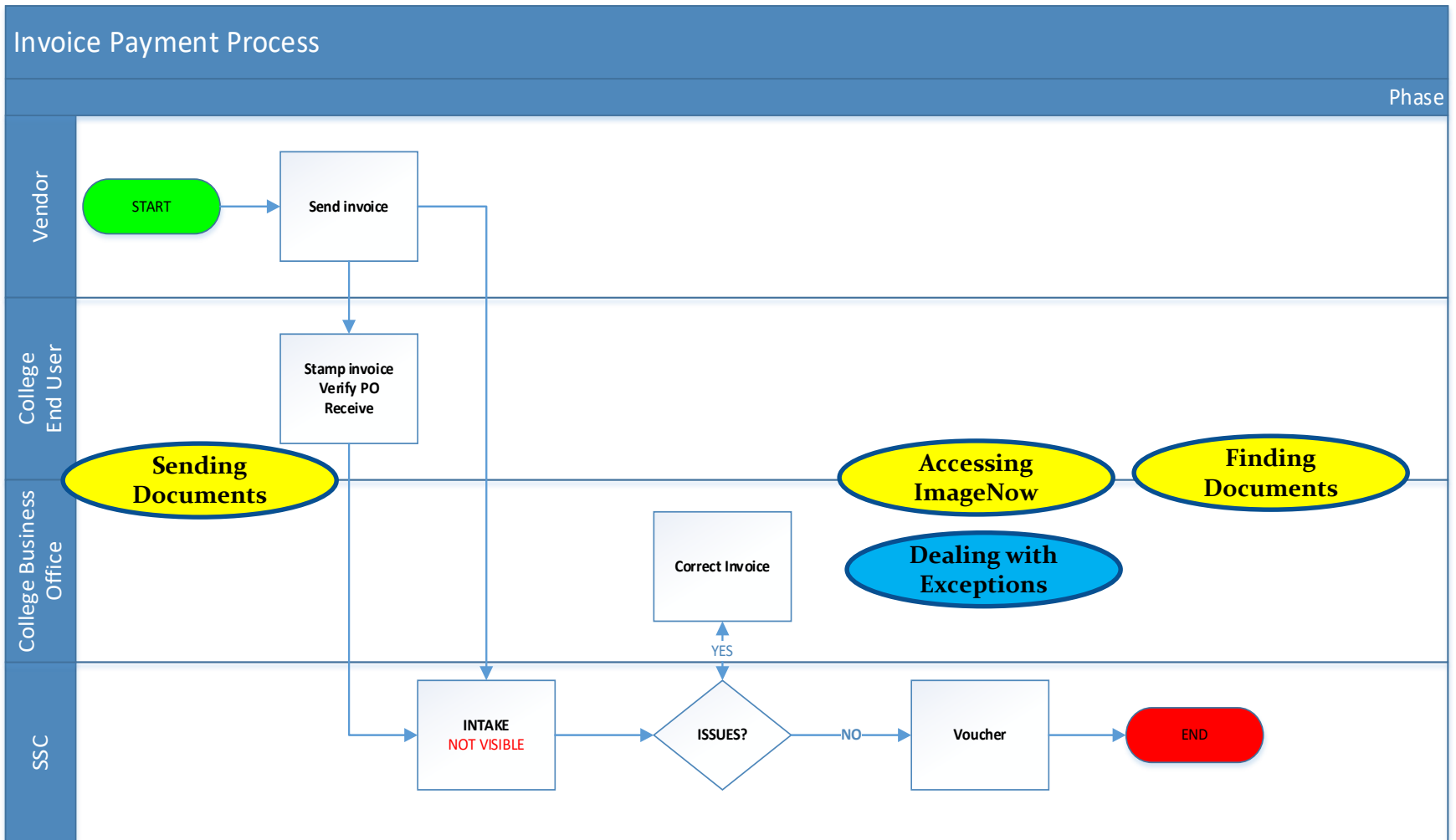


Accounts Payable Overview

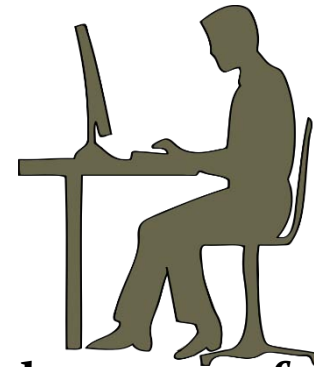


How to send a document to SSC



Sending documents from your copier

- 1) Select scan or email a document
- 2) Type the address of invoice@ssc.vccs.edu
- 3) Only one document at a time!
- 4) Type a subject with NO special characters in the subject line, e.g. no dashes, no asterisks, no slashes
- 5) Press send or go on your copier



Sending documents from your computer

- 1) Forward the document to the address of invoice@ssc.vccs.edu. Make sure you INCLUDE attachment.
- 2) Only one document at a time!
- 4) Type a subject with NO special characters in the subject line, e.g. no dashes, no asterisks, no slashes
- 5) Press send

NEED HELP?? Call SSC at 877-340-5577

Invoices

1. Treat them like a deadly virus. But, if you must...
2. Verify that the **PO is valid**. If possible, confirm that the PO has an adequate encumbrance to allow payment.
3. Complete **receiving in eVA**
4. Date stamp the invoice
5. Email it to invoice@ssc.vccs.edu
 - a. Send only one invoice attachment per email
 - b. Do not include any special characters in your email text or attachment name. Use **alphanumeric combinations only!** Example: VWCC State Electric EP2579831
6. Think to yourself: “How do I get out of having to do this?”

Invoices & Prompt Pay

- Didn't get an invoice at your office? Prompt Pay still applies
- Prompt Pay: Virginia law requires every agency to promptly pay for any completely delivered goods or services
- Prompt Pay: the Agency is impacted in 2 ways:
 - Invoice Date: Invoices laying around on desks create a risk for late payment. Treat them like deadly viruses!
 - Receiving Date: The CAPP manual says you **MUST** receive the goods or services in eVA **WITHIN 3 DAYS** of physically receiving the goods or services.



I Need Help!

Contact the SSC Help Center

1-877-340-5577

help@ssc.vccs.edu

```
graph LR; A[Send a Document] --> B[Accessing ImageNow]; B --> C[Find a document]; C --> D[Dealing with Exceptions];
```

Send a Document

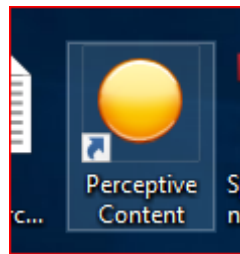
**Accessing
ImageNow**

Find a document

Dealing with
Exceptions

Accessing Image Now

1. Find the Perceptive Content icon on your desktop or menu



2. Log into ImageNow using your MyVCCS userid and password.
3. When your MyVCCS password resets, the Image Now password will also be reset.

Send a Document

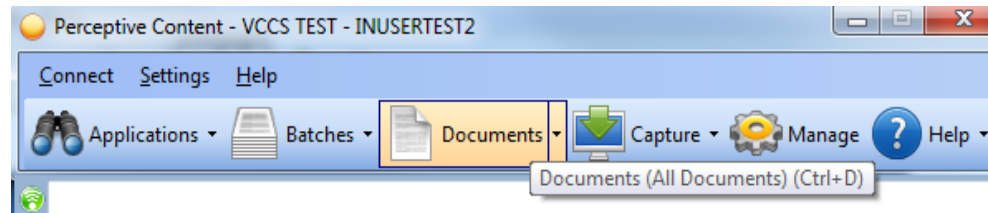
Accessing
ImageNow

Find a document

Dealing with
Exceptions

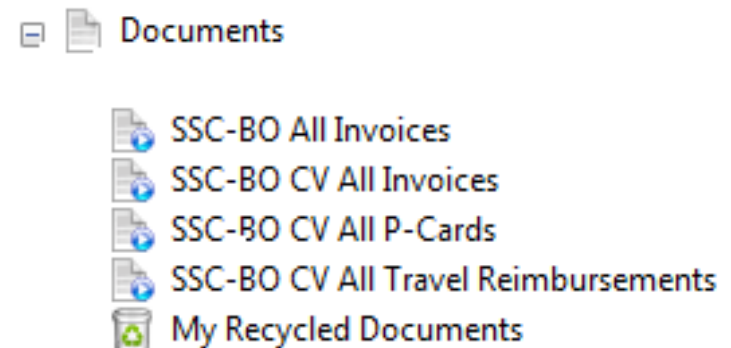
Finding/Retrieving a Document

1. Log into ImageNow using your MyVCCS userid and password.
2. Click on Documents on the tool bar.



3. Click on the SSC-BO xx All Invoices, All P-Card, or All Travel Reimbursements view on the Left hand side of the screen. (XX will be replaced by your college abbreviation.)

4. A list of documents will display on the right-hand side of the screen. Find your document in the list or do a search for it.



5. Double-click on the document to open and view it. (F7 and F9 keys open additional properties and links information that is useful.)

Types of Searches in ImageNow

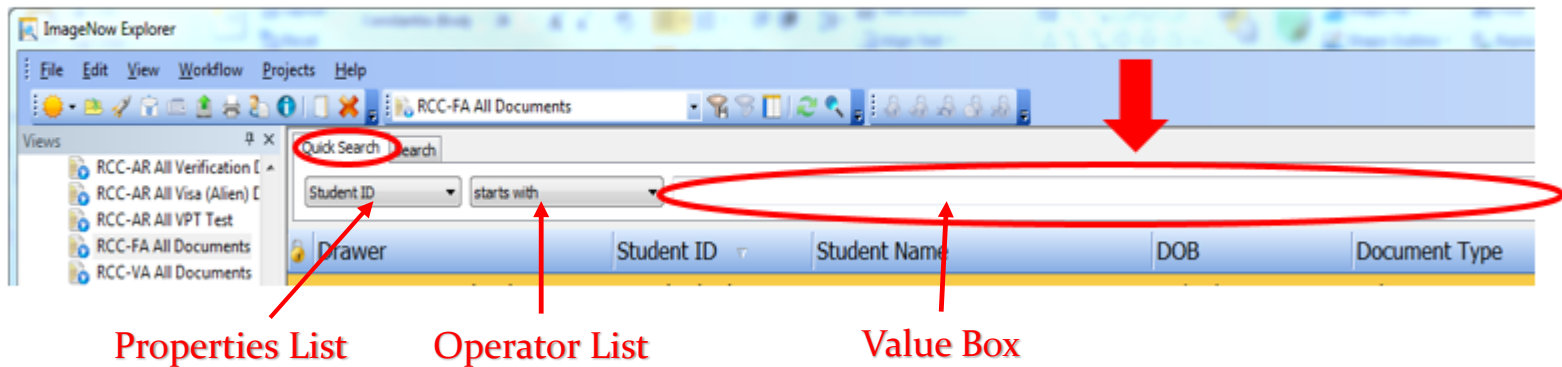
Quick Search

- Easy, quick method to search.
- Includes a property list, operator list, and value box.
- Can search using a single criteria, such as AIS Vendor Name, Invoice Amount, eVA PO #, etc. Additional criteria are available in the “custom properties” selection of the drop down box.

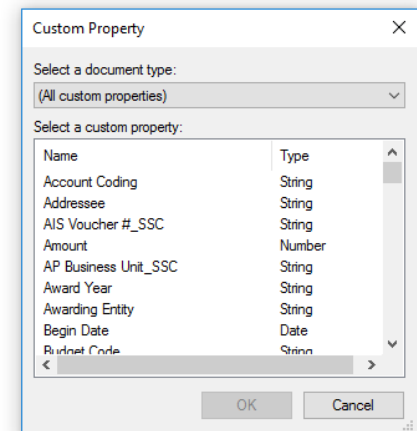
Advanced Search

- Allows users to search by more than one criteria.
- Helps to narrow down a search when there are lots of results.

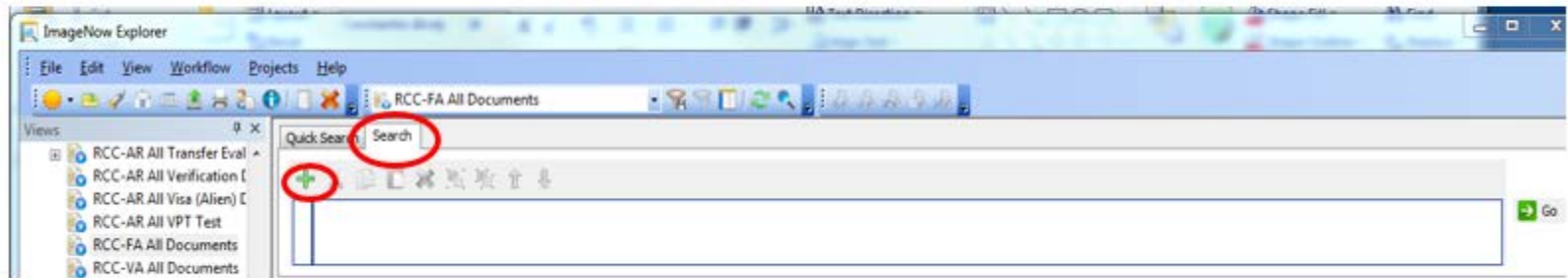
Quick Search



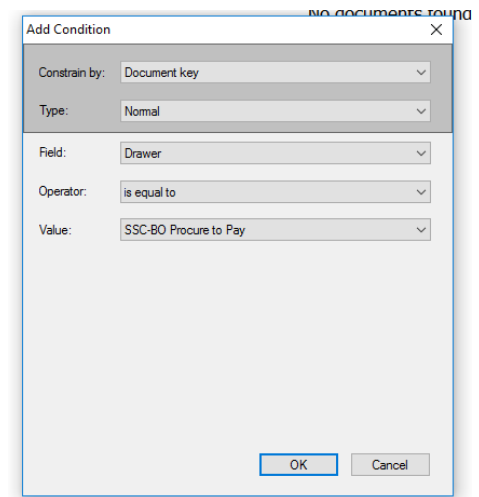
1. Click the Quick Search tab.
2. In the Properties list dropdown, select one of default properties or select Custom property to see additional search properties.
3. If you select custom property the Custom property dialog box will open. Choose a custom property and click OK.
4. In the Operator list, select an operator to use in the comparison.
5. In the Value box, select or type a value.



Advanced Search



1. Click the Search tab and click the Add button.
2. In the Add Condition dialog box, in the Constrain by list, select Custom property.
3. In the Type list, select the type of search to perform or leave as normal
4. In the Field list, select the custom property to use in the search.
5. In the Operator list, select an operator to use when comparing the field and the value.
6. In the Value box, select or type a value for the search.
7. Click OK.



Multiple search criteria can be added by repeating the process above.

Search Tips

ImageNow has many custom properties available for search. However, not all of the fields are applicable for invoices and many fields have similar names.

Useful default search properties:

- Invoice Amount
- AIS Vendor ID
- AIS Vendor Name
- AIS PO ID

Useful custom search properties:

- AIS Voucher #_SSC
- Business Unit_SSC
- eVA PO #
- Invoice_Date
- Invoice #



I Need Help!

Contact the SSC Help Center

1-877-340-5577

help@ssc.vccs.edu

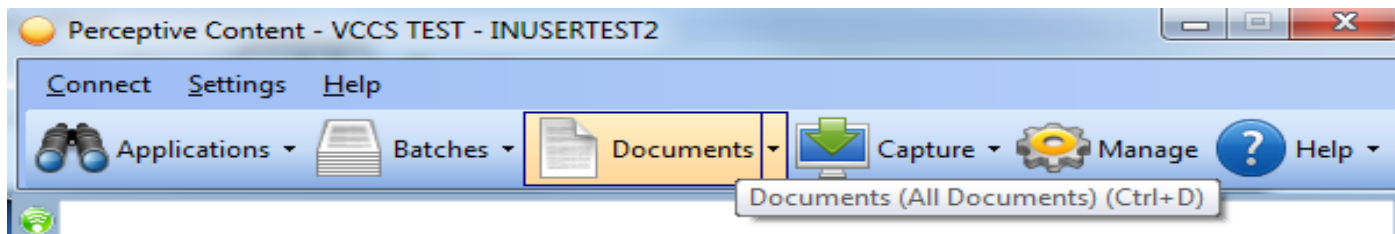
VOUCHER REQUESTS

Tax ID/EMPLID #: <small>Attach W-9 & Cardinal substitute W-9</small>	<input type="text"/>	Request/Invoice No:	<input type="text"/>
eVA exclusion type:*	<div style="border: 1px solid black; padding: 5px;"><p>-- Select One --</p><p>Reimbursement to school systems for dual enrollment expenses</p><p>Intra-agency payment</p><p>Payment to state/local agencies or foundations</p><p>Refund of tuition to a third party provider</p><p>Tuition Management System disbursement</p><p>Student club purchase (does not include state funds)</p><p>Clinical agreement</p><p>Bond payment</p><p>Grant stipend</p><p>Executive compensation payment to a third party provider</p></div>		
AIS Coding:	Departm		CS/College
Fund*			rogram
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

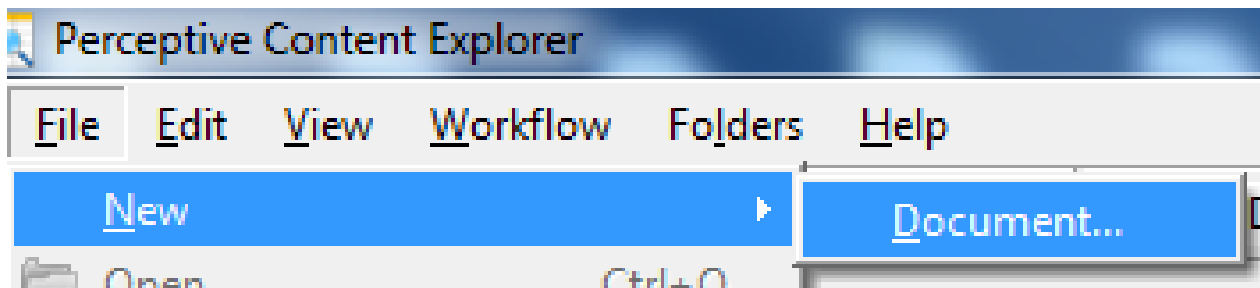
Voucher requests don't require a PO. There is a very narrow defined list of what doesn't require a PO and those reasons are listed above.

Creating a Voucher Request Form

1. Log into the ImageNow Client using your MyVCCS userid and password. *(The eForm CANNOT be created in WebNow.)*
2. Click on Documents on the tool bar.




3. Click on File and then click on New and choose Document...



4. The New Document dialog box will open. Make sure that SSC-BO Non-PO Vouchers is selected in the Application Plan, click on the gold key, and then click the OK button.

New Document

Application Plan
Select an application plan
SSC-BO Non-PO Vouchers 
 Use as default application plan

Location
Drawer
SSC-BO Voucher Requests
Name

Properties
College ID

Business Unit ID

Request Date


Requester Name

Request/Invoice #
000000053
Type
SSC-BO Voucher Request Form

Custom Properties

Requester_Email	
AIS Voucher #_SSC	

Use default values

Document Options
 Add to version control
 Submit to Content Server
 Create shortcut in folder
 

OK Cancel

5. The Voucher Request Form will open. Fill in the information on the eForm.

Virginia's Community Colleges

Voucher Request Form
* = Required Field

Requester Information:

College ID:*	-- Select One --	Request Date:	(MM/DD/YYYY)
Business Unit ID:*	-- Select One --	Department Name:*	
Requester Name*:		Requester Phone Number:*	
Requester Email*:		Preferred Method of Contact:	<input type="checkbox"/> Email <input type="checkbox"/> Phone

Voucher Request Details:

Payee Name:*		Cardinal Vendor ID:	
Payee Address:*		<small>To be completed by Shared Service Center Staff</small>	
City/State/Zip:*		AIS Vendor ID:	
Tax ID/EMPLID #:		<small>To be completed by Shared Service Center Staff</small>	
		Cardinal/Agency Location #:	
		<small>To be completed by Shared Service Center Staff</small>	
		Request/Invoice No:	000000058

Form

6. Click on Submit once you have completed the form.
7. Make sure to close the document before beginning a new voucher request

Adding Attachments to a Voucher Request Form

1. The documents that need to be attached must be in digital format.
2. With the Voucher form open, drag the file(s) that needs to be attached into the thumbnails section below the form. ****You will not see the attachment in the thumbnails until you save it.**



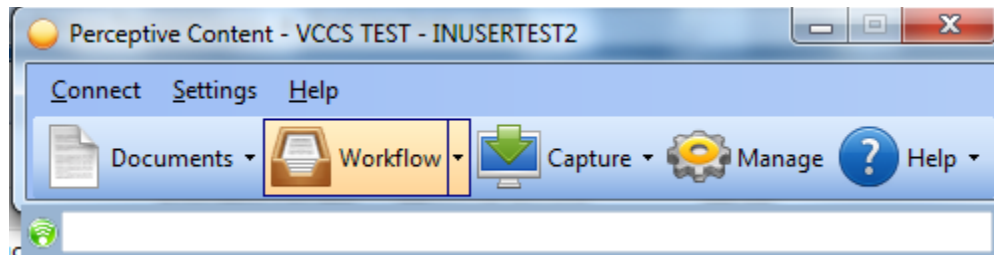
3. Click on the Save button.



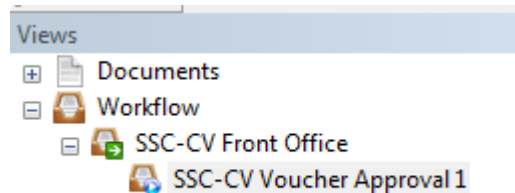
****If the Thumbnails section is not displayed automatically, hit the F9 key on your keyboard.**

Approving a Voucher Request Form

1. Log into ImageNow using your MyVCCS userid and password.
2. Click on Workflow on the toolbar.



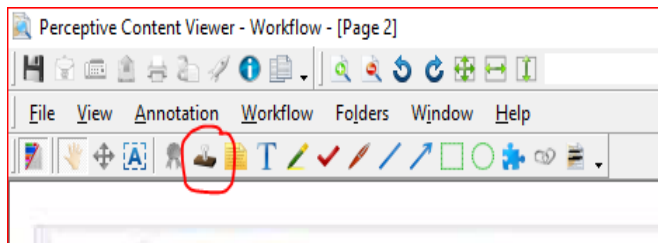
3. Click on the plus (+) sign next to the workflow that you will approve forms in. (In this example, the workflow name is SSC-CV Front Office.)



4. Click on the queue you will be approving documents in. (In the example above, the name is SSC-CV Voucher Approval1.)
5. Double click on a document to open it, if it does not automatically open.
6. Review the request. When you are ready to approve it, double-click on the TIFF image of the form. (It should be the last thumbnail, but this could vary.)



7. Scroll down to the Approved by section and add the approved Stamp. You will find the stamp in the bar below the menu bar as shown below.



Approved by:



8. Route the document forward so that it goes to the next step in the process.



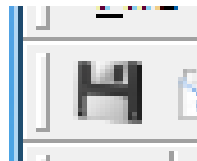
** Your options when you route forward will differ depending on the agency setup and which queue you are routing from. If there is a Hold for Updates option, this allows you to send the form back to the requester for any updates that may need to be performed. You will want to put a note on the form by using the Notes field to the right of the form or by using the text annotations and adding it on the image in the section labeled Additional Notes. Once all approvals are done, you will want to route it to the Voucher Approved queue so that it goes to the SSC Back Office for processing. If the Route Forward option is not available, double-click on the first thumbnail so that the form opens back up and try again.

Adding Stamps and other Annotations

1. Select the annotation that you want to add to the document.



2. Click the area of the document that you want the annotation to be.
3. Click on the Save button.



Send a Document





Accessing
ImageNow

Find a document

**Dealing with
Exceptions**

ITEMS RETURNED TO THE COLLEGE

If the SSC-BO Specialist receives an invoice for the College requiring additional work or documentation, the invoice is routed back to the College for correction. Any invoices returned to the College will be in the **SSC-XX Exceptions Follow Up** (*XX will be replaced by your agency abbreviation*) workflow queue. Someone should monitor this workflow queue daily to work returned invoices and return them to the SSC in a timely manner.

- [-]  Workflow
 - [-]  SSC-CV Front Office
 -  SSC-CV Exceptions Follow Up
 -  SSC-CV Routeback to SSC-BO

MISSING RECEIPTS OR PO#s

Invoices without a Receipt:

If SSC cannot find a receipt in eVA for the item, SSC will route the invoice to the College exception queue. Those responsible for monitoring the queue will contact the appropriate person to receive the item in eVA. After the item has been received, the document should be routed back to the SSC.

Invoices without a PO# or invoices with low or no encumbrance.:

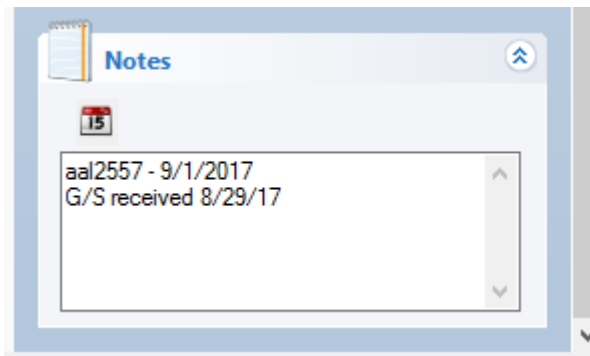
The SSC-BO AP team will route the invoices to the College exception queue for resolution. Once the issue is resolved (e.g. another PO number provided or funds added to the existing PO), the document should be routed back to the SSC.

Once the necessary corrections have been made and the receiving information is included, the image document should be routed forward to the **SSC-XX** **Routeback to SSC-BO** to continue review and processing of the invoice by the SSC-BO Specialist.



- [-] Workflow
 - [-] SSC-CV Front Office
 - SSC-CV Exceptions Follow Up
 - SSC-CV Routeback to SSC-BO

****Please use the "Notes" field (click on the calendar and your credentials and date will post automatically to the notes section) to communicate with the SSC-BO Specialist.**



WEBEX RECORDING

- How to deal with exceptions in ImageNow (Business Office)
- Receiving in eVA
 - <https://eva.virginia.gov/pages/eva-cbt-yt-email-receive-by-quantity.htm>



I Need Help!

Contact the SSC Help Center

1-877-340-5577

help@ssc.vccs.edu



ARCHIVE

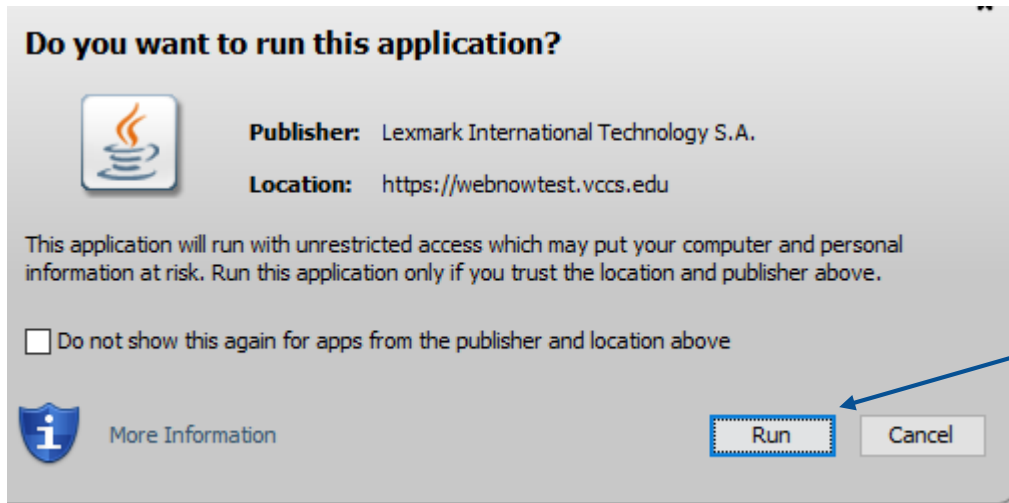
How to Access ImageNow (WebNow)

- VPN access to your network is **required** for WebNow. It provides a secure tunnel/connection to sensitive data stored in ImageNow.

<https://webnowtest.vccs.edu/webnow> (TEST)

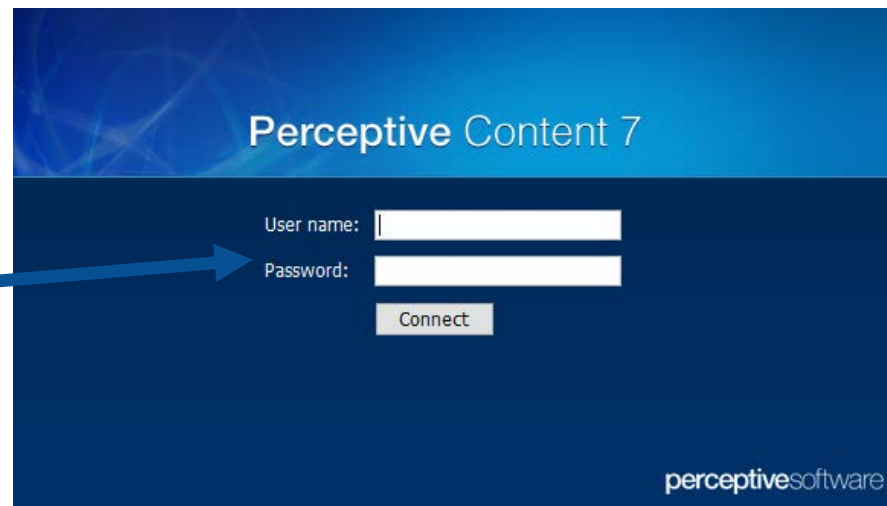
<https://webnow.vccs.edu/webnow> (PROD)

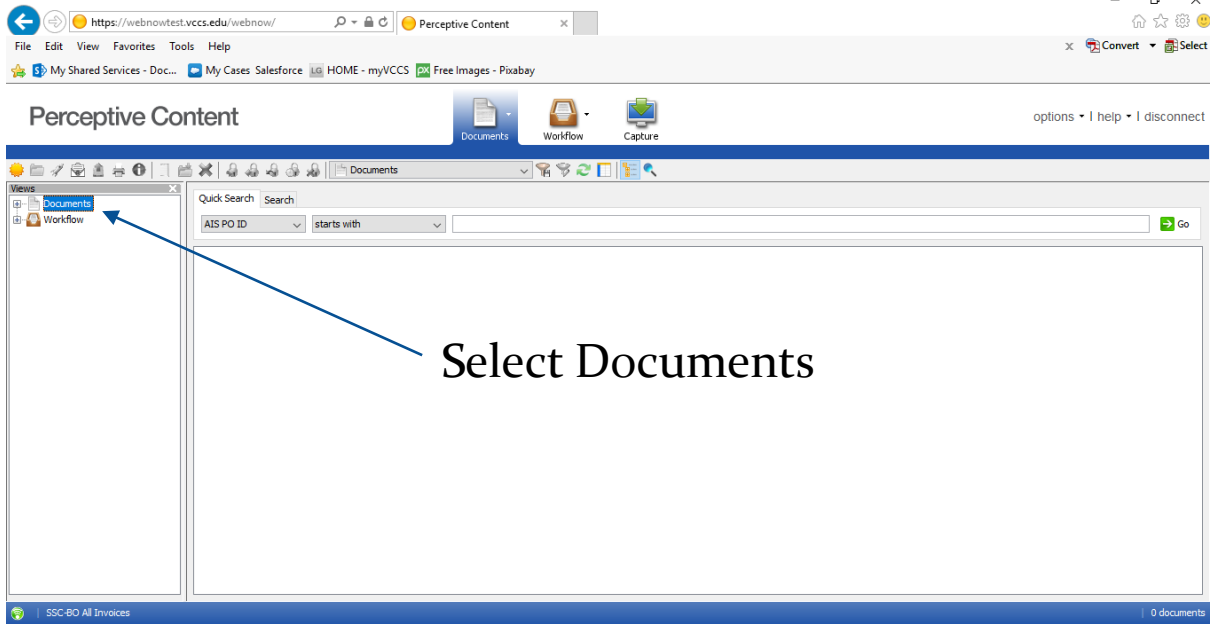
NOTE: If you work in the business office, you will need ImageNow installed on your computer rather than using the links above. Contact SSC at 877-340-5577 to have this done if you haven't already.



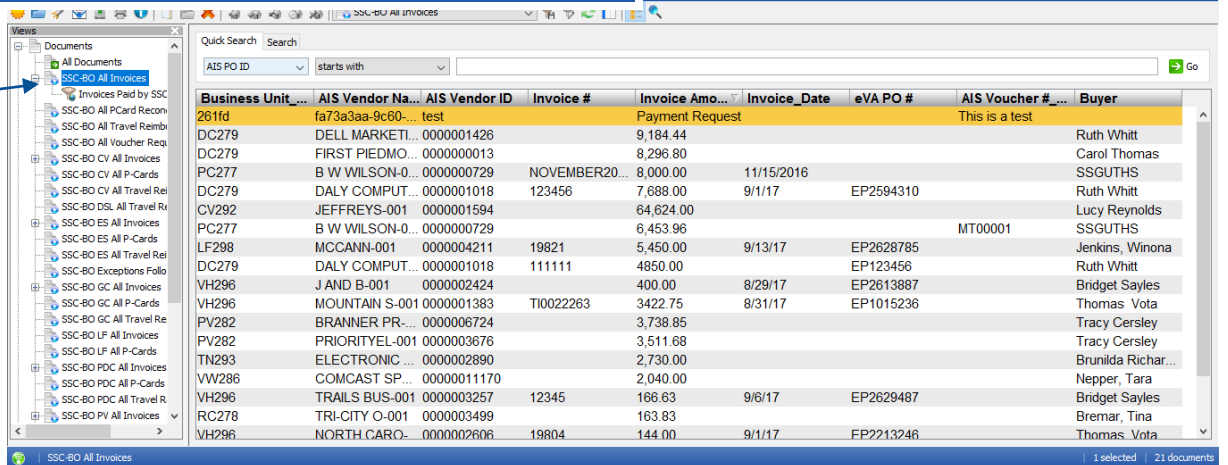
Select Run

Enter MYVCCS
Username &
Password





Select All Invoices



You should see a list of invoices that have been emailed/sent to Shared Services Center.



I Need Help!

Contact the SSC Help Center

1-877-340-5577

help@ssc.vccs.edu



Roadblocks

1. eVA receiving
2. Invalid POs
3. New business rules
4. Not sending invoices to the SSC timely
5. Not monitoring the exception queue

ImageNow Topics

- **Sending** a document to SSC
- **Accessing** ImageNow
- **Finding** a document in ImageNow
- Dealing with **exceptions** (limited users)
- Voucher requests (limited users)
 - Creating voucher requests
 - Approving voucher requests

Send a Document

Accessing ImageNow

Find a document

Dealing with
Exceptions

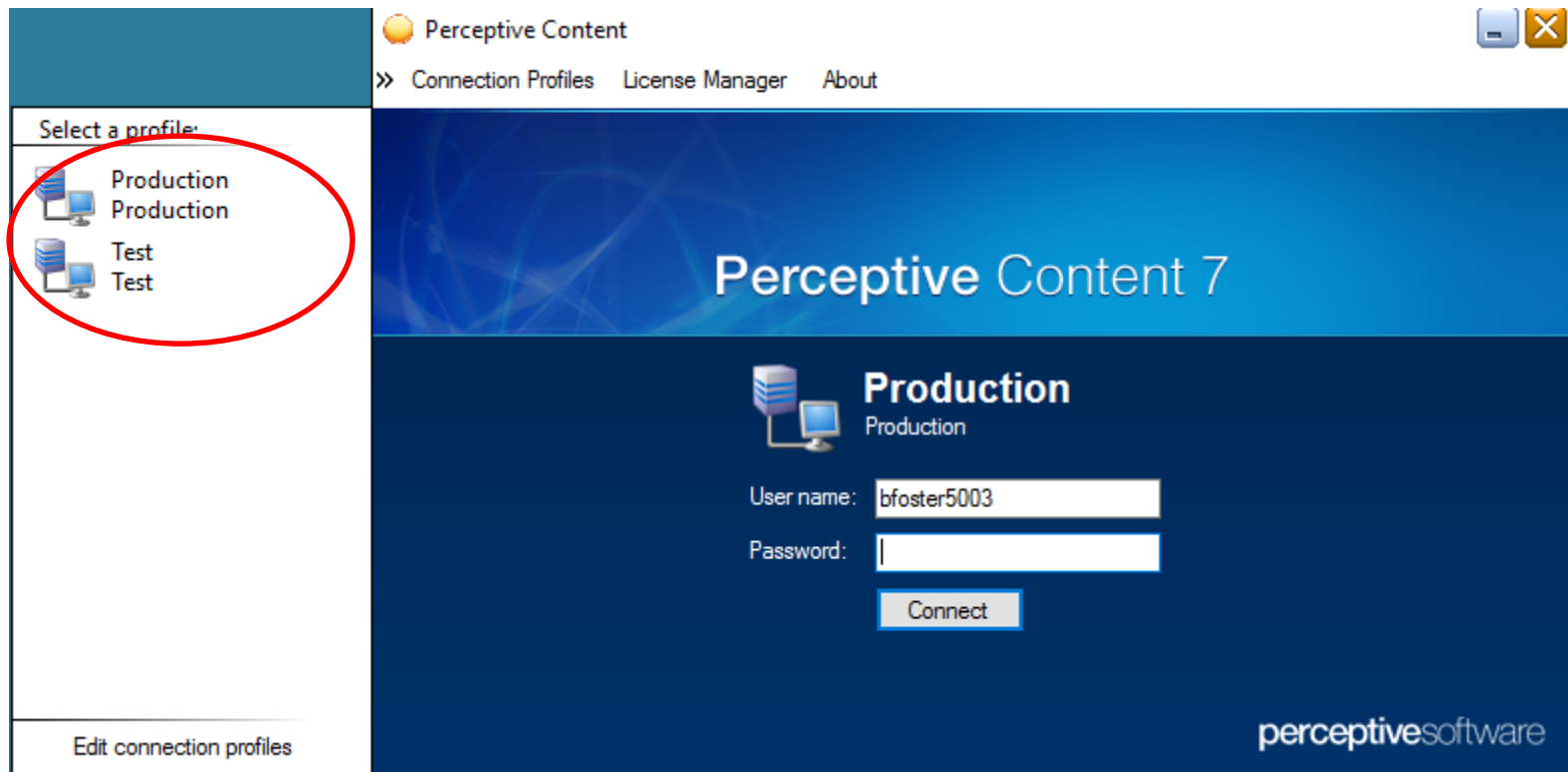
WEBEX RECORDING

- How to send a document to SSC

[https://vccsedu.webex.com/vccsedu/ldr.php?RCID=1bfic
a1f18a13c6d5a854acofff69d13](https://vccsedu.webex.com/vccsedu/ldr.php?RCID=1bfic
a1f18a13c6d5a854acofff69d13)

Connection Profiles

Users will have access to both TEST and PRODUCTION modules within ImageNow



RECORDINGS

Links below only work in Presentation mode

- [How to send a document to Shared Services Center](#)
- [How to access Webnow \(web based version of Imagenow – All Users\)](#)
- [How to find a document in ImageNow \(All users\)](#)
- [How to create a voucher request \(limited users\)](#)
- [How to reject or approve a voucher request \(limited users\)](#)
- [How to resolve an exception \(Business Office Use only\)](#)
- Receiving in eVA

<https://eva.virginia.gov/pages/eva-cbt-yt-email-receive-by-quantity.htm>