UNC CHARLOTTE

imagenow
PERCEPTIVE SOFTWARE

AP/TCP
Business Manager Training Manual

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Introduction

This document will assist the department Business Managers with:
- Requesting access to ImageNow
- How to search for invoices and travel documents
- Check the status of those invoices and travel documents

Requesting Access to ImageNow

A Business Manager needing access to Accounts Payable and Travel & Complex Payments documents in ImageNow can request access by submitting an online form.

Before submitting the form, please make sure a University Confidentiality Agreement form has been signed, if not login to Banner SSB to access the Confidentiality Agreement link located under the Employee tab.

Perform the following steps:
1. Click the link ITS ImageNow Add/Remove Access Request
2. The online access request form will open in a browser.
3. Enter in the user needing ImageNow access *NinerNet Username*, *800 Number*, and a *Brief Description of Your Request*.
4. Click on the *Add or Remove* drop-down list to select the permission:
   a. Add Permission
   b. Remove Permission
5. Click on the *Access Group* drop-down list to select *AP Invoice External Viewer*.
6. All ImageNow users must verify that they have read and understand the ImageNow Data Security and PCI Compliance procedures located in the Moodle ImageNow Training Course. To access the documents click the *Moodle* link and then proceed to the Training section.
7. Select the *I Agree* box.
8. Attach your supervisor's approval by clicking the *Attachments* button. ***Note**: The attached approval can be in the form of an image type, PDF or Word document.
9. Click the *Save* button to submit the ImageNow Access Request Form.
10. Click the *Reset* button to submit another form for access.
11. Repeat steps 2 thru 9; but in step #4 for the *Access Group* drop-down list select *TCP Invoice External Viewer*.
12. You can print the form by clicking the *Print* button or attach any supporting documentation to the form by clicking the *Attachments* button.
13. To exit the form, close the browser or tab.

Logging Into WebNow

(ImageNow web version)

1. To access the ImageNow web application, open a browser window, type the URL, https://imagenow.uncc.edu/, in the navigation toolbar to display the login screen. Enter your NinerNet credentials and press the CONNECT button as seen below:
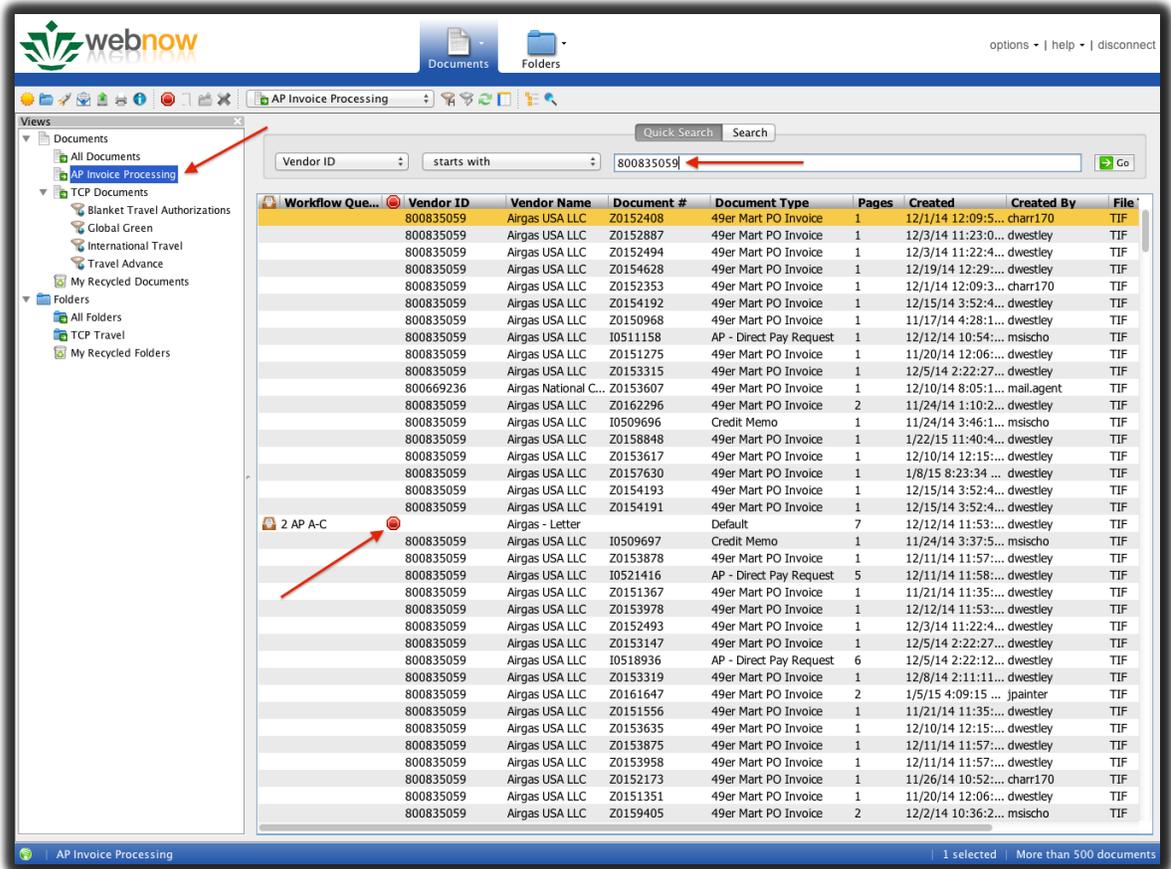

2. Once logged into the application, a screen will appear displaying all the **VIEWS** on the left-hand side panel.
   a. Documents
      i. AP Invoice Processing
      ii. TCP Documents
   b. Folders
      i. TCP Travel

Document and Folder Views

AP Invoice Processing

a. Click the **AP INVOICE PROCESSING** view and enter in a **Vendor ID** (800#) as shown below:

*Note: [icon] denotes that the document is in workflow being processed; otherwise the document has been processed.

*Note: [icon] denotes that the document is on hold and the departmental Specialists are awaiting additional information to process.

b. To view the desired document, double click the line item to open the document.

c. Press F7 to view the document **PROPERTIES** displayed on the right-hand side panel as shown below. In the **CUSTOM PROPERTIES** section, you can see when the invoice was processed and other detailed information.

d. Once the document is open, you can email, print, or export and save the document file locally, using these icons [icons] .

e. Press the [X] to exit the document and return to the previous list.

TCP Documents

a. Click the **TCP DOCUMENTS** view and enter in a ***Vendor/Traveler ID*** (800#) as shown below:

*Note: denotes that the document is in workflow being processed, otherwise the document has been processed.

*Note: denotes that the document is on hold and the departmental Specialists are awaiting additional information to process.

b. Click the 🔍 button to open the find toolbar at the bottom of the screen. You can perform a more precise search, such as for a **Vendor/Traveler's Document Number** in the list as shown below:

c. To view the desired document, double click the line item to open the document.

d. Press F7 to view the document **PROPERTIES** displayed on the right-hand side panel as shown below. Here you can see all Banner properties and notes, in addition to any annotations.

e. Click the **EXPORT** link or icon to export and save the document locally to your desktop or H: drive.

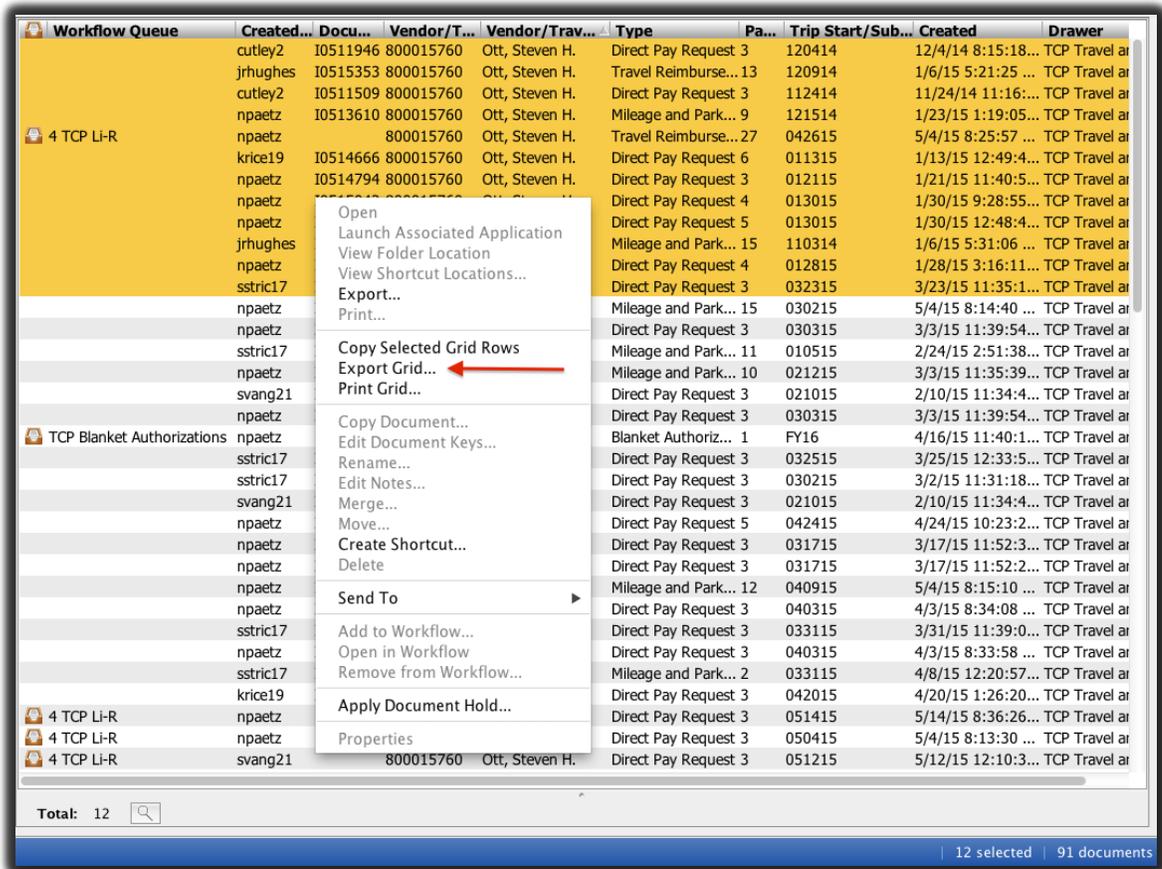f. Press the to exit the document and return to the previous list.

g. To ***EXPORT*** a group of documents in the document grid, highlight the desired documents by clicking the ***SHIFT*** key as shown below:

h. Right-click and select the *EXPORT GRID* option as shown below:

i. An ***EXPORT GRID DATA*** will display as shown below:
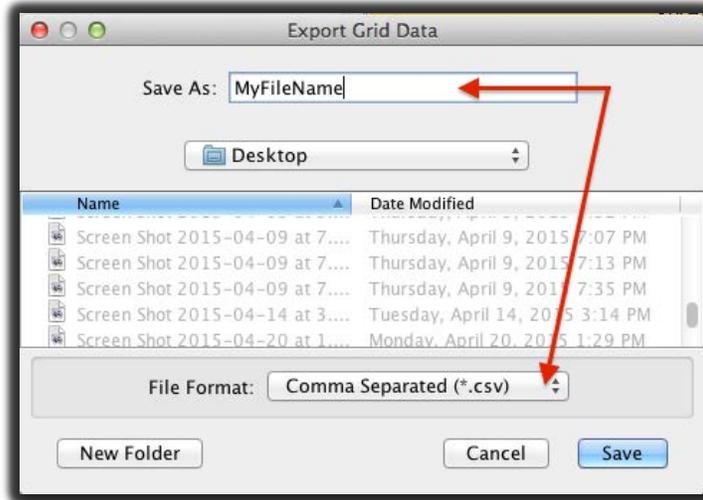
j. Enter in a file name, path, and select ***COMMA SEPARATED (*.csv)*** option and click the ***SAVE*** button. *Note: You will be able to open this file using MS Excel.

k. You will return to the previous document list.

TCP Travel

    a. To view a Vendor/Traveler's FOLDER, click the ***TCP TRAVEL*** folder view and enter in ***Vendor/Traveler's ID*** as shown below:
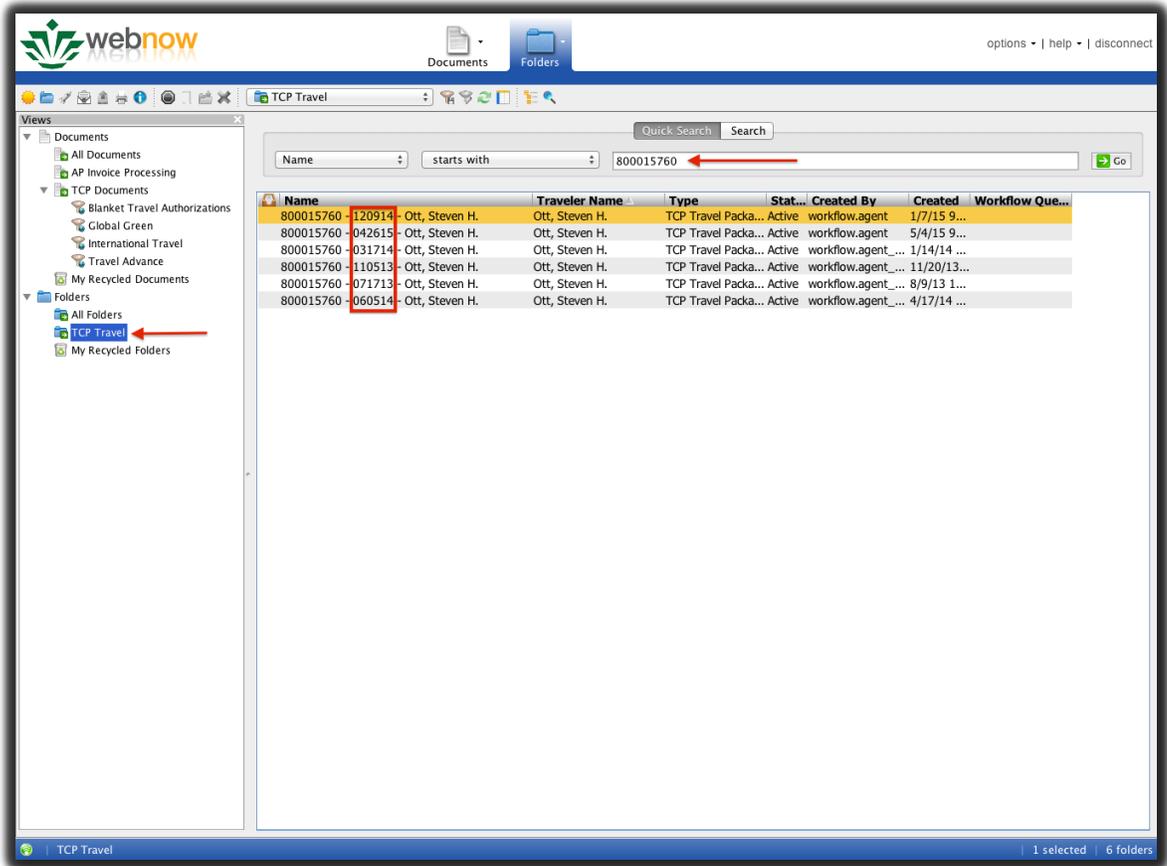
    b. A list of folders, representing each travel date, will appear for the selected Vendor/Traveler's ID as shown above.

    c. Double-click the folder item to open and view all documents associated with that travel date folder.

d. A WebNow Viewer window will display as shown below:
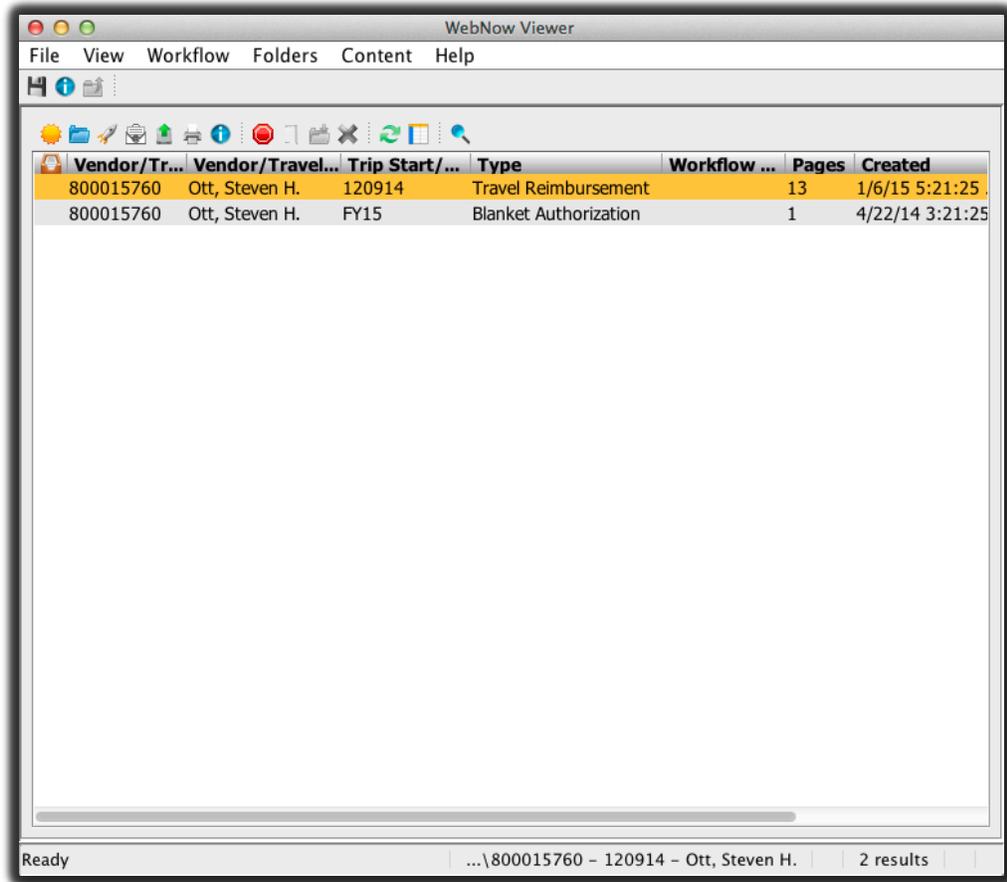
e. Double-click the document item to open and view the contents.

f. Press the to exit the document and/or folder and return to the previous list.

Creating Views called Filters

3. Custom views called filters can be created by clicking the ***SEARCH*** tab at the

   top of the screen, then clicking the ✚ to add a search condition, where you can select a document type, vendor/traveler name, ID, etc. to filter your search as shown below:
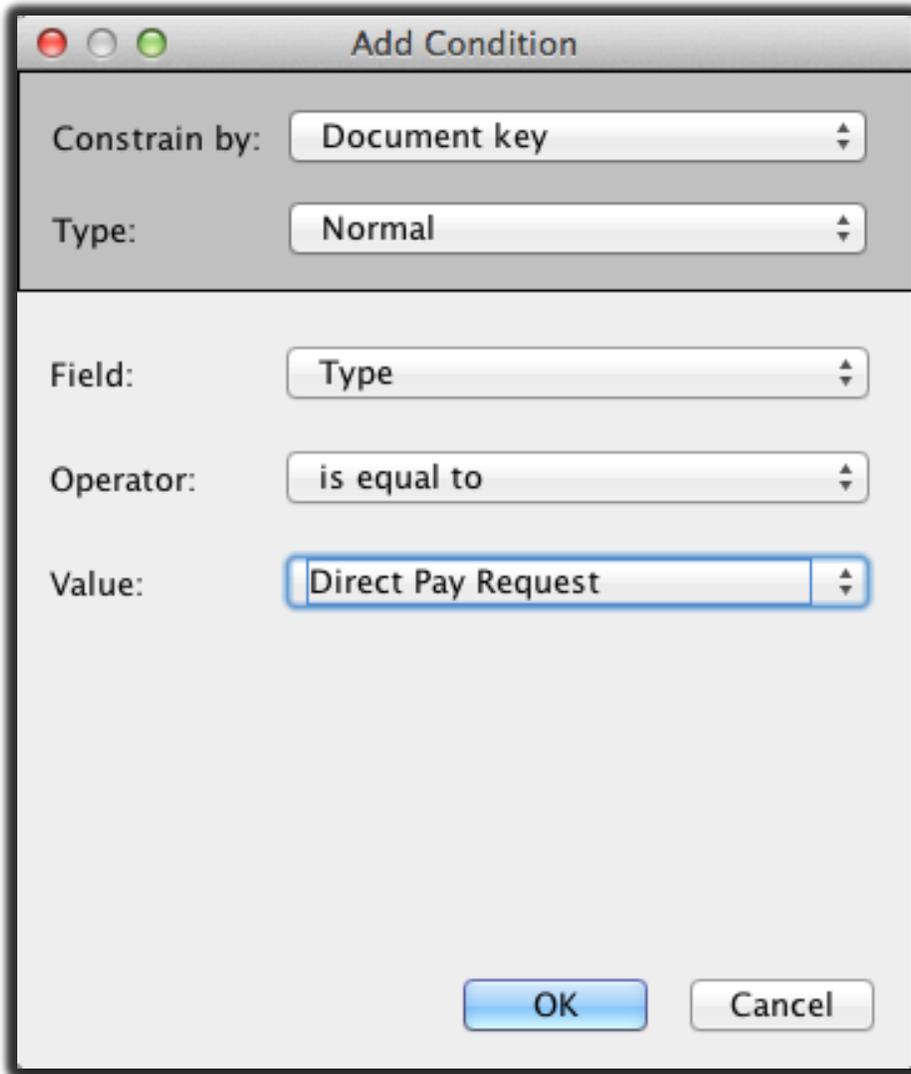
4. After entering in all the criteria for the filter, click the [OK] button to continue.
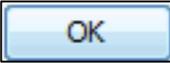
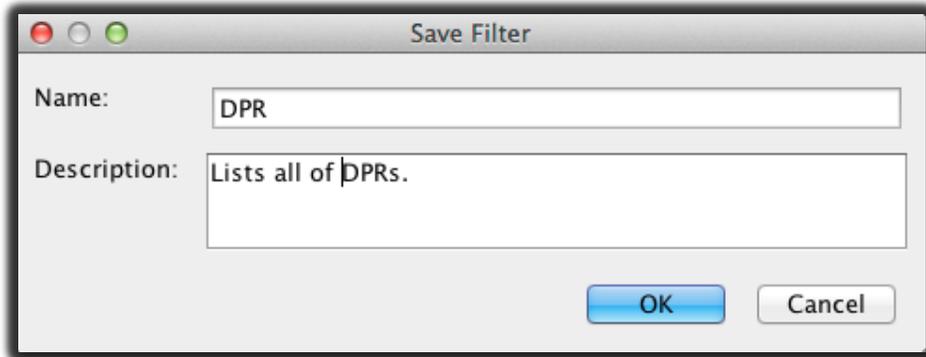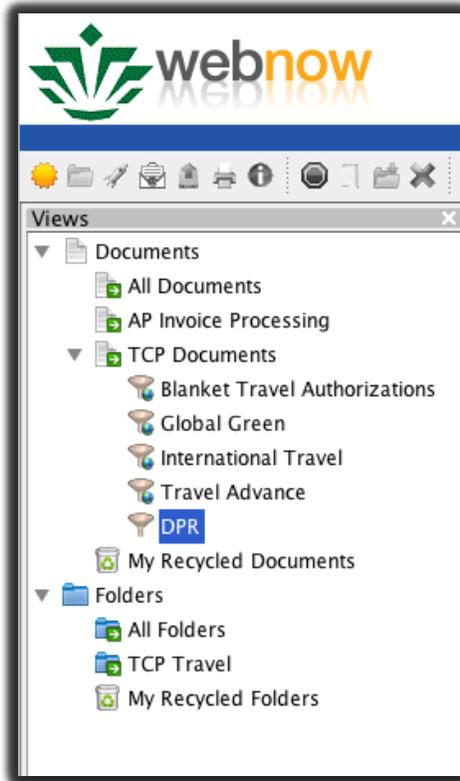5. Click the [→ Go] button to display a list of all the documents the filter criteria matches. Press the [🜄] button to save the filter by entering a filter name and description in the pop-up window as seen below:

6. The custom filter will be listed in the view document list on the left-hand side panel as seen below:

Exiting WebNow

7. To logoff the ImageNow web application, click the DISCONNECT link in the upper right-hand corner of the screen as seen above.