7100	City	Fargo		
State	ND	Zip	58106	Phone #	
Contact Name	Jeff Anderson	Contact Email			

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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
+				Total:	6625.00

Line items need to be in numerical sequence.

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
+						Total:	6625.00

Funding for each line # must equal the dollar amount for the line # in the description and must be in numerical sequence.

UND Bid/Quote

Bid # ____ Quote # ____

☐ Alternate Procurement Request (Remember to attach the forms)

Order Placement Instructions *(One option must be selected)*

- ☐ Department will contact vendor with purchase order
- ☐ Purchasing to email vendor purchase order (contact email address)
- ☑ Purchasing will place order on P-Card
- ☐ Ship Order Complete
- ☐ Send all copies to Grants and Contracts

Must select an option prior to submitting

Major Equipment Purchase

☑ Single Capitalized Item ☐ 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.

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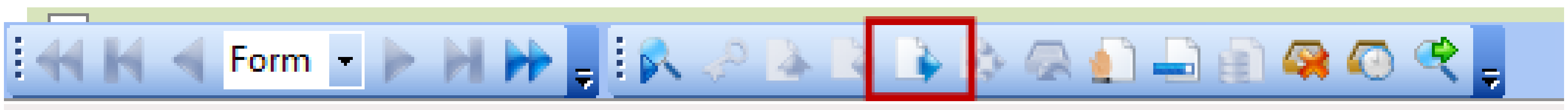
Purchase Requisition in Perceptive

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.

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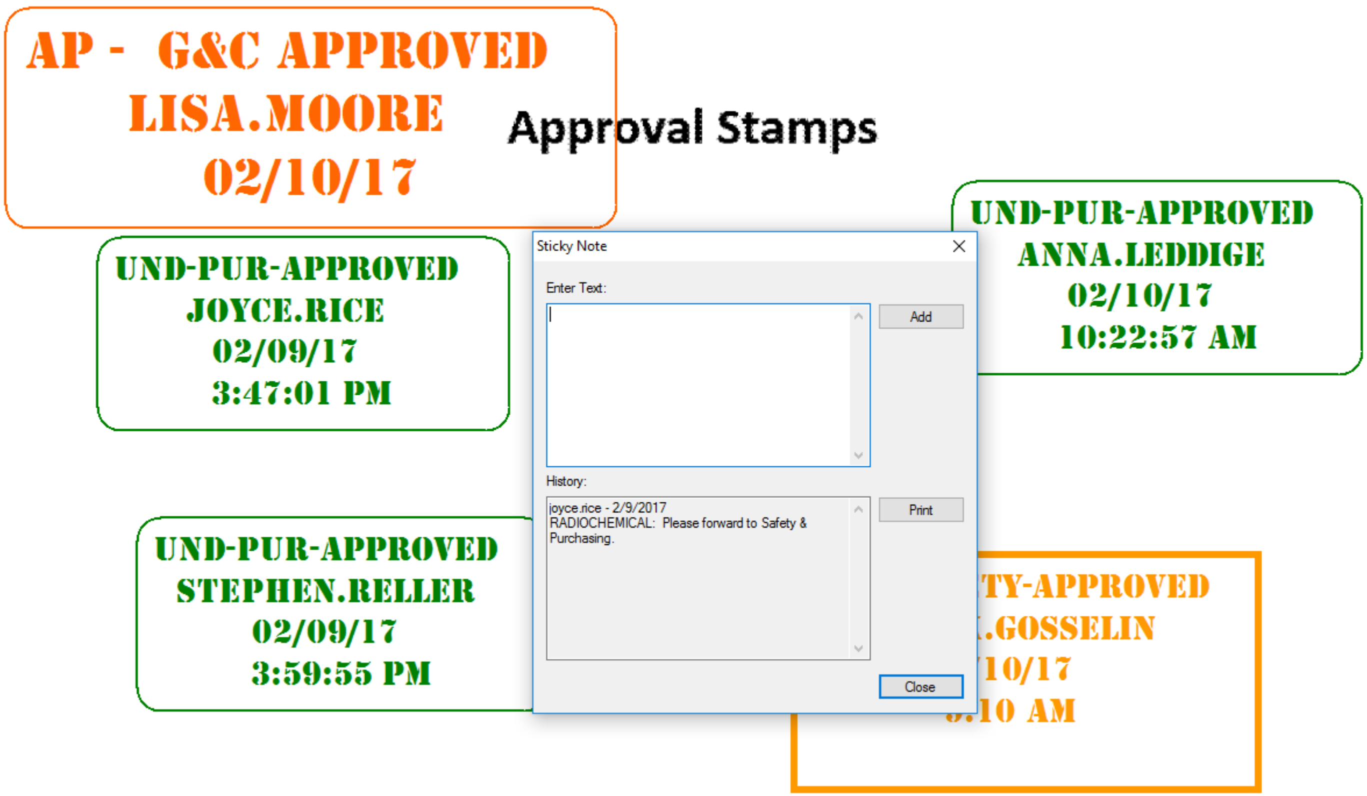
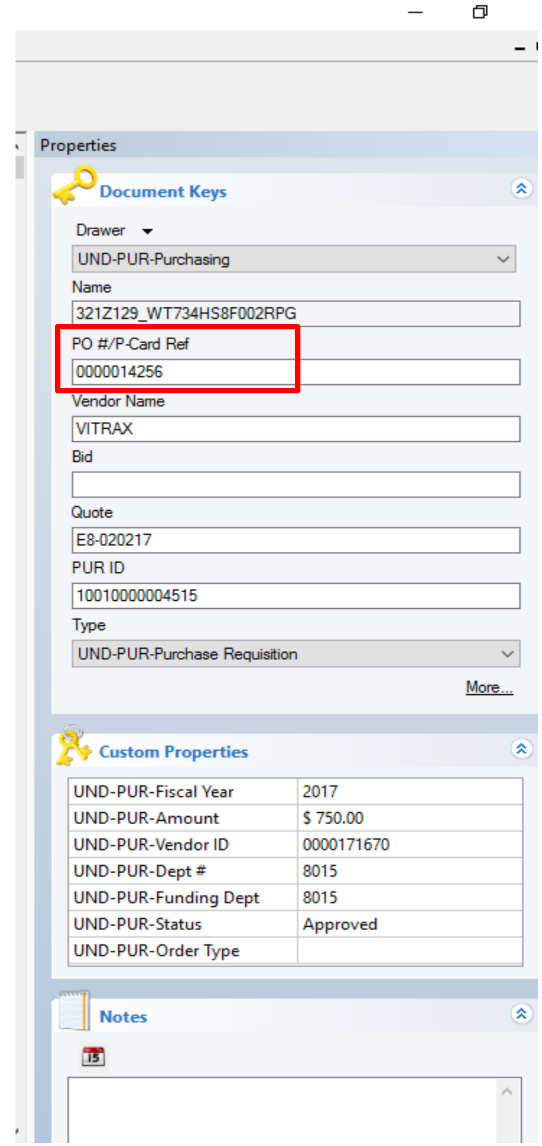
Purchase Requisition in Perceptive

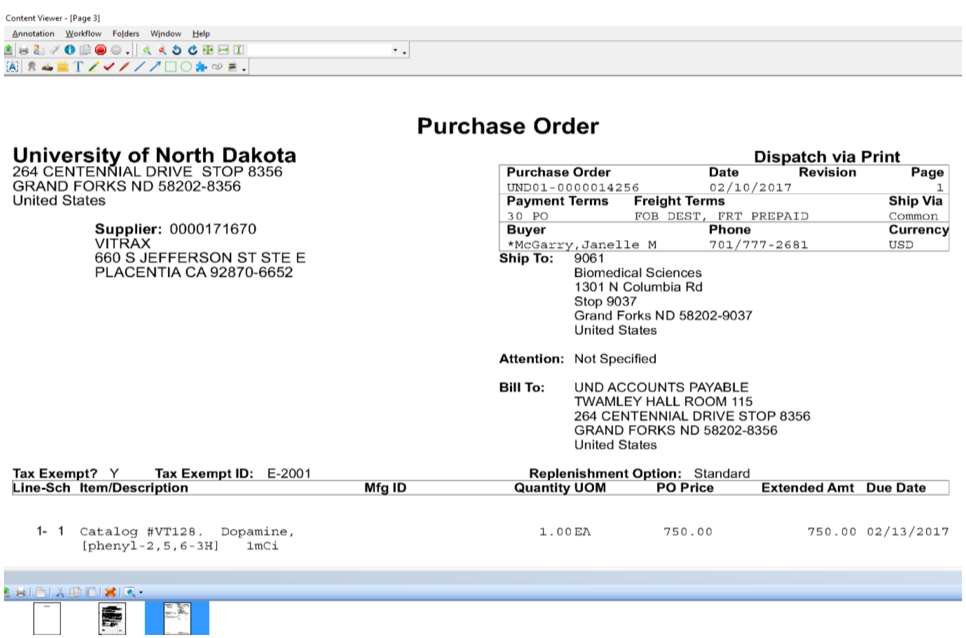
- Approval Page will show all approval stamps & Comments on a sticky note



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.





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		1.00EA	750.00	750.00	02/13/2017

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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.

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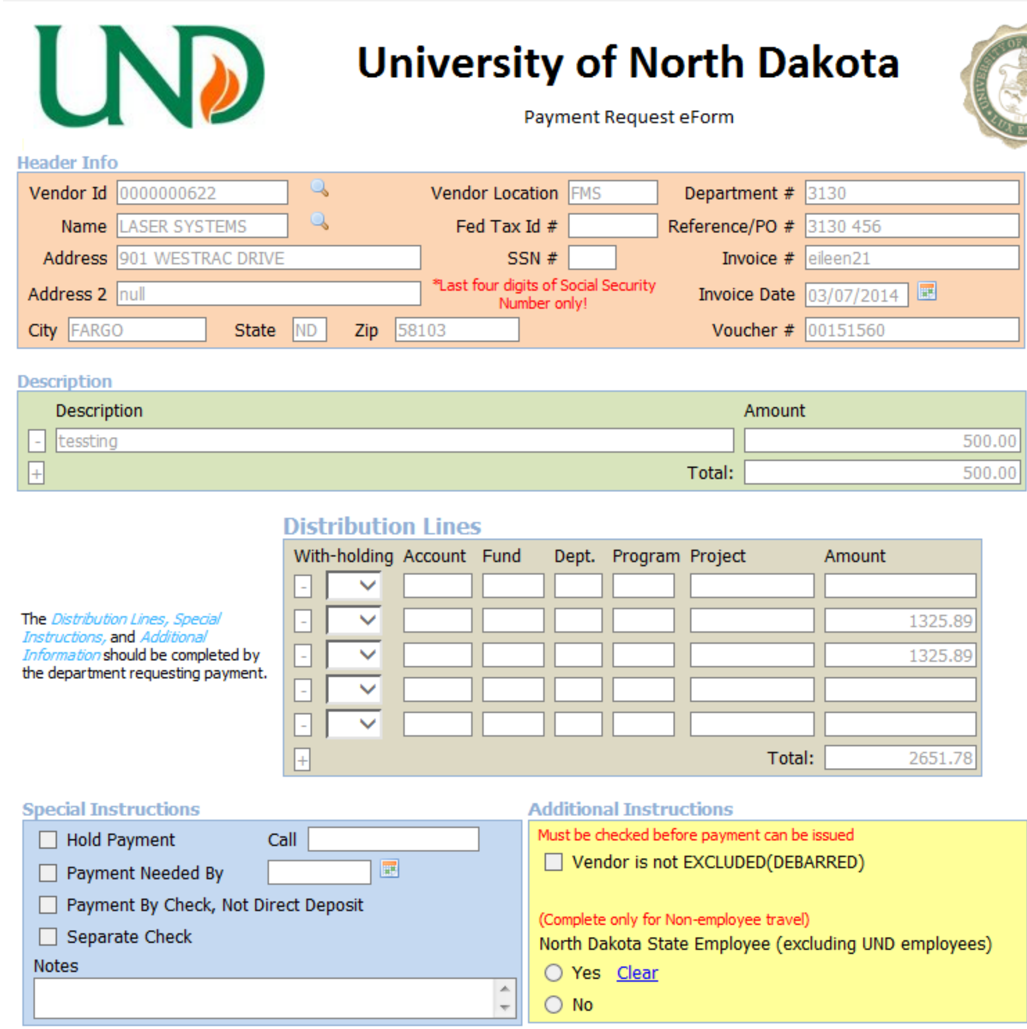
Accounts Payable Workflow

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



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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
testing	500.00
Total:	500.00

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

Distribution Lines

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

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)

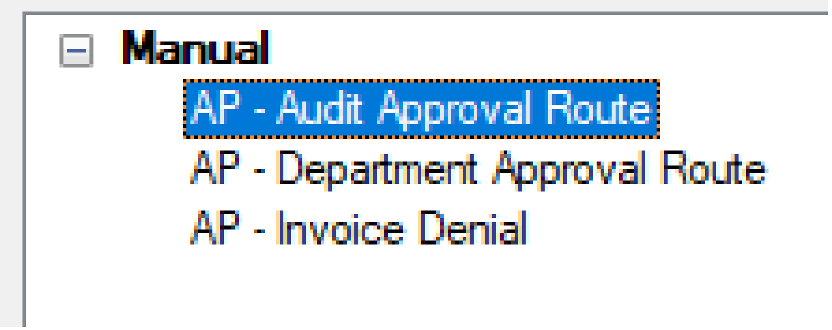
North Dakota State Employee (excluding UND employees)

- 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:



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

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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

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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

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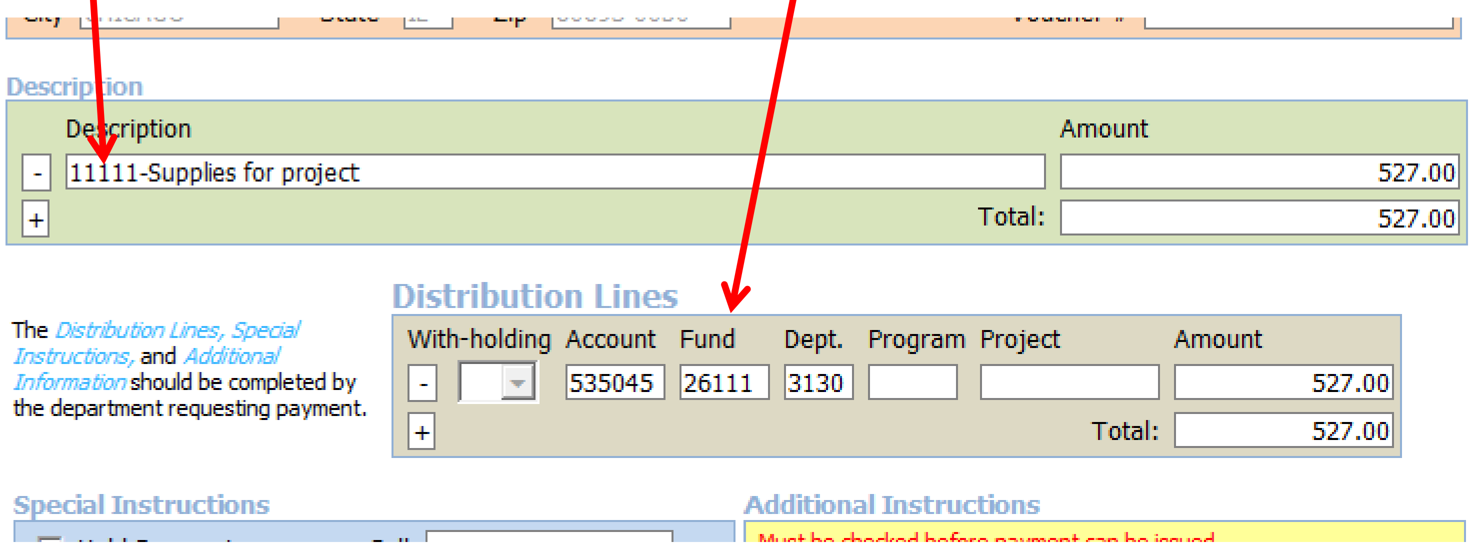
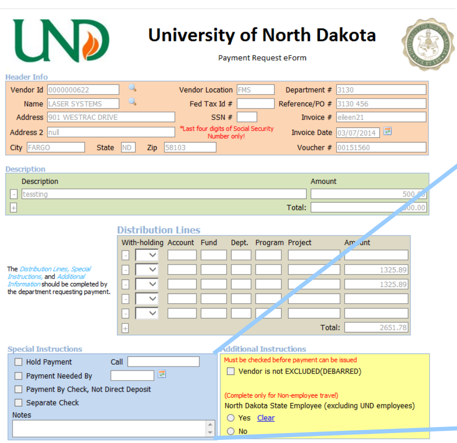
AP – Reminders

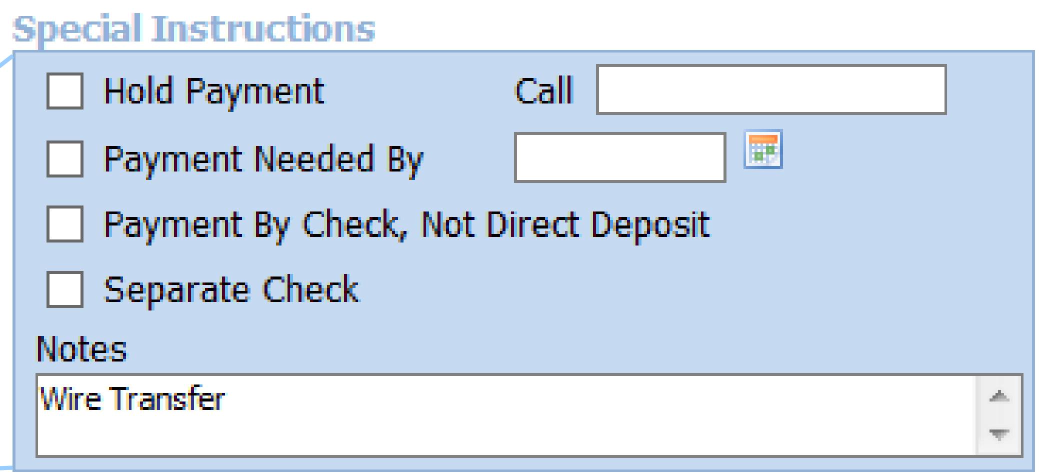
- When processing a payment being funded by a Foundation flow through fund (26XXX)
  - 26XXX fund is in the distribution lines
  - Foundation fund (issued by the UND Foundation) is in the first five digits of the description line
  - Add to sticky note within the Preq



AP – Reminders

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

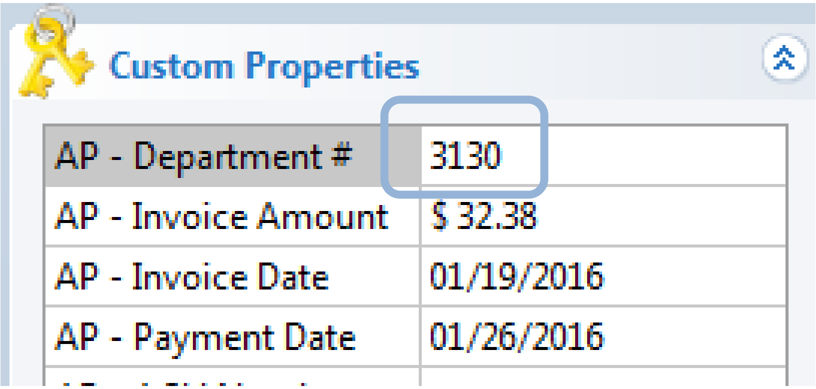




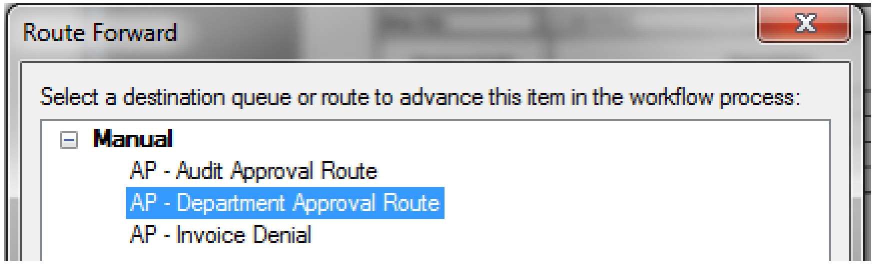
  - Wire transfer form must be attached to the payment request

AP - Reminders

- Route to another department
  - Enter the new department number



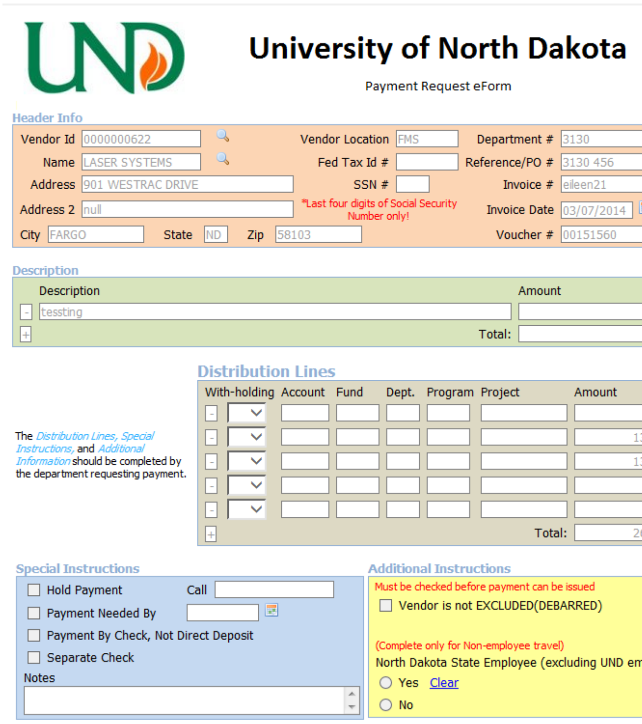
  - Route forward to:
    - AP - Department Approval Route



UNIVERSITY OF NORTH DAKOTA

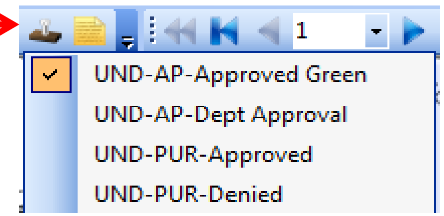
AP - Reminders

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



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

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General Reminders

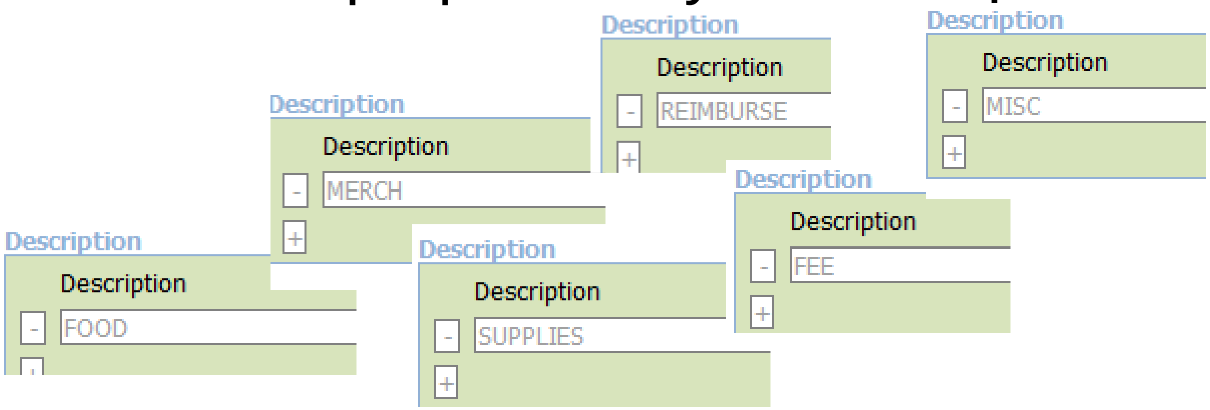
> Payment/Purchase Order information should be able to stand on its own for audit by state or federal auditors

- Document your business purpose

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

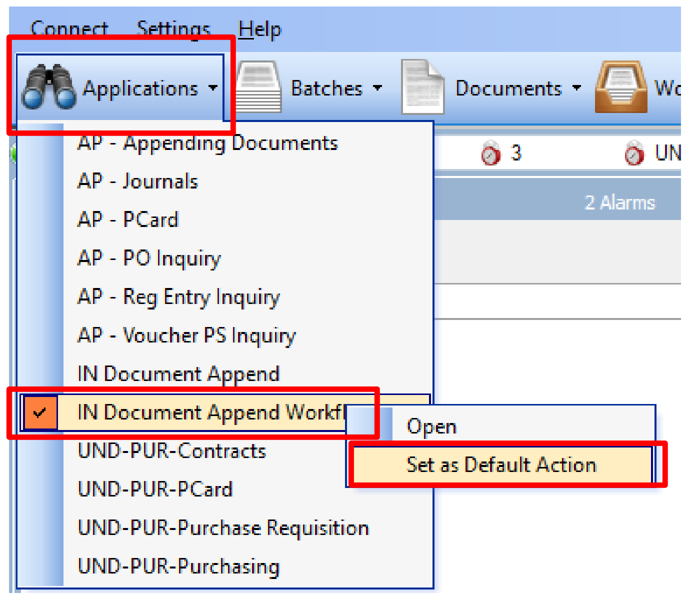
- Clarify your business purpose on your P Req



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

Appending to an existing Document

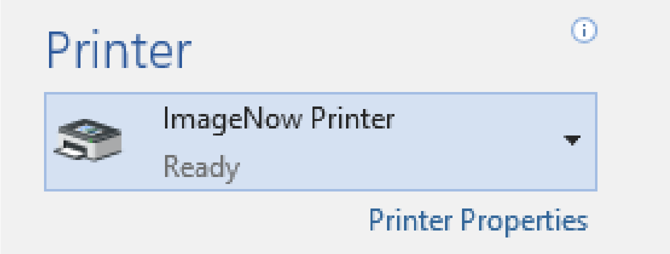
- The application within Perceptive must be set at click ‘IN Document Append Workflow’ to append within workflow.



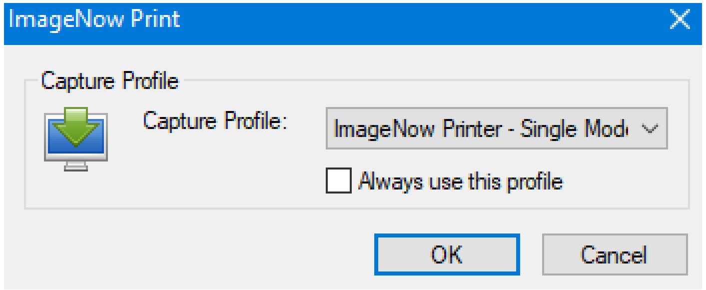
- You must have the document you want to attach TO in Perceptive open in your workflow

Appending to an existing Document

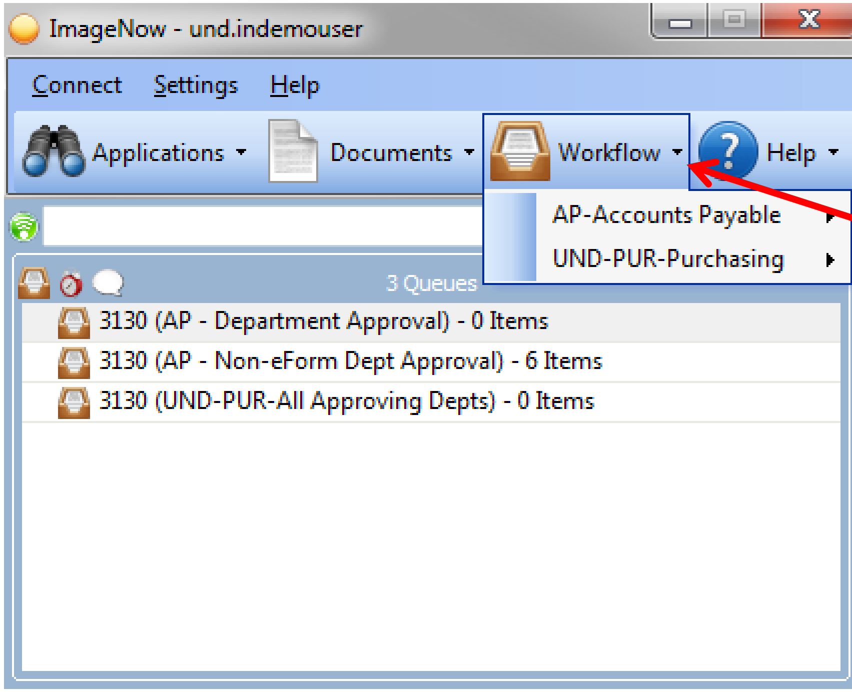
- Within the originating software, select print and print to the ImageNow Printer



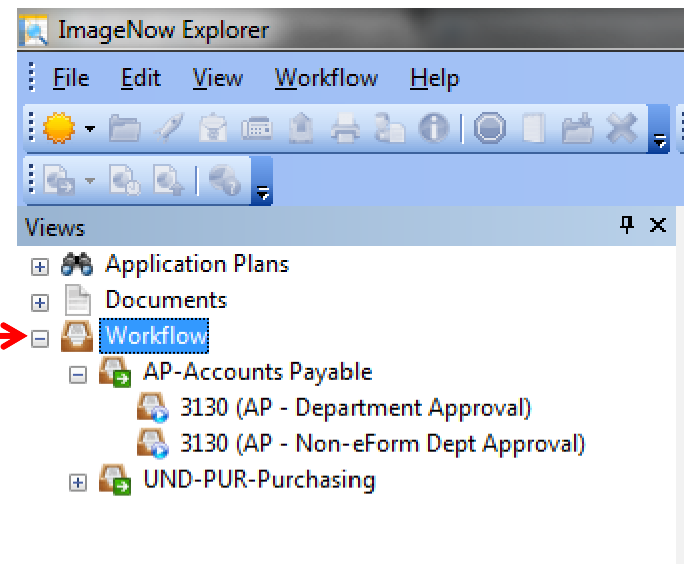
- Select the Single Mode capture profile and save



Tips & Tricks



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



- Click the ⊞ to expand and show all workflows

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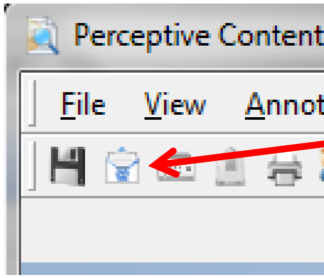
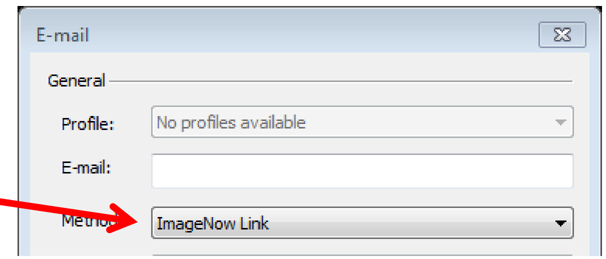
Tips & Tricks

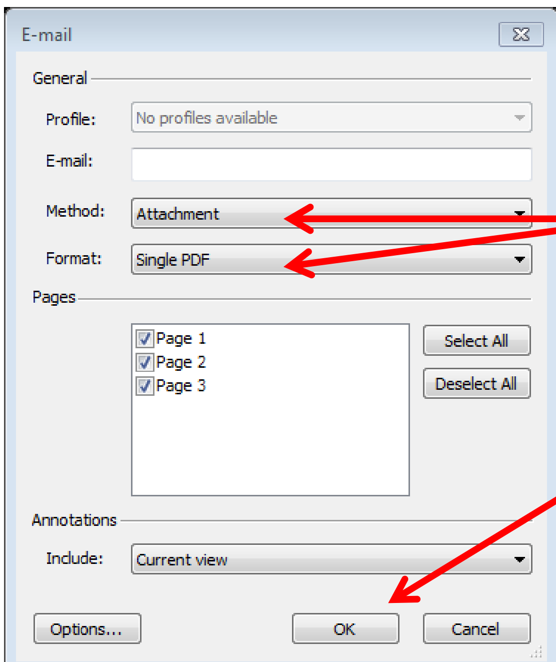
- Email from Perceptive Content



  - 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

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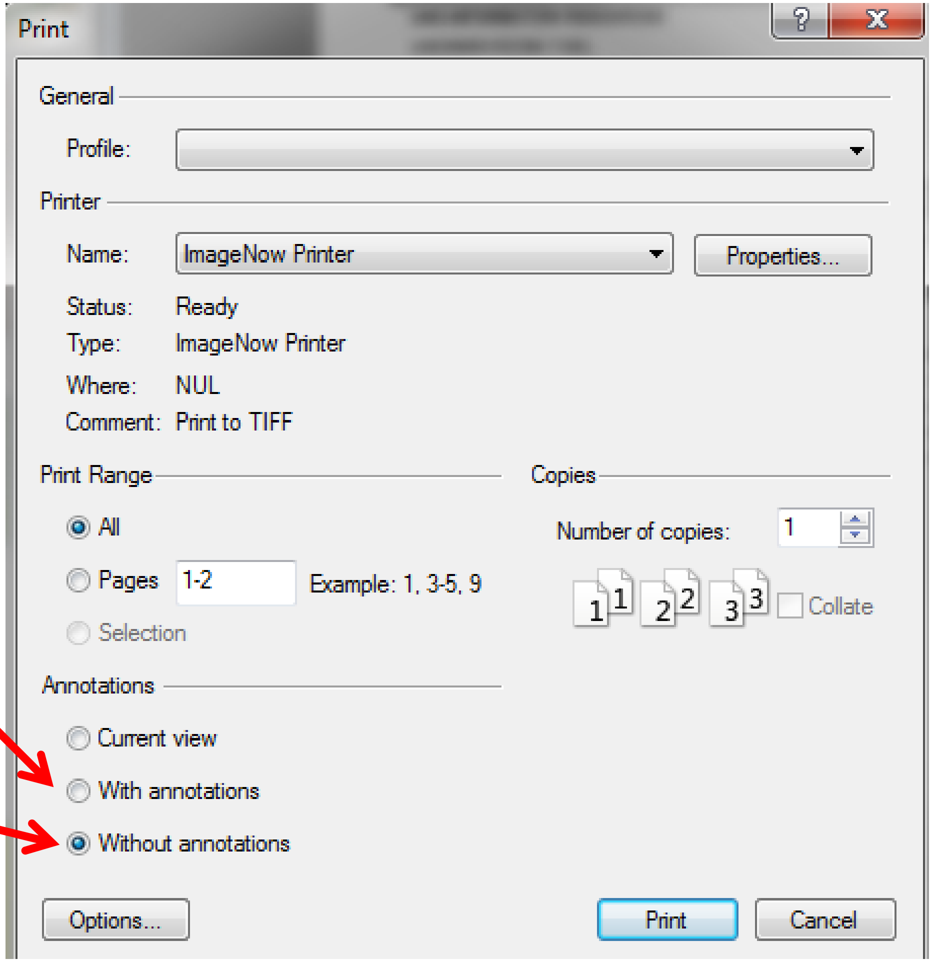
Tips & Tricks

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



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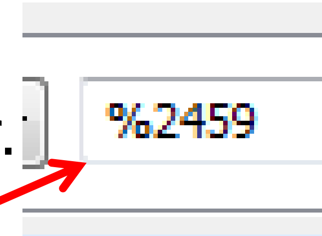
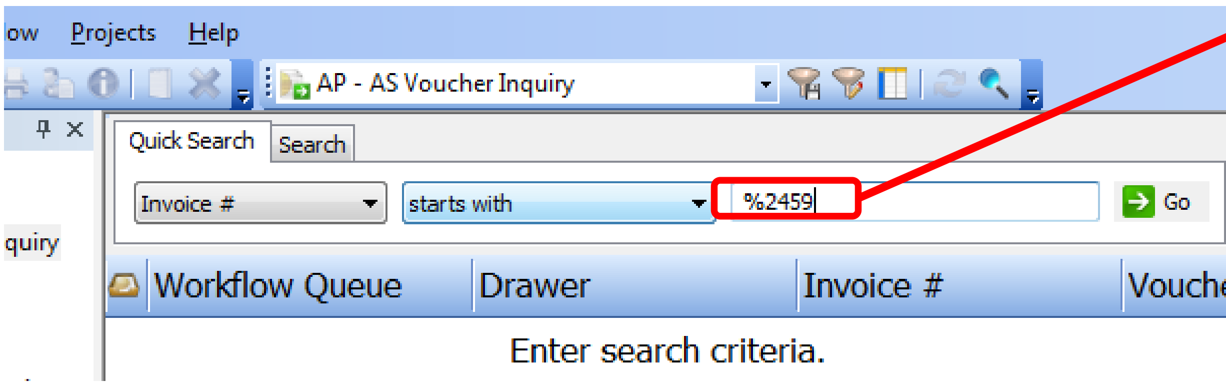
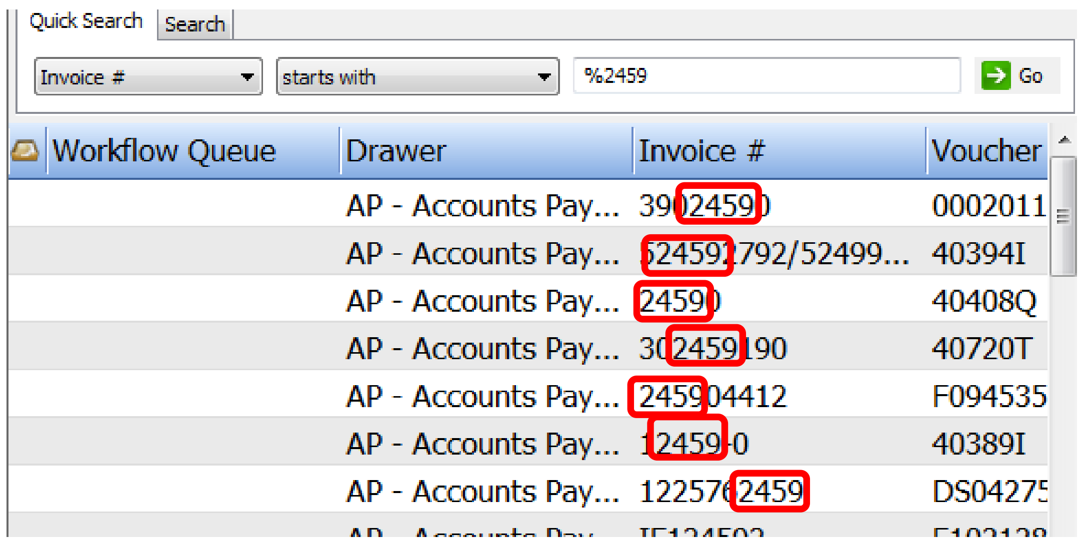
Tips & Tricks

- % is the Perceptive Content wildcard character.





- Results



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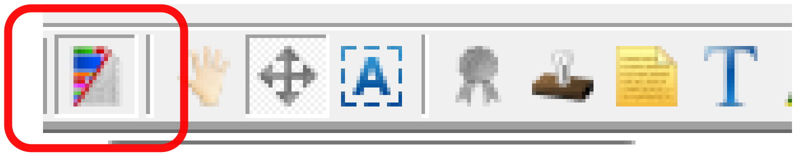
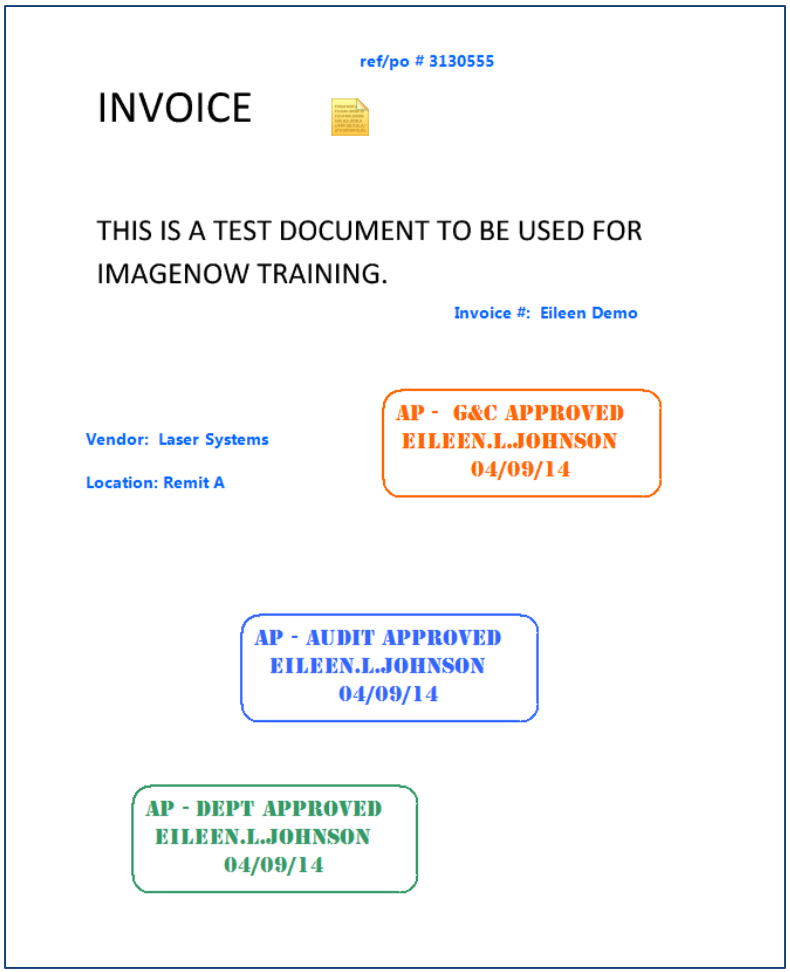
Tips & Tricks

- "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

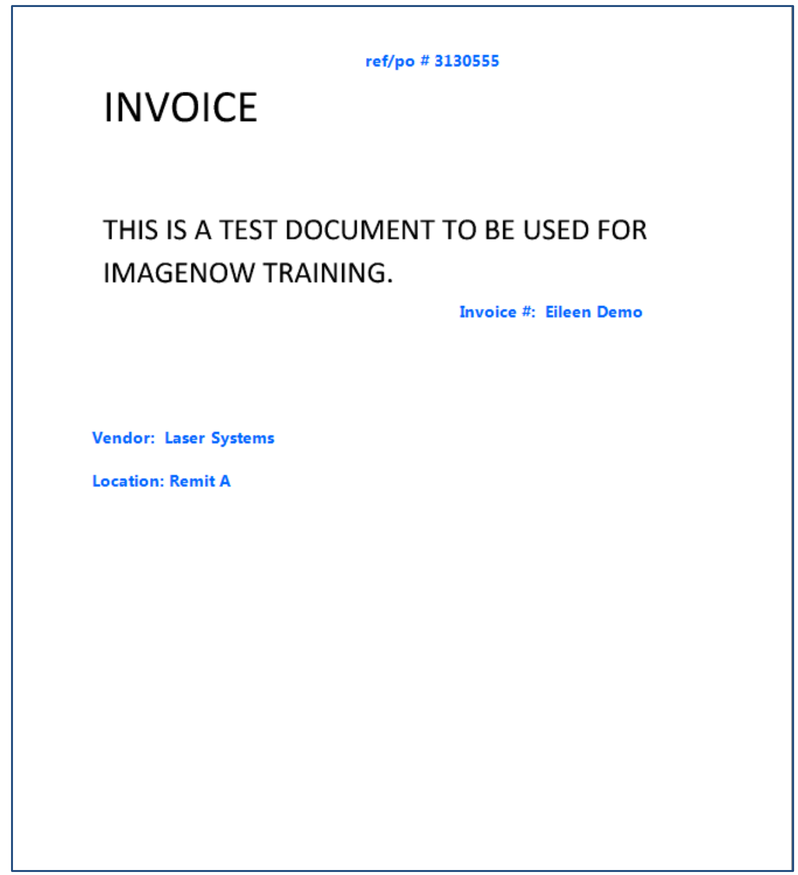
Vendor: Laser Systems

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.

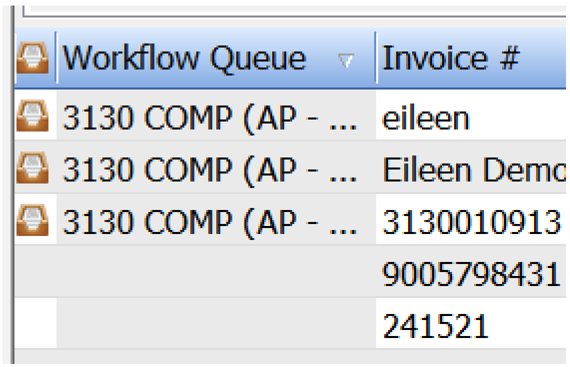
Invoice #: Eileen Demo

Vendor: Laser Systems

Location: Remit A

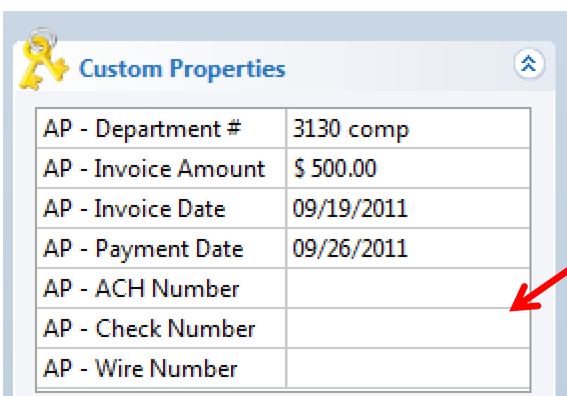
AP - Tips & Tricks

- Has this invoice been paid?????



	Workflow Queue	Invoice #
	3130 COMP (AP - ...	eileen
	3130 COMP (AP - ...	Eileen Demo
	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

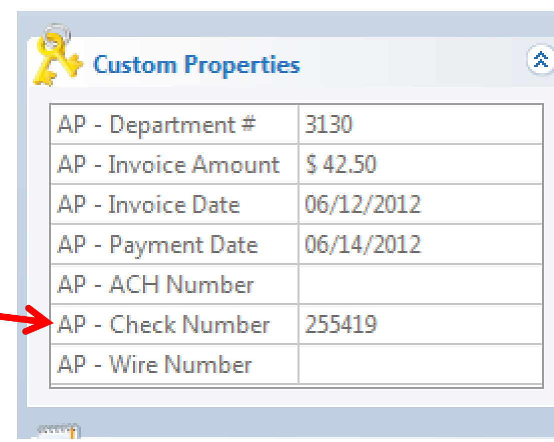


Custom Properties

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	

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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

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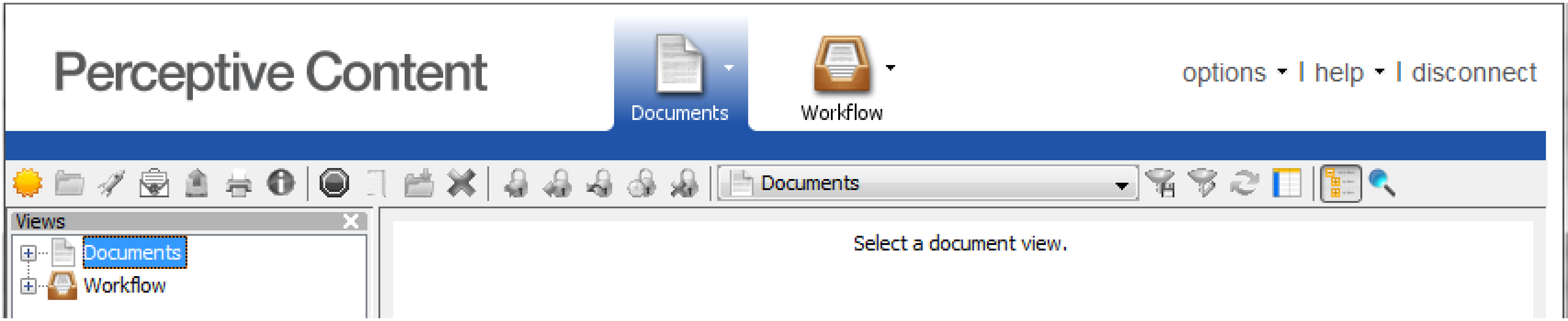
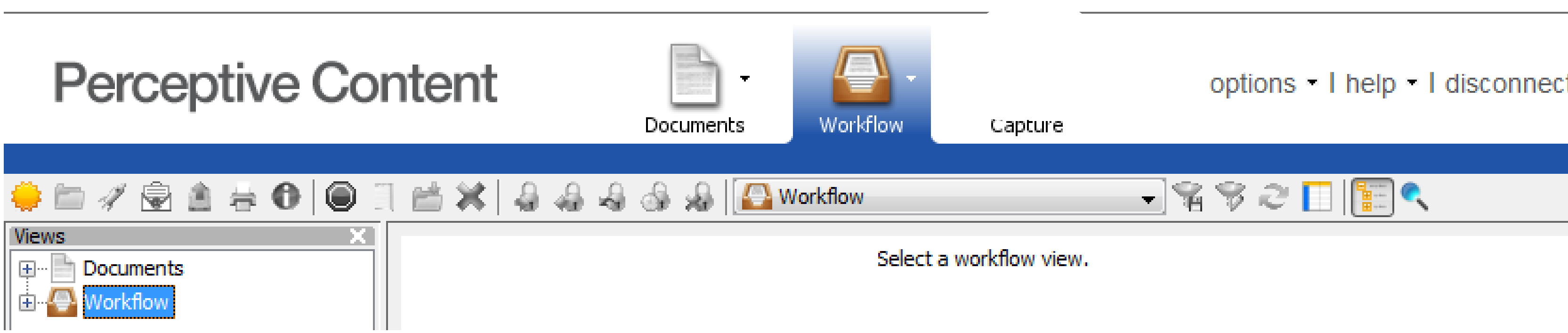
WebNow



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



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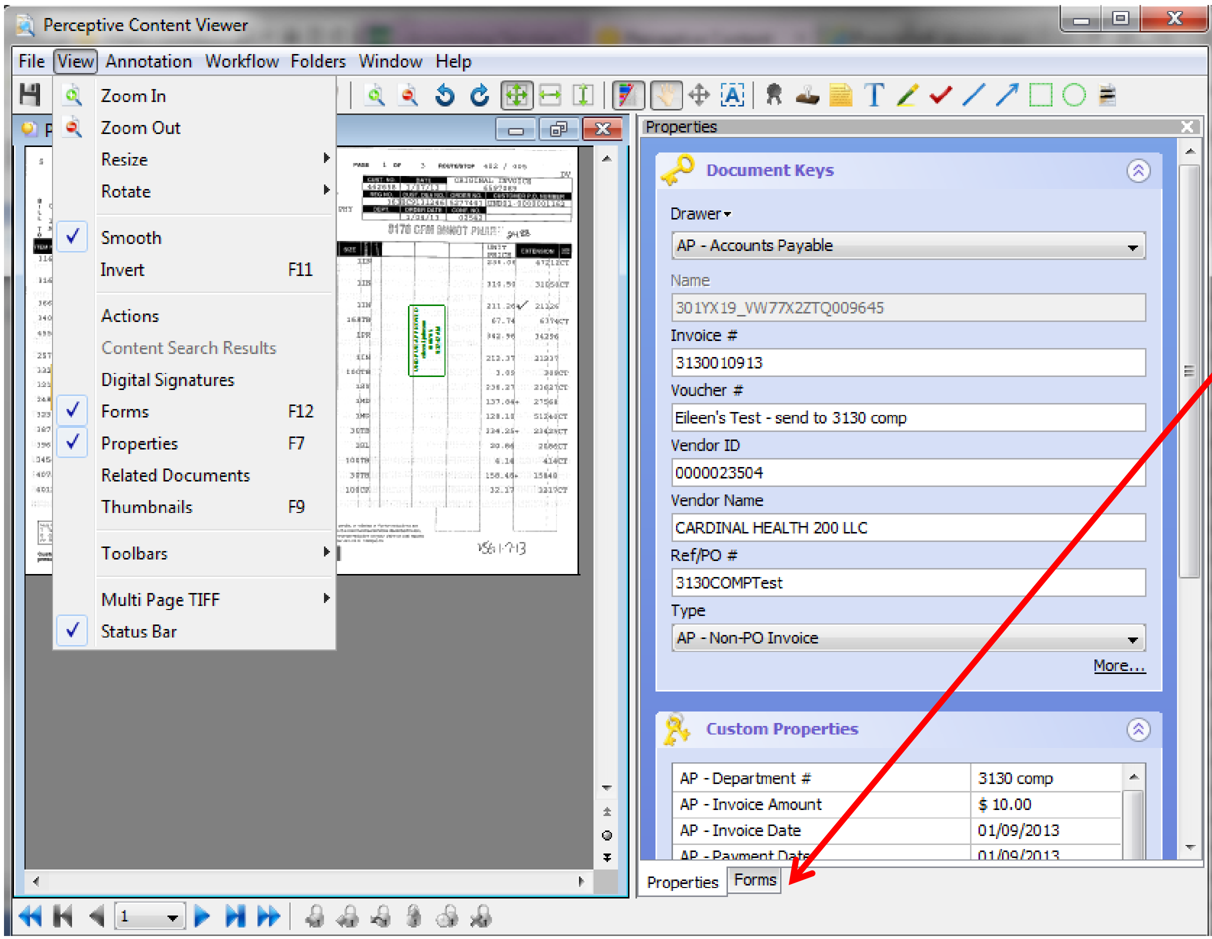
WebNow



- 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

Home About Procurement Payment P-Card Asset Mgmt T & E Forms Resources

Finance Operations 〉 Procurement and Payment Services

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

Policies **Current Newsletter** **Cooperative Contracts** **Training & Guides**

PPS Web Page

Home | About | Procurement | Payment | P-Card | Asset Mgmt | T & E | Forms | Resources

About Us
- Staff Directory
- Email Addresses

Payment
- How to Process
- Determination of Worker Status
- Expense Table
- Meals Table
- Nonresident Aliens

Asset Mgmt
- Major Equip
- Minor Equip
- Annual Inventory Procedures
- Major Annual Procedures
- Minor Annual Procedures
- Modular Furniture
- Surplus Property
- Forms
- Training
- Policies

P-Card
- General Information
- Manual
- PaymentNet Link
- P-Card Change Request
- P-Card Application

T & E
- General Information
- T&E User Guide
- T&E Approver Guide
- Travel & Expense FAQ's

Resources
- Account Code Listing
- FAQ's
- FDN Flow-Thru Instructions
- Fiscal Year End Process
- Calendar
- Glossary
- Links
- Newsletters
- Policies
- Tax Exempt Documents
- Training & Guides

- PeopleSoft Finance Access
- Perceptive Content Access

Procurement

Contracts
- Cooperative Contracts
- Services Template
- Consultant Template
- Guest Speaker Template
- Contract Signature Authorization

Bids/Quotes/RFP
- Alternate Procurement Request
- Bid Request Form
- Quotation Template
- Request for Proposals (RFPs)
- RFP Evaluator Guide

Purchase Orders & Requisitions
- Changes / Cancellation / Closed
- Federal Funds/SAM
- Purchase Requisitions
- Terms & Conditions

Printing/Furniture
- Printing Procedures
- Printing Vendors
- Furniture Purchases
- Furniture Vendors

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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

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Discussion

Questions?

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Thank you for your time!