

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 <u>ITS ImageNow Add/Remove Access Request</u>
- 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.
- 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, <u>https://imagenow.uncc.edu/</u>, in the navigation toolbar to display the login screen. Enter your NinerNet credentials and press the CONNECT button as seen below:

| Me | | 2 Proventier |
|---------------|------------|---------------------|
| WebNow | | |
| HEBRON | User name: | |
| | Password: | |
| | | Connect |
| | | |
| | | perceptive software |

- 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



AP Invoice Processing

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

| ► 🖉 🖹 등 🛈 🔘 🗍 🖄 🗶 🗍 | AP Invoice Processing | ÷ % % 2 | | | | | | | |
|---------------------------------|-----------------------|----------------|--------------------|-------------|-------------------------|-------|-------------------|--------------|-----|
| vs × | | | | | | | | | |
| Documents | | | | Quick Sear | Ch Search | | | | |
| All Documents | Vendor ID | \$ starts with | \$ | 800835059 ◀ | | | | | → C |
| TCP Documents | | New Jaw TD | Man day Nama | D | D | Denne | Current | Constant Day | |
| 🔏 Blanket Travel Authorizations | Worknow Que | 800835059 | Airgas USA LLC | 70152408 | Ager Mart PO Invoice | Pages | 12/1/14 12:00:5 c | created By | T |
| 😪 Global Green | | 800835059 | Airgas USA LLC | 20152908 | 49er Mart PO Invoice | 1 | 12/3/14 11:23:0 | wortlov | TI |
| જ International Travel | | 800835059 | Airgas USA LLC | 20152007 | 49er Mart PO Invoice | 1 | 12/3/14 11:22:4 | westley | T |
| 😪 Travel Advance | | 800835059 | Airgas USA LLC | 20152454 | 49er Mart PO Invoice | 1 | 12/19/14 12:29: 0 | westley | T |
| My Recycled Documents | | 800835059 | Airgas USA LLC | 20154020 | 49er Mart PO Invoice | 1 | 12/1/14 12:09:3 | harr170 | T |
| Folders | | 800835059 | Airgas USA LLC | Z0154192 | 49er Mart PO Invoice | 1 | 12/15/14 3:52:4 | westley | TI |
| R All Folders | | 800835059 | Airgas USA LLC | 20150968 | 49er Mart PO Invoice | 1 | 11/17/14 4:28:1 | westley | T |
| TCP Travel | | 800835059 | Airgas USA LLC | 10511158 | AP - Direct Pay Request | 1 | 12/12/14 10·54· r | nsischo | T |
| My Recycled Folders | | 800835059 | Airgas USA LLC | 20151275 | 49er Mart PO Invoice | 1 | 11/20/14 12:06: | westlev | T |
| | | 800835059 | Airgas USA LLC | 70153315 | 49er Mart PO Invoice | 1 | 12/5/14 2:22:27 | westley | T |
| | | 800669236 | Airgas National C. | 20153607 | 49er Mart PO Invoice | 1 | 12/10/14 8:05:1r | nail.agent | T |
| | | 800835059 | Airgas USA LLC | Z0162296 | 49er Mart PO Invoice | 2 | 11/24/14 1:10:2 0 | westlev | T |
| | | 800835059 | Airgas USA LLC | 10509696 | Credit Memo | 1 | 11/24/14 3:46:1 r | nsischo | Т |
| | | 800835059 | Airgas USA LLC | Z0158848 | 49er Mart PO Invoice | 1 | 1/22/15 11:40:4 0 | westlev | TJ |
| | | 800835059 | Airgas USA LLC | Z0153617 | 49er Mart PO Invoice | 1 | 12/10/14 12:15: 0 | westlev | T |
| | | 800835059 | Airgas USA LLC | Z0157630 | 49er Mart PO Invoice | 1 | 1/8/15 8:23:34 0 | westley | T |
| | | 800835059 | Airgas USA LLC | Z0154193 | 49er Mart PO Invoice | 1 | 12/15/14 3:52:4 0 | westley | T |
| | | 800835059 | Airgas USA LLC | Z0154191 | 49er Mart PO Invoice | 1 | 12/15/14 3:52:4 0 | iwestley | T |
| | 🚰 2 AP A-C | | Airgas - Letter | | Default | 7 | 12/12/14 11:53: 0 | westley | т |
| | | 800835059 | Airgas USA LLC | I0509697 | Credit Memo | 1 | 11/24/14 3:37:5 r | nsischo | T |
| | | 800835059 | Airgas USA LLC | Z0153878 | 49er Mart PO Invoice | 1 | 12/11/14 11:57: 0 | lwestley | T |
| | | 800835059 | Airgas USA LLC | I0521416 | AP - Direct Pay Request | 5 | 12/11/14 11:58: c | westley | TI |
| | | 800835059 | Airgas USA LLC | Z0151367 | 49er Mart PO Invoice | 1 | 11/21/14 11:35: c | westley | T |
| | | 800835059 | Airgas USA LLC | Z0153978 | 49er Mart PO Invoice | 1 | 12/12/14 11:53: c | iwestley | T |
| | | 800835059 | Airgas USA LLC | Z0152493 | 49er Mart PO Invoice | 1 | 12/3/14 11:22:4 0 | iwestley | T |
| | | 800835059 | Airgas USA LLC | Z0153147 | 49er Mart PO Invoice | 1 | 12/5/14 2:22:27 0 | iwestley | T |
| | | 800835059 | Airgas USA LLC | I0518936 | AP - Direct Pay Request | 6 | 12/5/14 2:22:12 0 | iwestley | T |
| | | 800835059 | Airgas USA LLC | Z0153319 | 49er Mart PO Invoice | 1 | 12/8/14 2:11:11 0 | iwestley | T |
| | | 800835059 | Airgas USA LLC | Z0161647 | 49er Mart PO Invoice | 2 | 1/5/15 4:09:15 j | painter | T |
| | | 800835059 | Airgas USA LLC | Z0151556 | 49er Mart PO Invoice | 1 | 11/21/14 11:35: c | iwestley | T |
| | | 800835059 | Airgas USA LLC | Z0153635 | 49er Mart PO Invoice | 1 | 12/10/14 12:15: c | lwestley | TJ |
| | | 800835059 | Airgas USA LLC | Z0153875 | 49er Mart PO Invoice | 1 | 12/11/14 11:57: 0 | lwestley | TI |
| | | 800835059 | Airgas USA LLC | Z0153958 | 49er Mart PO Invoice | 1 | 12/11/14 11:57: c | iwestley | TI |
| | | 800835059 | Airgas USA LLC | Z0152173 | 49er Mart PO Invoice | 1 | 11/26/14 10:52: c | harr170 | TI |
| | | 800835059 | Airgas USA LLC | Z0151351 | 49er Mart PO Invoice | 1 | 11/20/14 12:06: 0 | iwestley | TI |
| | | 800835059 | Airgas USA LLC | Z0159405 | 49er Mart PO Invoice | 2 | 12/2/14 10:36:2 r | nsischo | TI |

***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. 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 righthand side panel as shown below. In the *CUSTOM PROPERTIES* section, you can see when the invoice was processed and other detailed information.

| 00 | _ | WebNow Viewer | |
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| File View Annotation Workflow | Folders Window Help | | |
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| Actions × | \varTheta 🔿 🔿 🔛 Paç | ge 1 – TIF File | Properties |
| Document 🛞 | | | Programment Kover |
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| Export this docume | Chartwells | Invoice | Drawer |
| Print this document | Eat-Learn-Live | Invice Number 2351600323 | AP Invoice Processing 💠 |
| Create a shortcut to | 320 E. Sth Street | Invoice Date: 5/12/2015 Department: Catering | Name |
| Apply document held | Charlotte NC 28202 | Custamer Number: F236160000 | 321YZ5D_016Y7SLLR000PCD |
| Apply document hold | Bill To: UNCC Center City 320 E. Sh Street | Remit To: Chartwells Dining Services | Vendor ID |
| view shortcut locati | Charlotte NC 28202 | PO Box 417632 | 800362179 |
| A Launch associated a | | Boston MA 02241-7632 | Vendor Name |
| | Note: 26163 / P1526646 | | Chartwells |
| | Ref Nr Event Date Event Catering Location 85225 5/12/2015 26163 / P1525546 CCB | Description Quantity Unit Price Amount Catering 1.00 \$85.8300 \$85.83 | Document # |
| | | | Z0172446 |
| | | | Field4 |
| | | | fields |
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| | | | Type |
| | | | 49er Mart PO Invoice |
| | | Sub-Total (Non-Taxable) \$85.93 | More |
| | | Sub-Total (Taxable) \$0.00 Sales Tax \$0.00 | |
| | | Total \$85.93 Advanced Deposit Used \$0.00 Credit Card \$0.00 | 🧏 Custom Properties 🛞 |
| | | Cash Payment \$0.00 Refund \$0.00 | Document Num Z0172446 |
| | Due on Recei | vipt Balance Due \$85.93 | Supplier Invoice 2361600323 |
| | Pag | ge tof 1 | Purchase Order P1526546 |
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| AP Invoice Processing \ 8 | 300362179 \ Chartwells \ Z0172446 \ | \ 321YZ5D_016Y8CLLR000PB2 \ 49er Mart PO | Invoice Page 1 of 1 1,628,570 K |

d. Once the document is open, you can email, print, or export and save

the document file locally, using these icons

e. Press the **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:

| Webnow | De | D - | Folders | | | | c | pptions • help • | disconnect |
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| all Documents | Vendor/Traveler ID | starts w | vith | * 800015760 | | | | | |
| AP Invoice Processing | vendor/ maveler iD + | starts v | nun | * 800015760 | · · · · · · · · · · · · · · · · · · · | | | | C 0 |
| TCP Documents | | | | | | | | | |
| Blanket Travel Authorizations | Workflow Q 🔘 Created | Docume | . Vendor/Trav | . Vendor/Traveler | Document Type | Pages | Trip Start/Sub | . Created | Draw |
| 😴 Global Green | cutley2 | I0511946 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 120414 | 12/4/14 8:15:18. | TCP Tr |
| 😪 International Travel | jrnugnes | 10515353 | 800015760 | Ott, Steven H. | Travel Reimbursem | 13 | 120914 | 1/6/15 5:21:25 | TCP In |
| Travel Advance | cutley2 | 10511509 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 112414 | 11/24/14 11:16: | ICP Ir. |
| My Recycled Documents | npaetz | 10513610 | 800015760 | Ott, Steven H. | Mileage and Parking | 9 | 121514 | 1/23/15 1:19:05. | TCP Ir. |
| 🔻 🧰 Folders | 4 TCP LI-R npaetz | 10514666 | 800015760 | Ott, Steven H. | Diravel Reimbursem | 27 | 042615 | 5/4/15 8:25:57 | TCP In |
| The All Folders | Krice19 | 10514666 | 800015760 | Ott, Steven H. | Direct Pay Request | 6 | 011315 | 1/13/15 12:49:4. | TCP Ir. |
| | npaetz | 10514794 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 012115 | 1/21/15 11:40:5. | TCP Ir |
| Wy Recycled Folders | npaetz | 10515042 | 800015760 | Ott, Steven H. | Direct Pay Request | 4 | 013015 | 1/30/15 9:28:55. | TCD Tr |
| a my necycled robers | npaetz | 10515044 | 800015760 | Ott, Steven H. | Direct Pay Request | 5 | 110214 | 1/50/15 12:48:4. | TCP IF |
| | jrnugnes | 10513185 | 800015760 | Ott, Steven H. | Mileage and Parking | 15 | 012815 | 1/0/15 5:31:00 | TCP IF |
| | npaetz ostrie17 | 10515013 | 800015760 | Ott, Steven H. | Direct Pay Request | 4 | 012815 | 2/22/15 3:10:11. | TCD Tr |
| | SSUIC17 | 10520701 | 800015760 | Ott, Steven H. | Milesse and Darking | 15 | 032315 | 5/25/15 11:55:1. | TCP Tr |
| | npaetz | 10521854 | 800015760 | Ott, Steven H. | Direct Dry Request | 15 | 030215 | 3/4/15 8:14:40 | TCP II |
| | npaetz ostrie17 | 1051/00/ | 800015760 | Ott, Steven H | Mileago and Barking | 3 | 010515 | 3/3/15 11:39:54. | TCP Tr |
| | 5501017 | 10510778 | 800015760 | Ott, Steven H | Mileage and Parking | 10 | 021215 | 2/2/15 11:25:20 | TCP Tr |
| | npaetz | 10517203 | 800015760 | Ott, Steven H | Direct Bay Request | 2 | 021215 | 2/10/15 11:23:39. | TCP Tr |
| | SVdig21 | 10513643 | 800015760 | Ott, Steven H | Direct Pay Request | 3 | 020215 | 2/2/15 11:20:54 | TCP Tr |
| | TCB Blanket A prostz | 10517008 | 800015760 | Ott, Steven H | Planket Authorization | 1 | 50515 EV16 | 4/16/15 11:39:34. | TCP Tr |
| | ortric17 | 10520888 | 800015760 | Ott, Steven H | Direct Pay Request | 3 | 022515 | 2/25/15 12:22:5 | TCP Tr |
| | sstric17 | 10520888 | 800015760 | Ott, Steven H | Direct Pay Request | 3 | 030215 | 3/2/15 11:31:18 | TCP Tr |
| | svano21 | 10515842 | 800015760 | Ott Steven H | Direct Pay Request | 3 | 021015 | 2/10/15 11:34:4 | TCP Tr |
| | nnaetz | 10522968 | 800015760 | Ott Steven H | Direct Pay Request | 5 | 042415 | 4/24/15 10:23:2 | TCP Tr |
| | npaetz | 10518835 | 800015760 | Ott Steven H | Direct Pay Request | 3 | 031715 | 3/17/15 11:52:3 | TCP Tr |
| | npaetz | 10518834 | 800015760 | Ott. Steven H. | Direct Pay Request | 3 | 031715 | 3/17/15 11:52:3 | TCP Tr |
| | npaetz | 10521855 | 800015760 | Ott Steven H | Mileage and Parking | 12 | 040915 | 5/4/15 8:15:10 | TCP Tr. |
| | npaetz | 10521258 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 040315 | 4/3/15 8:34:08 | TCP Tr |
| | sstric17 | 10520961 | 800015760 | Ott Steven H | Direct Pay Request | 3 | 033115 | 3/31/15 11:39:0 | TCP Tr |
| | nnaetz | 10521257 | 800015760 | Ott. Steven H. | Direct Pay Request | 3 | 040315 | 4/3/15 8:33:58 | TCP Tr |
| | sstric17 | 10519647 | 800015760 | Ott Steven H | Mileage and Parking | 2 | 033115 | 4/8/15 12:20:57 | TCP Tr |
| | krice19 | 10522835 | 800015760 | Ott. Steven H. | Direct Pay Request | 3 | 042015 | 4/20/15 1:26:20 | TCP Tr |
| | 4 TCP Li-R npaetz | 10022000 | 800015760 | Ott. Steven H. | Direct Pay Request | 3 | 051415 | 5/14/15 8:36:26. | TCP Tr |
| | 4 TCP Li-R npaetz | | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 050415 | 5/4/15 8:13:30 | TCP Tr |
| | 4 TCP Li-R svang21 | | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 051215 | 5/12/15 12:10:3. | TCP Tr |
| | | | | | | - | | | |
| Тс | otal: 91 🔍 | | | ¢ | | | | | |
| | | | | | | | | | |
| 🛜 TCP Documents | | _ | | | | | | 1 selected 91 | documents |

*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 source 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:

| | | | B | - | | | | | | |
|---------------------------------|--------------------|----------|----------------|----------------|-------------------|-----------------------|-------|----------------|-------------------|------------|
| WEBISW | | Do | cuments | Folders | | | | C | ptions • help • | disconnect |
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| 😪 Global Green | | cutley2 | 10511946 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 120414 | 12/4/14 8:15:18. | TCP Ir |
| 😪 International Travel | | Jrnugnes | 10515353 | 800015760 | Ott, Steven H. | Diract Day Request | 13 | 120914 | 1/0/15 5:21:25 | TCP IF |
| 🐨 Travel Advance | | nnaetz | 10511509 | 800015760 | Ott, Steven H | Mileage and Parking | 0 | 12414 | 1/22/15 1.10.05 | TCP Tr |
| My Recycled Documents | | npaetz | 10515010 | 800015760 | Ott, Steven H | Travel Reimbursem | 27 | 042615 | 5/4/15 8:25:57 | TCP Tr |
| 🔻 🚞 Folders | | krice19 | 10514666 | 800015760 | Ott, Steven H | Direct Pay Request | 6 | 011315 | 1/13/15 12:49:4 | TCP Tr |
| all Folders | | nnaetz | 10514704 | 800015760 | Ott, Steven H | Direct Pay Request | 3 | 012115 | 1/21/15 11:40:5 | TCP Tr |
| TCP Travel | | nnaetz | 10515042 | 800015760 | Ott Steven H | Direct Pay Request | 4 | 013015 | 1/30/15 9.28.55 | TCP Tr |
| My Recycled Folders | | npaetz | 10515044 | 800015760 | Ott, Steven H. | Direct Pay Request | 5 | 013015 | 1/30/15 12:48:4 | TCP Tr |
| | | irhughes | 10513185 | 800015760 | Ott, Steven H. | Mileage and Parking | 15 | 110314 | 1/6/15 5:31:06 | TCP Tr |
| | | npaetz | I0515013 | 800015760 | Ott, Steven H. | Direct Pay Request | 4 | 012815 | 1/28/15 3:16:11. | TCP Tr |
| | | sstric17 | I0520701 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 032315 | 3/23/15 11:35:1. | TCP Tr |
| | | npaetz | I0521854 | 800015760 | Ott, Steven H. | Mileage and Parking | 15 | 030215 | 5/4/15 8:14:40 | TCP Tr |
| | | npaetz | 10517667 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 030315 | 3/3/15 11:39:54. | TCP Tr |
| | | sstric17 | I0516778 | 800015760 | Ott, Steven H. | Mileage and Parking | 11 | 010515 | 2/24/15 2:51:38. | TCP Tr |
| ~ | | npaetz | I0517265 | 800015760 | Ott, Steven H. | Mileage and Parking | 10 | 021215 | 3/3/15 11:35:39. | TCP Tr |
| | | svang21 | I0515843 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 021015 | 2/10/15 11:34:4. | TCP Tr |
| | | npaetz | I0517668 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 030315 | 3/3/15 11:39:54. | TCP Tr |
| | 🚰 TCP Blanket A | npaetz | | 800015760 | Ott, Steven H. | Blanket Authorization | 1 | FY16 | 4/16/15 11:40:1. | TCP Tr |
| | | sstric17 | 10520888 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 032515 | 3/25/15 12:33:5. | TCP Tr |
| | | sstric17 | I0517388 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 030215 | 3/2/15 11:31:18. | TCP Tr |
| | | svang21 | I0515842 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 021015 | 2/10/15 11:34:4. | TCP Tr |
| | | npaetz | 10522968 | 800015760 | Ott, Steven H. | Direct Pay Request | 5 | 042415 | 4/24/15 10:23:2. | TCP Tr |
| | | npaetz | I0518835 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 031715 | 3/17/15 11:52:3. | TCP Tr |
| | | npaetz | I0518834 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 031715 | 3/17/15 11:52:2. | TCP Tr |
| | | npaetz | I0521855 | 800015760 | Ott, Steven H. | Mileage and Parking | 12 | 040915 | 5/4/15 8:15:10 | . TCP Tr |
| | | npaetz | I0521258 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 040315 | 4/3/15 8:34:08 | . TCP Tr |
| | | sstric17 | I0520961 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 033115 | 3/31/15 11:39:0. | TCP Tr |
| | | npaetz | 10521257 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 040315 | 4/3/15 8:33:58 | . TCP Tr |
| | | sstric17 | 10519647 | 800015760 | Ott, Steven H. | Mileage and Parking | 2 | 033115 | 4/8/15 12:20:57. | TCP Tr |
| | | krice19 | 10522835 | 800015760 | Ott, Steven H. | Direct Pay Request | 3 | 042015 | 4/20/15 1:26:20. | TCP Tr |
| | M 4 TCP LI-R | npaetz | | 800015760 | Ott, Steven H. | Direct Pay Request | 5 | 051415 | 5/14/15 8:36:26. | ICP II |
| | Total: 91 🔍 | | / | | ^ | | | | | |
| | 8 Find: 10517667 | - | | Next 🔺 Previou | s Results: 1 of 1 | | | | | |
| TCP Documents | | | | | | | | | 1 selected 91 | documents |

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 righthand side panel as shown below. Here you can see all Banner properties and notes, in addition to any annotations.

| ⊖ ⊖ ⊖ WebNow Viewer | |
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| C Interpret Andre Speller Providence Statutes (Internet Linker) C Scharbergforgeforder Scharber Scharber (Internet Linker) (attach Scharberrich Andre Linker - see Tali) C Other Speller | Document# |
| Autoration (internation Autorated Egenture Invested Date Invested Egenture) Index of Egentures Autorated Egenture | 10517667 |
| 1347756 451360 304 | Trip Start/Submitted Date |
| | 030315 |
| | Field5 |
| | 321YZ33_014K60SNW0003QZ |
| Com Sub Information (in Verda/Continue of Antique) Seteration Series Headrandy None or Science (1)(6) 1440 \$35.2 | Type |
| L <mark>wich 위비 대는 Flanagen</mark> to discuss the Board of Advisors meeting | Direct Pay Request |
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| pine standalong Californi Middau Per Perel on oldy Sector Per Perel on oldy Sector Per Perel on oldy The Laborative sector Perel | Custom Proportion |
| / JCSS VILL / BCOB-Deam's Office (5550) | |
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| | Properties |
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| and Complex Payments \ 800015760 \ Ott, Steven H. \ 10517667 \ 030315 \ 321YZ33_014K60SNW0003QZ \ Direct Pay R | equest Page 1 of 3 1,583,360 K |

- 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:

| webnow | | Document: | s Folders | | | | options - help - | disconnect |
|--|----------------------------|---------------------|--------------------|----------------|----------------------|-----------------|---|------------|
| ;==:/@:1:=:*(0:::::::::::::::::::::::::::::::::: | TCP Documents | 88 | 2 🗖 🎏 🔍 | | | | | |
| Views × | | | | Ouick Search | Search | | | |
| Documents | | | | | | | | |
| AP Invoice Processing | Vendor/Traveler ID | \$ sta | irts with | \$ 800015760 | | | | → Go |
| TCP Documents | | | | | | | | |
| 😪 Blanket Travel Authorizations | Workflow Queue | Created. | Docu Vendor/T | Vendor/Trav | Type Pa | Trip Start/Sub. | Created Drav | wer |
| 😪 Global Green | | cutley2 | 10511946 800015760 | Ott, Steven H. | Direct Pay Request 3 | 120414 | 12/4/14 8:15:18 TCP I | ravel ar |
| જ International Travel | | Jinugnes | 10515555 800015760 | Ott, Steven H | Direct Pay Request 3 | 120914 | 1/0/15 5:21:25 TCP I | Travel at |
| 😪 Travel Advance | | nnaetz | 10513610 800015760 | Ott Steven H | Mileage and Park 9 | 121514 | 1/23/15 1·19·05 TCP T | Travel ar |
| My Recycled Documents | 🔁 4 TCP Li-R | npaetz | 800015760 | Ott, Steven H. | Travel Reimburse 27 | 042615 | 5/4/15 8:25:57 TCP T | Travel ar |
| ▼ 🛅 Folders | | krice19 | 10514666 800015760 | Ott, Steven H. | Direct Pay Request 6 | 011315 | 1/13/15 12:49:4 TCP T | Fravel ar |
| Call Folders | | npaetz | I0514794 800015760 | Ott, Steven H. | Direct Pay Request 3 | 012115 | 1/21/15 11:40:5 TCP T | Fravel ar |
| TCP Travel | | npaetz | I0515042 800015760 | Ott, Steven H. | Direct Pay Request 4 | 013015 | 1/30/15 9:28:55 TCP T | Fravel ar |
| My Recycled Folders | | npaetz | 10515044 800015760 | Ott, Steven H. | Direct Pay Request 5 | 013015 | 1/30/15 12:48:4 TCP T | Fravel ar |
| | | jrhughes | 10513185 800015760 | Ott, Steven H. | Mileage and Park 15 | 110314 | 1/6/15 5:31:06 TCP T | Fravel ar |
| | | npaetz | 10515013 800015760 | Ott, Steven H. | Direct Pay Request 4 | 012815 | 1/28/15 3:16:11 TCP T | Fravel ar |
| | | sstric17 | 10520701 800015760 | Ott, Steven H. | Direct Pay Request 3 | 032315 | 3/23/15 11:35:1 TCP T | Travel a |
| | | npaetz | 10521854 800015760 | Ott, Steven H. | Mileage and Park 15 | 030215 | 5/4/15 8:14:40 TCP I | Travel ar |
| | | ripaetz cetric17 | 1051/00/ 000015/00 | Ott, Steven H | Mileage and Bark 11 | 010515 | 2/24/15 2:51:29 TCP T | Travel at |
| | | nnaetz | 10517265 800015760 | Ott, Steven H | Mileage and Park 10 | 021215 | 3/3/15 11:35:39 TCP T | Travel ar |
| r | | svang21 | 10515843 800015760 | Ott, Steven H. | Direct Pay Request 3 | 021015 | 2/10/15 11:34:4 TCP T | Travel ar |
| | | npaetz | 10517668 800015760 | Ott, Steven H. | Direct Pay Request 3 | 030315 | 3/3/15 11:39:54 TCP T | Travel ar |
| | TCP Blanket Authorizations | npaetz | 800015760 | Ott, Steven H. | Blanket Authoriz 1 | FY16 | 4/16/15 11:40:1 TCP T | Travel ar |
| | | sstric17 | I0520888 800015760 | Ott, Steven H. | Direct Pay Request 3 | 032515 | 3/25/15 12:33:5 TCP T | Fravel ar |
| | | sstric17 | I0517388 800015760 | Ott, Steven H. | Direct Pay Request 3 | 030215 | 3/2/15 11:31:18 TCP T | Fravel ar |
| | | svang21 | I0515842 800015760 | Ott, Steven H. | Direct Pay Request 3 | 021015 | 2/10/15 11:34:4 TCP T | Travel ar |
| | | npaetz | I0522968 800015760 | Ott, Steven H. | Direct Pay Request 5 | 042415 | 4/24/15 10:23:2 TCP T | Travel ar |
| | | npaetz | I0518835 800015760 | Ott, Steven H. | Direct Pay Request 3 | 031715 | 3/17/15 11:52:3 TCP T | Fravel ar |
| | | npaetz | I0518834 800015760 | Ott, Steven H. | Direct Pay Request 3 | 031715 | 3/17/15 11:52:2 TCP T | Fravel ar |
| | | npaetz | 10521855 800015760 | Ott, Steven H. | Mileage and Park 12 | 040915 | 5/4/15 8:15:10 TCP T | Travel ar |
| | | npaetz | 10521258 800015760 | Ott, Steven H. | Direct Pay Request 3 | 040315 | 4/3/15 8:34:08 TCP I | Travel ar |
| | | sstric1/ | 10520901 800015760 | Ott, Steven H. | Direct Pay Request 3 | 040315 | 3/31/15 11:39:0 TCP 1 4/3/15 8:33:58 TCP 1 | Travel ar |
| | | setric17 | 10519647 800015760 | Ott, Steven H | Mileage and Park 2 | 033115 | 4/8/15 12:20:57 TCP T | Travel at |
| | | krice19 | 10522835 800015760 | Ott, Steven H. | Direct Pay Request 3 | 042015 | 4/20/15 1:26:20 TCP T | Travel ar |
| | 4 TCP Li-R | npaetz | 800015760 | Ott, Steven H. | Direct Pay Request 3 | 051415 | 5/14/15 8:36:26 TCP T | Travel ar |
| | 🚰 4 TCP LI-R | npaetz | 800015760 | Ott, Steven H. | Direct Pay Request 3 | 050415 | 5/4/15 8:13:30 TCP T | Fravel ar |
| | 🚰 4 TCP Li-R | svang21 | 800015760 | Ott, Steven H. | Direct Pay Request 3 | 051215 | 5/12/15 12:10:3 TCP T | Travel ar |
| | Total: 12 | | | ^ | | | | P |
| 🦁 TCP Documents | | | | | | | 12 selected 91 | documents |



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

| Workflow Queue | Created | . Docu Vendor/T | . Vendor/Trav | Type Pa | Trip Start/Sub. | Created | Drawer |
|--------------------------------|----------|---------------------|--------------------|----------------------|-----------------|-----------------|---------------|
| | cutley2 | I0511946 800015760 | Ott, Steven H. | Direct Pay Request 3 | 120414 | 12/4/14 8:15:18 | TCP Travel ar |
| | jrhughes | I0515353 800015760 | Ott, Steven H. | Travel Reimburse13 | 120914 | 1/6/15 5:21:25 | TCP Travel ar |
| | cutley2 | I0511509 800015760 | Ott, Steven H. | Direct Pay Request 3 | 112414 | 11/24/14 11:16: | TCP Travel ar |
| | npaetz | I0513610 800015760 | Ott, Steven H. | Mileage and Park 9 | 121514 | 1/23/15 1:19:05 | TCP Travel ar |
| 🔁 4 TCP Li-R | npaetz | 800015760 | Ott, Steven H. | Travel Reimburse27 | 042615 | 5/4/15 8:25:57 | TCP Travel ar |
| | krice19 | I0514666 800015760 | Ott, Steven H. | Direct Pay Request 6 | 011315 | 1/13/15 12:49:4 | TCP Travel ar |
| | npaetz | I0514794 800015760 | Ott, Steven H. | Direct Pay Request 3 | 012115 | 1/21/15 11:40:5 | TCP Travel ar |
| | npaetz | | ou or | Direct Pay Request 4 | 013015 | 1/30/15 9:28:55 | TCP Travel ar |
| | npaetz | Open | L A un ultra di un | Direct Pay Request 5 | 013015 | 1/30/15 12:48:4 | TCP Travel ar |
| | jrhughes | Launch Associated | Application | Mileage and Park 15 | 110314 | 1/6/15 5:31:06 | TCP Travel ar |
| | npaetz | View Shortcut Local | on | Direct Pay Request 4 | 012815 | 1/28/15 3:16:11 | TCP Travel ar |
| | sstric17 | Export | ations | Direct Pay Request 3 | 032315 | 3/23/15 11:35:1 | TCP Travel ar |
| | npaetz | Print | | Mileage and Park 15 | 030215 | 5/4/15 8:14:40 | TCP Travel ar |
| | npaetz | | | Direct Pay Request 3 | 030315 | 3/3/15 11:39:54 | TCP Travel ar |
| | sstric17 | Copy Selected Grid | Rows | Mileage and Park 11 | 010515 | 2/24/15 2:51:38 | TCP Travel ar |
| | npaetz | Export Grid 🗲 | | Mileage and Park 10 | 021215 | 3/3/15 11:35:39 | TCP Travel ar |
| | svang21 | Print Grid | | Direct Pay Request 3 | 021015 | 2/10/15 11:34:4 | TCP Travel ar |
| | npaetz | Conv Document | | Direct Pay Request 3 | 030315 | 3/3/15 11:39:54 | TCP Travel ar |
| 🛯 🌇 TCP Blanket Authorizations | npaetz | Edit Document Key | /5 | Blanket Authoriz 1 | FY16 | 4/16/15 11:40:1 | TCP Travel ar |
| | sstric17 | Rename | | Direct Pay Request 3 | 032515 | 3/25/15 12:33:5 | TCP Travel ar |
| | sstric17 | Edit Notes | | Direct Pay Request 3 | 030215 | 3/2/15 11:31:18 | TCP Travel ar |
| | svang21 | Merge | | Direct Pay Request 3 | 021015 | 2/10/15 11:34:4 | TCP Travel ar |
| | npaetz | Move | | Direct Pay Request 5 | 042415 | 4/24/15 10:23:2 | TCP Travel ar |
| | npaetz | Create Shortcut | | Direct Pay Request 3 | 031715 | 3/17/15 11:52:3 | TCP Travel ar |
| | npaetz | Delete | | Direct Pay Request 3 | 031715 | 3/17/15 11:52:2 | TCP Travel ar |
| | npaetz | Sand To | | Mileage and Park 12 | 040915 | 5/4/15 8:15:10 | TCP Travel ar |
| | npaetz | Sellu To | | Direct Pay Request 3 | 040315 | 4/3/15 8:34:08 | TCP Travel ar |
| | sstric17 | Add to Workflow | | Direct Pay Request 3 | 033115 | 3/31/15 11:39:0 | TCP Travel ar |
| | npaetz | Open in Workflow | | Direct Pay Request 3 | 040315 | 4/3/15 8:33:58 | TCP Travel ar |
| | sstric17 | Remove from Worl | kflow | Mileage and Park 2 | 033115 | 4/8/15 12:20:57 | TCP Travel ar |
| | krice19 | Apply Document H | lold | Direct Pay Request 3 | 042015 | 4/20/15 1:26:20 | TCP Travel ar |
| 🚰 4 TCP Li-R | npaetz | Apply Document | 1010 | Direct Pay Request 3 | 051415 | 5/14/15 8:36:26 | TCP Travel ar |
| 🛯 🚰 4 TCP Li-R | npaetz | Properties | | Direct Pay Request 3 | 050415 | 5/4/15 8:13:30 | TCP Travel ar |
| 🚰 4 TCP Li-R | svang21 | 800015760 | Ott, Steven H. | Direct Pay Request 3 | 051215 | 5/12/15 12:10:3 | TCP Travel ar |
| | | | | | | | |
| Total: 12 | | | | | | | |
| | | | | | | 12 selected | 91 documents |



i. An *EXPORT GRID DATA* will display as shown below:

| Save | As: MyFileName | |
|---------------|----------------|---------------------------------|
| | 📄 Desktop | |
| Name | | Date Modified |
| Screen Shot 2 | 015-04-09 at 7 | Thursday, April 9, 2015 7:07 PM |
| Screen Shot 2 | 015-04-09 at 7 | Thursday, April 9, 2015 7:13 PM |
| Screen Shot 2 | 015-04-09 at 7 | Thursday, April 9, 2011 7:35 PM |
| Screen Shot 2 | 015-04-14 at 3 | Tuesday, April 14, 2015 3:14 PM |
| Screen Shot 2 | 015-04-20 at 1 | Monday, April 20, 2015 1:29 PM |
| File | Format: Comma | Separated (*.csv) |
| | | |
| New Folder | | Cancel Save |

- 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:

| webnow | Documents | Folders | | options - help - disconnect |
|-------------------------------|--|--------------------------|--|---------------------------------|
| | 💼 TCP Travel 🕴 😭 🕫 🖉 [|] ¦ E < | | |
| Views | | | | |
| V Documents | | | Quick Search Search | |
| all Documents | Name \$ starts with | \$ 8000 | 15760 🚽 | → Go |
| TCR Documents | | | | |
| Blanket Travel Authorizations | Name | Traveler Name | Type Stat Created By Created | Workflow Que |
| Global Green | 800015760 - 120914 - Ott, Steven H. | Ott, Steven H. | TCP Travel Packa Active workflow.agent 1/7/15 9 | |
| 😪 International Travel | 800015760 - 042615 - Ott, Steven H. 800015760 - 031714 - Ott, Steven H. | Ott, Steven H. | TCP Travel Packa Active workflow.agent 5/4/15 9 | |
| 😪 Travel Advance | 800015760 - 051714 - Ott, Steven H | Ott, Steven H | TCP Travel Packa Active workflow.agent1/14/14 TCP Travel Packa Active workflow.agent1/20/13 | |
| My Recycled Documents | 800015760 - 071713 - Ott, Steven H. | Ott, Steven H. | TCP Travel Packa Active workflow.agent 8/9/13 1 | |
| ▼ 🛅 Folders | 800015760 - 060514 - Ott, Steven H. | Ott, Steven H. | TCP Travel Packa Active workflow.agent 4/17/14 | |
| My Recycled Folders | | | | |
| TCP Travel | | | | 1 selected 6 folders |

- 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

to add a search condition, where top of the screen, then clicking the you can select a document type, vendor/traveler name, ID, etc. to filter your search as shown below:

| Constrain by:Document key\$Type:Normal\$Field:Type\$Operator:is equal to\$Value:Direct Pay Request\$ | 00 | Add Condition | |
|--|---------------|--------------------|-------|
| Type:Normal\$Field:Type\$Operator:is equal to\$Value:Direct Pay Request\$ | Constrain by: | Document key | ÷ |
| Field: Type Operator: is equal to Value: Direct Pay Request | Type: | Normal | ÷ |
| Operator: is equal to \ddagger Value: Direct Pay Request \ddagger | Field: | Туре | \$ |
| Value: Direct Pay Request \$ | Operator: | is equal to | \$ |
| | Value: | Direct Pay Request | ÷ |
| | | | |
| | | | |
| | | | |
| OK Cancel | | ОК Са | incel |

4. continue.



criteria matches. Press the button to save the filter by entering a filter

name and description in the pop-up window as seen below:

| $\Theta \cap \Theta$ | Save Filter |
|----------------------|--------------------|
| Name: | DPR |
| Description: | Lists all of DPRs. |
| | OK Cancel |

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

| webnew | |
|--|--|
| ;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;; | |
| Views × | |
| 🔻 📄 Documents | |
| all Documents | |
| a P Invoice Processing | |
| TCP Documents | |
| જ Blanket Travel Authorizations | |
| જ Global Green | |
| જ International Travel | |
| જ Travel Advance | |
| PR DPR | |
| My Recycled Documents | |
| 🔻 🚞 Folders | |
| 💼 All Folders | |
| 💼 TCP Travel | |
| My Recycled Folders | |
| | |



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.