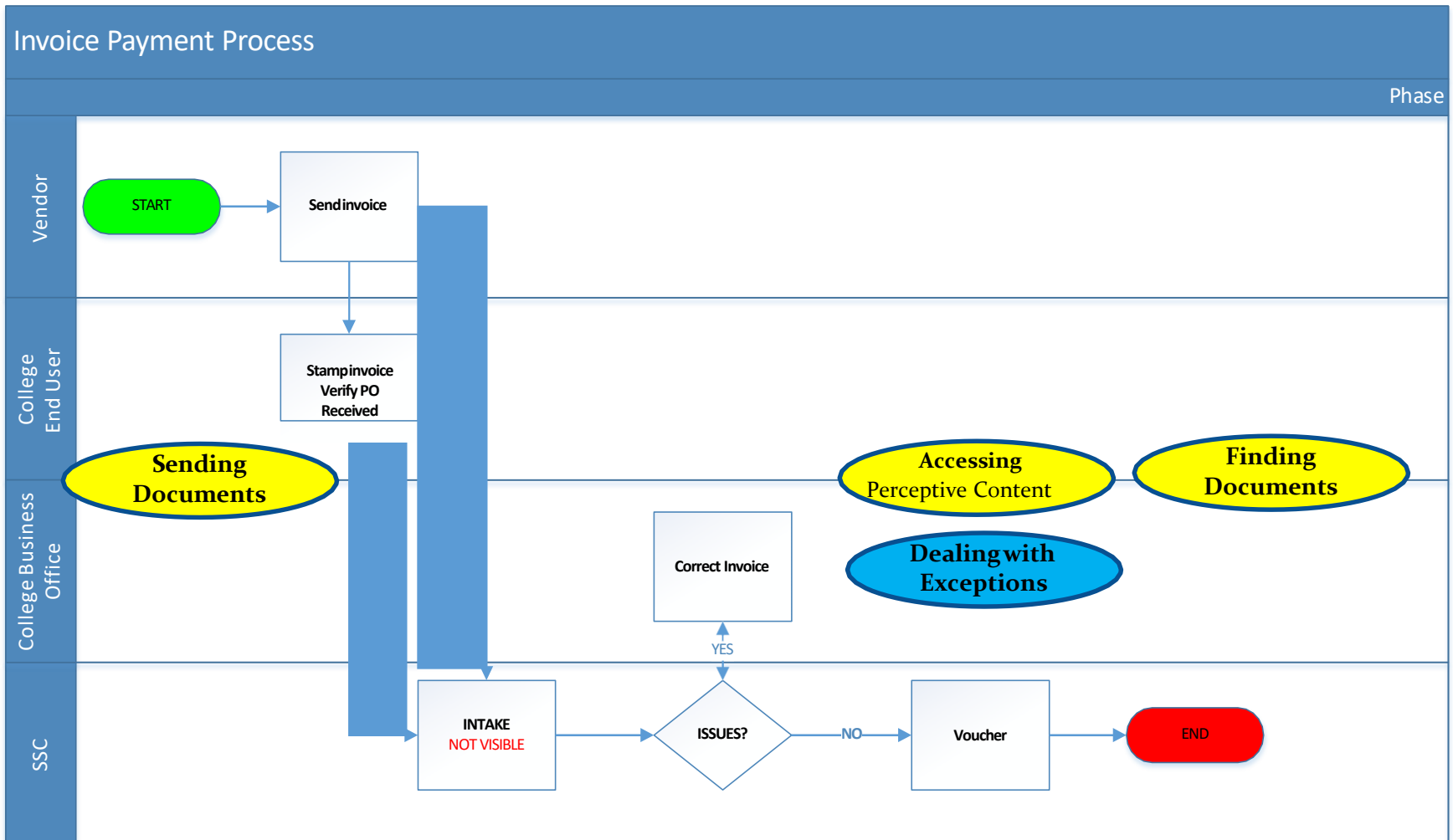


Accounts Payable Overview

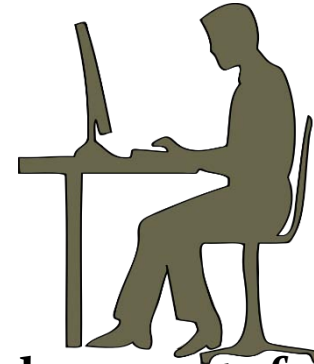


How to send a document to SSC



Sending documents from your copier

- 1) Select scan or email a document
- 2) Type the address:
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 Help Center 877-340-5577

Send the document

Accessing Perceptive Content

Find the document

Dealing with Exceptions

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 subject line, 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 5 DAYS** of physically receiving the goods or services.

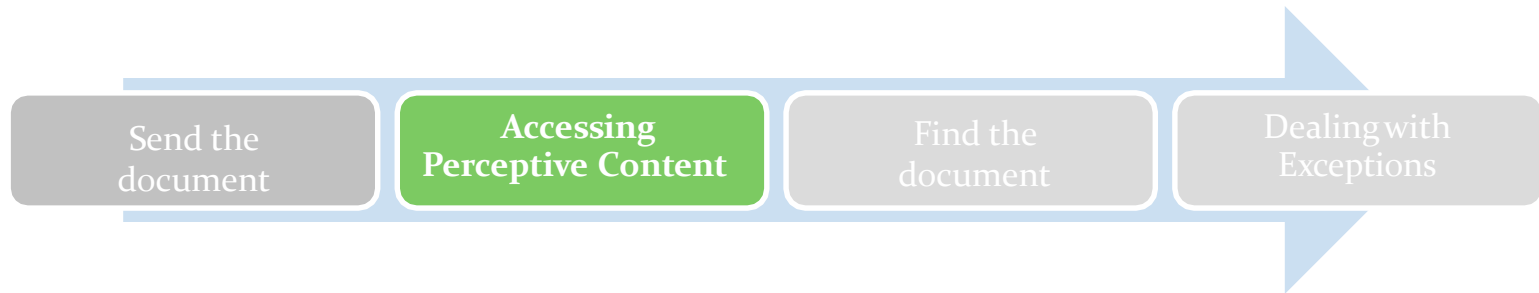


I Need Help!

Contact the SSC Help Center

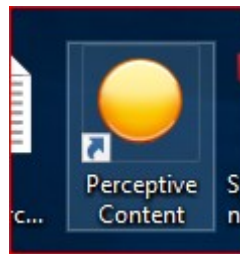
1-877-340-5577

help@ssc.vccs.edu

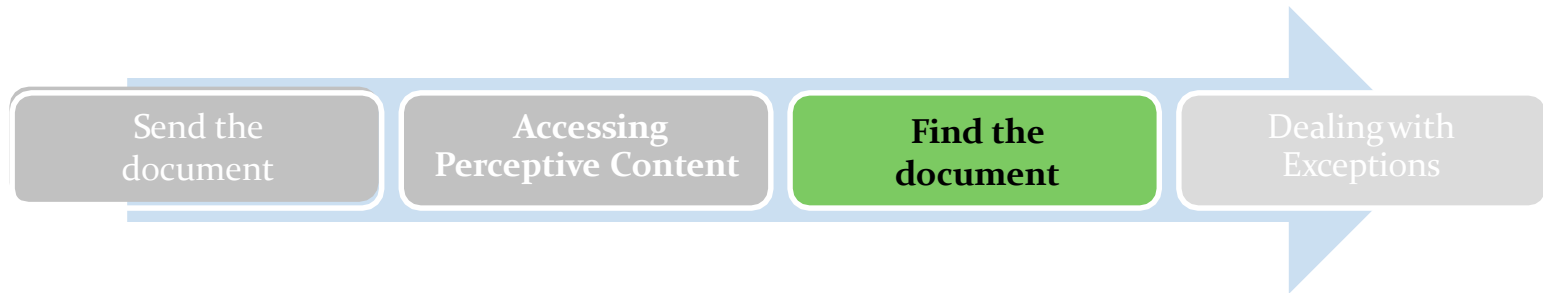


Accessing Perceptive Content

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

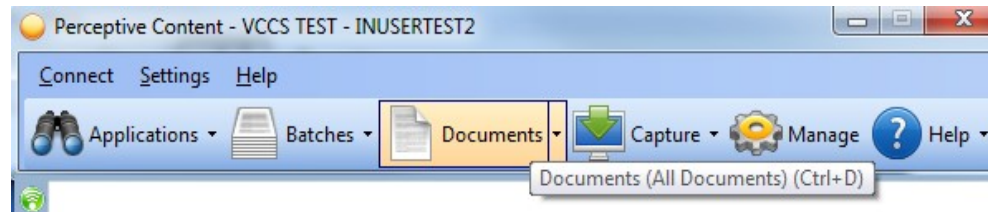


2. Log into Perceptive Content using your MyVCCS credentials.
3. When your MyVCCS password resets, the Perceptive Content password will also be reset.



Finding/Retrieving a Document

1. Log into Perceptive Content using your MyVCCS credentials.
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.)

Documents

- SSC-BO All Invoices
- SSC-BO CV All Invoices
- SSC-BO CV All P-Cards
- SSC-BO CV All Travel Reimbursements
- My Recycled Documents

Types of Searches in Perceptive

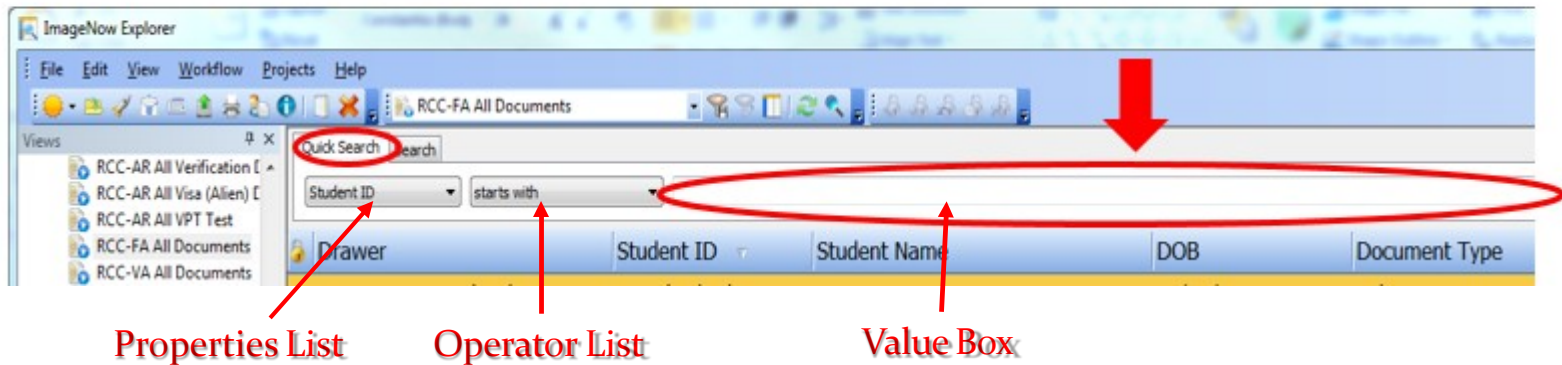
Quick Search Content

- 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.

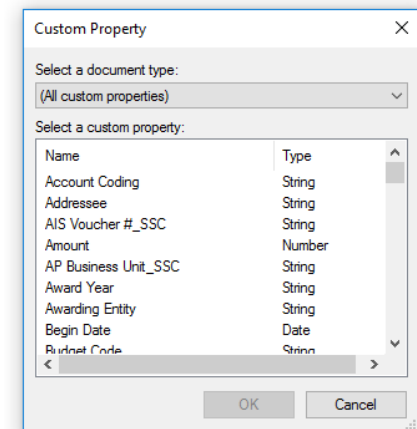
Advanced Search

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

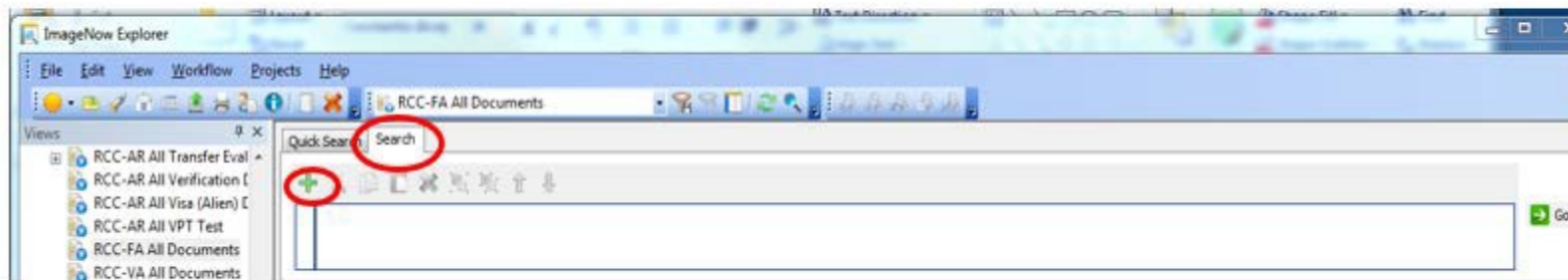
Quick Search



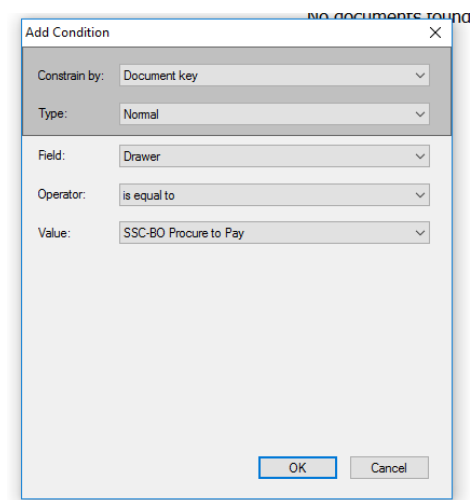
1. Click the Quick Search tab.
2. In the Properties list dropdown, select one of default properties or select Custom property to see additional search properties.
3. If you select custom property the Custom property dialog box will open. Choose a custom property and click OK.
4. In the Operator list,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

Perceptive Content 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

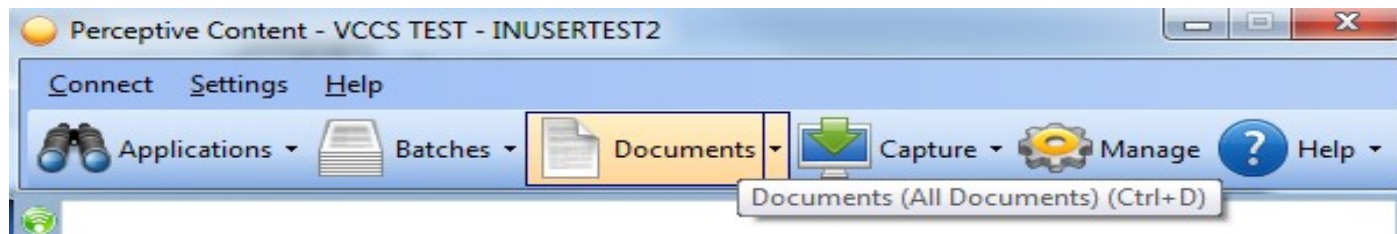
VOUCHER REQUESTS

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

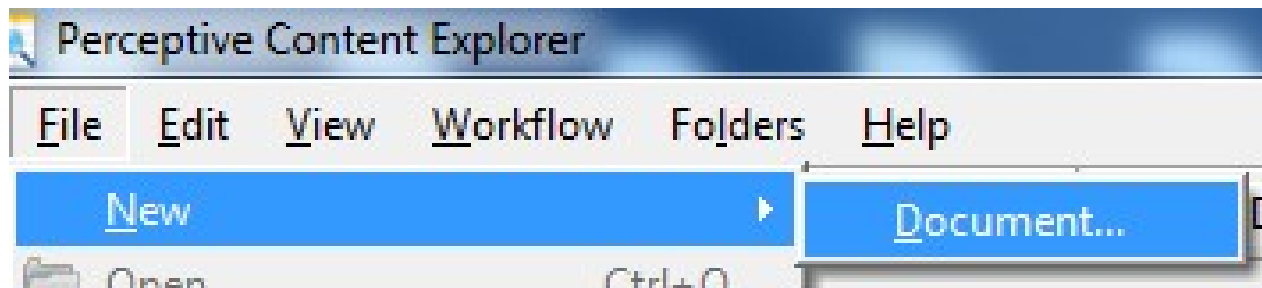
Voucher requests don't require a PO. There is a very narrow defined list of what doesn't require a PO and those reasons are listed above.

Creating a Voucher Request Form

1. Log into the Perceptive Content Client using your MyVCCS credentials. *(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

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

Custom Properties

Requester_Email	
AIS Voucher #_SSC	

☒ Use default values

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

Form

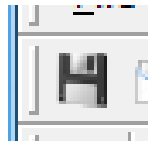
6. Click on Submit once you have completed the form.
7. Make sure to close the document before beginning a new voucher request

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.**



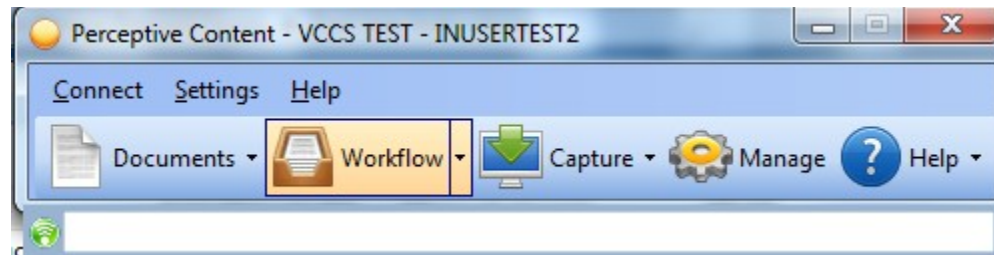
3. Click on the Save button.



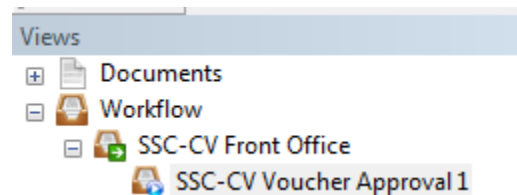
****If the Thumbnails section is not displayed automatically, hit the F9 key on your keyboard.**

Approving a Voucher Request Form

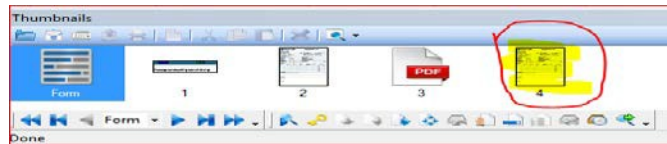
1. Log into Perceptive Content using your MyVCCS credentials.
2. Click on Workflow on the toolbar.



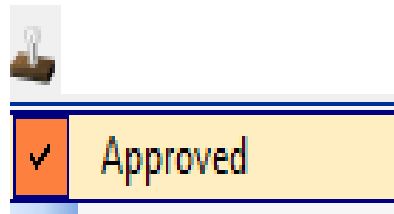
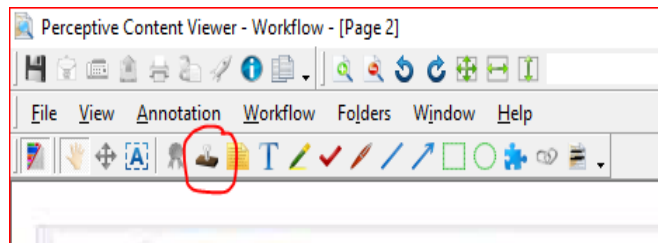
3. Click on the plus (+) sign next to the workflow that you will approve forms in. (In this example, the workflow name is SSC-CV Front Office.)



4. Click on the queue you will be approving documents in (In the example on the previous slide, the name is SSC-CV VoucherApproval1.)
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.



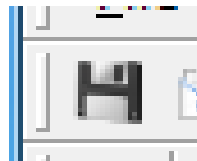
** Your options when you route forward will differ depending on the agency setup and which queue you are routing from. If there is a Hold for Updates option, this allows you to send the form back to the requester for any updates that may need to be performed. You will want to put a note on the form by 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.

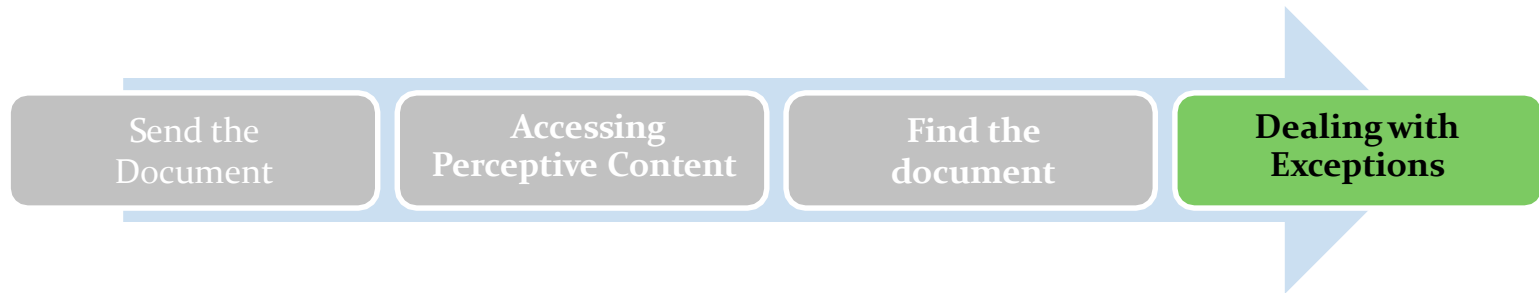
Adding Stamps and other Annotations

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.





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.:

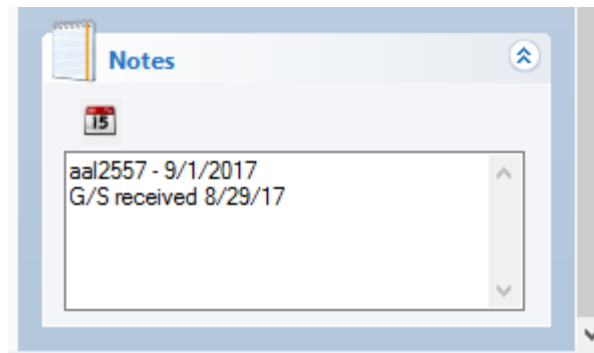
The SSC-BO AP team will route the invoices to the College exception queue for resolution. Once the issue is resolved (e.g. another PO number provided or funds added to the existing PO), the document should be routed back to the SSC.

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.**



Additional Resources

- How to deal with exceptions in Perceptive Content (Business Office)
- Receiving in eVA
 - <https://dgs.virginia.gov/globalassets/business-units/dps/documents/email/email-receiving-guide.pdf>



I Need Help!

Contact the SSC Help Center

1-877-340-5577

help@ssc.vccs.edu

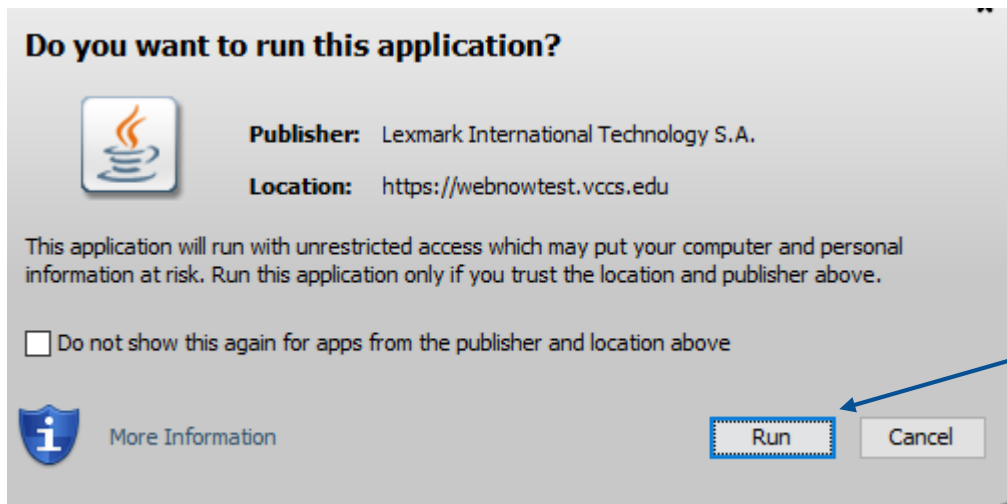
How to Access Perceptive Content (WebNow)

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

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

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

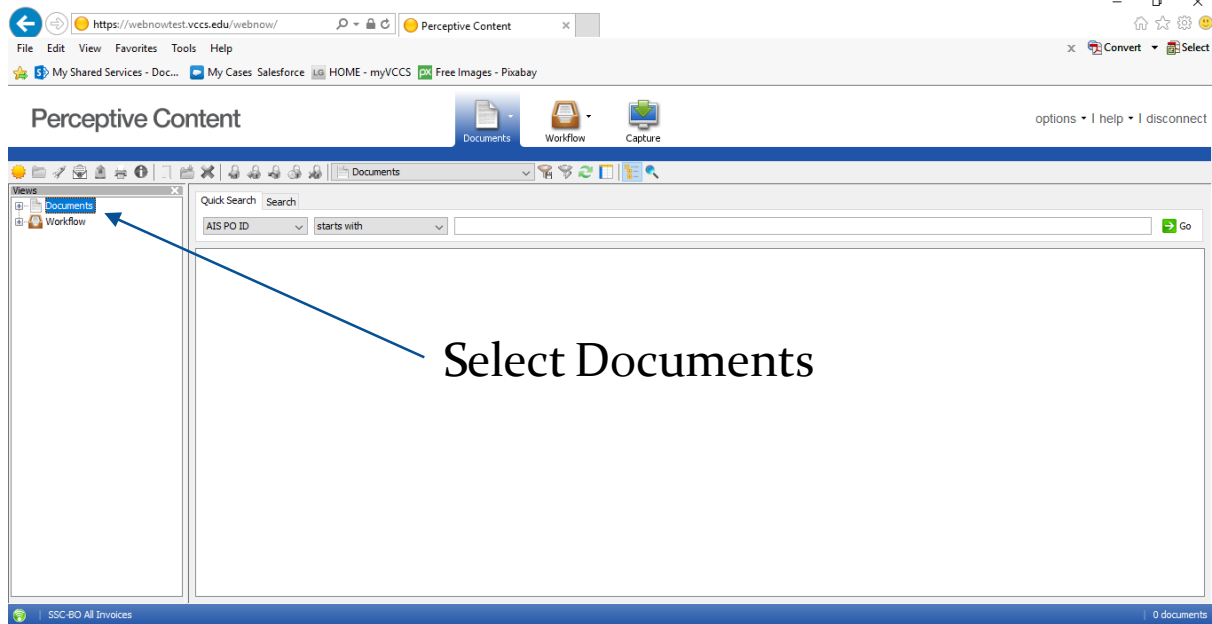
NOTE: If you work in the Business Office, you will need Perceptive Content installed on your computer rather than using the links above. Contact SSC Help Center at 877-340-5577 to have this done if you haven't already.



Select Run

Enter MYVCCS
credentials

The login screen for Perceptive Content 7. It has a dark blue background with a light blue header area containing the text "Perceptive Content 7". Below the header, there are two input fields: "User name:" and "Password:". A "Connect" button is located below the password field. The "perceptive software" logo is in the bottom right corner. A blue arrow points from the text "Enter MYVCCS credentials" to the "User name:" input field.



Select All Invoices

Views Documents All Documents

Quick Search Search

AIS PO ID starts with

Go

Business Unit	AIS Vendor Na...	AIS Vendor ID	Invoice #	Invoice Amo...	Invoice Date	eVA PO #	AIS Voucher #...	Buyer
261fd	fa73a3aa-9c60-...	test		Payment Request			This is a test	
DC279	DELL MARKETL...	0000001426		9,184.44				Ruth Whitt
DC279	FIRST PIEDMO...	0000000013		8,296.80				Carol Thomas
PC277	B W WILSON-0...	0000000729	NOVEMBER20...	8,000.00	11/15/2016			SSGUTHS
DC279	DALY COMPUT...	0000001018	123456	7,688.00	9/1/17	EP2594310		Ruth Whitt
CV292	JEFFREYS-001	0000001594		64,624.00				Lucy Reynolds
PC277	B W WILSON-0...	0000000729		6,453.96			MT00001	SSGUTHS
LF298	MCCANN-001	0000004211	19821	5,450.00	9/13/17	EP2628785		Jenkins, Winona
DC279	DALY COMPUT...	0000001018	111111	4850.00		EP123456		Ruth Whitt
VH296	J AND B-001	0000002424		400.00	8/29/17	EP2613887		Bridget Sayles
VH296	MOUNTAIN S-001	0000001383	TI0022263	3422.75	8/31/17	EP1015236		Thomas Vota
PV282	BRANNER PR...	0000006724		3,738.85				Tracy Cersley
PV282	PRIORITYEL-001	0000003676		3,511.68				Tracy Cersley
TN293	ELECTRONIC ...	0000002890		2,730.00				Brunilda Richar...
VW286	COMCAST SP...	0000001170		2,040.00				Nepper, Tara
VH296	TRAILS BUS-001	0000003257	12345	166.63	9/6/17	EP2629487		Bridget Sayles
RC278	TRI-CITY O-001	0000003499		163.83				Bremar, Tina
VH296	NORTH.CARO-	0000002606	19804	144.00	9/1/17	EP2213246		Thomas Vota

SSC-BO All Invoices

1 selected 21 documents

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 exceptionqueue

Perceptive Content Topics

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



Connection Profiles

Users will have access to both TEST and PRODUCTION modules within Perceptive Content

