User Guide for Content Apps
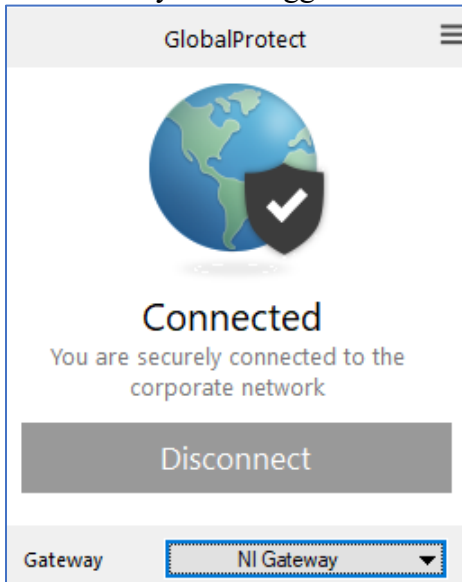
Contents

User Documentation for Content Apps

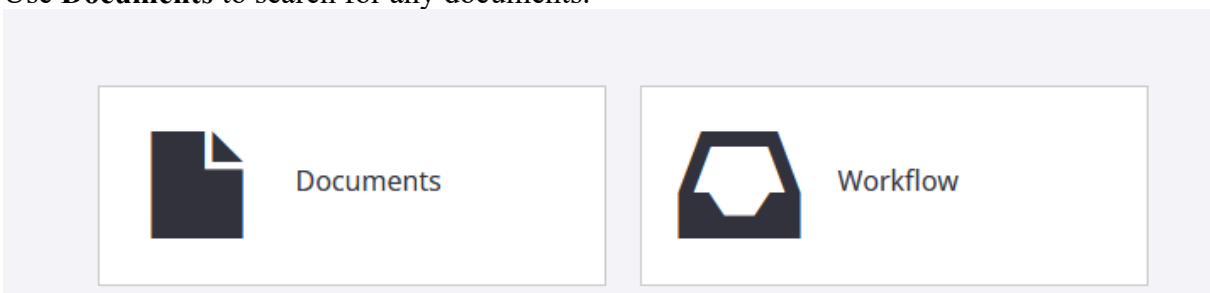## Logging On:

1. Navigate to https://perceptive.gatech.edu/contentapps using any browser.
2. Ensure that you are logged into the GT VPN.

3. This will launch the GT Login Page. Login using your GT Credentials.

4. You will be taken to the Home Page, shown below:
   Use **Workflow** to see documents in your queues needing action.
   Use **Documents** to search for any documents.
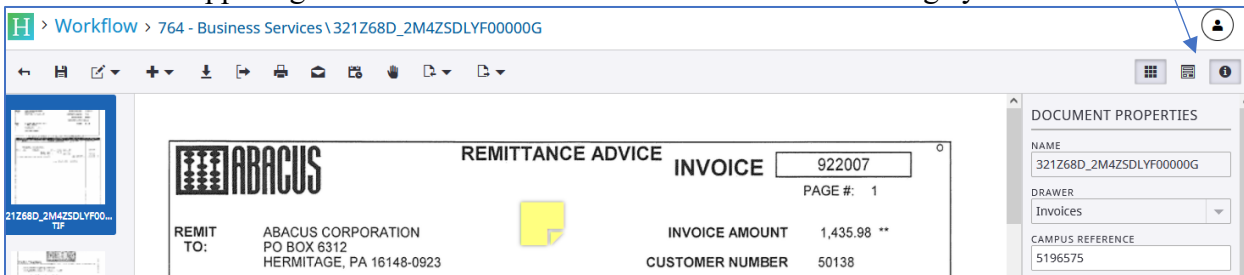
Workflow

Viewing

Click on Workflow to see documents in the Workflow Queues that you have access to in the application. It will display the same columns shown in the application.
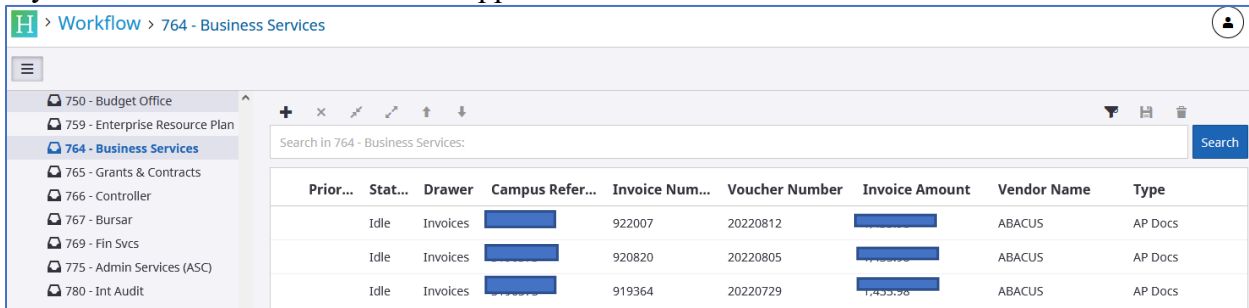
Click on the first item to open the invoice and determine next steps.

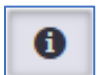## For Screen Viewing Settings:

Buttons in the upper right-hand side of the screen can be chosen to change your views.

  To Show or Hide Thumbnails in your view.
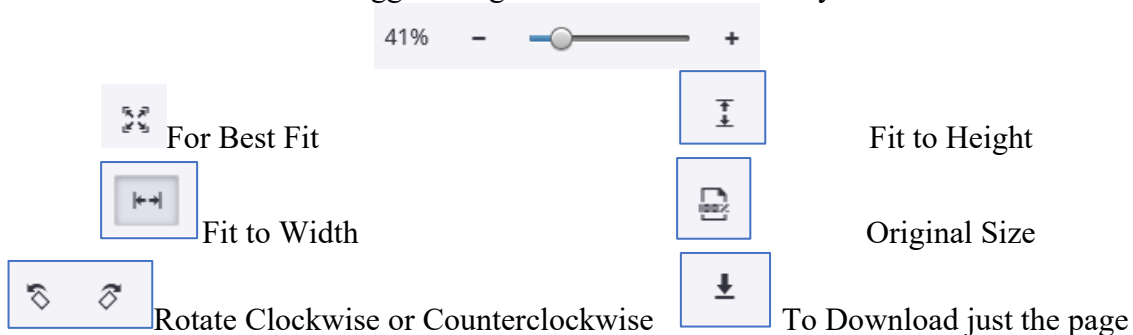
  To Show or Hide Forms in your view.

  To Show or Hide Document Properties in your view.

Bottom Toolbar To Adjust Views: you can use to go through the pages or alter the document view.
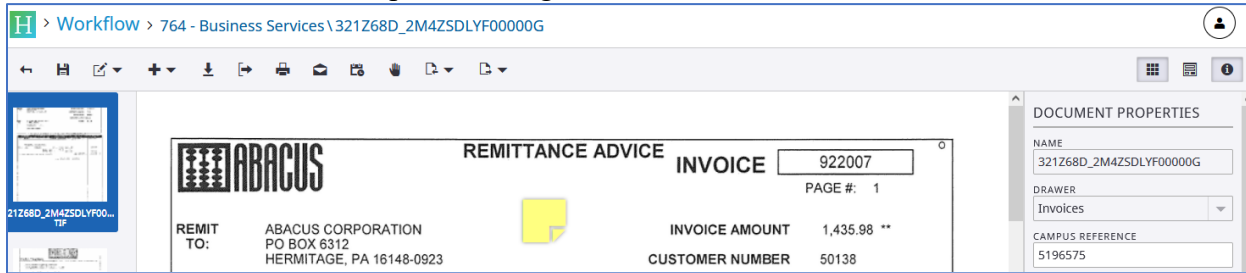
Make the document bigger using the slider bar to choose your Zoom Level.
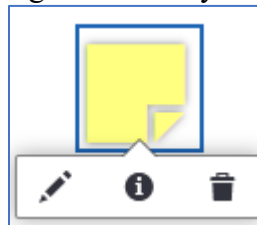

 For Best Fit   Fit to Height

 Fit to Width   Original Size

 Rotate Clockwise or Counterclockwise   To Download just the page

Approving and Routing Invoices

Click on a workflow item to open the image.

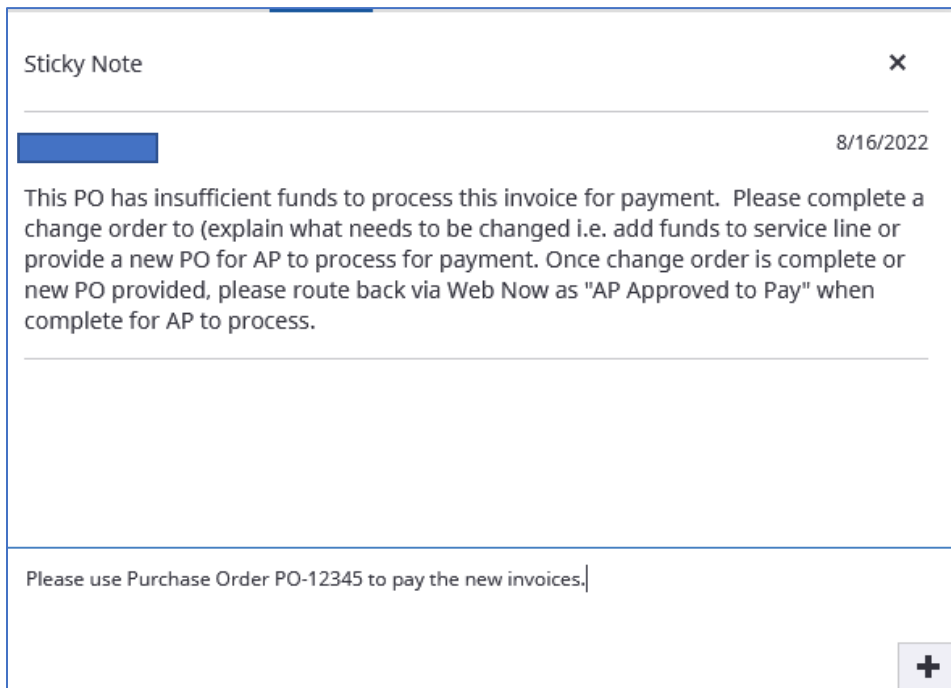Open the sticky note, by clicking on the sticky note and selecting the Edit Pencil.

This will show you the comment and allow you to enter your own comment to communicate with AP regarding the new Purchase Order number or other notes to approve the invoice.

After entering your comment, press the plus button to save your comment to the sticky note.

Then Close the Window or click on the document.

has several options to Route, Print or Email a Link to your colleague.

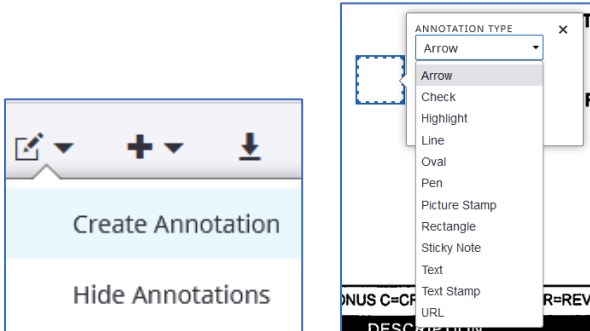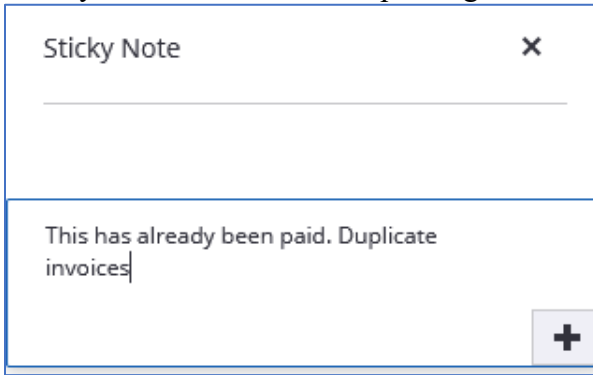Back Button to return to your Workflow or prior screen:

Save button:

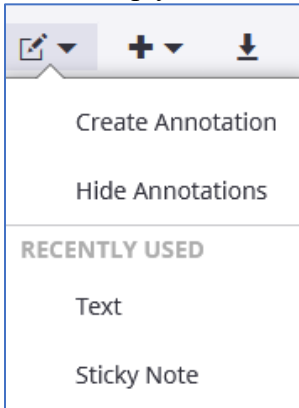Annotation: IF there is no sticky note, you can create your own.

Click on the Annotation Button and Click Create annotation and then place it somewhere on the document and choose your annotation type: Sticky Note and then click Add.
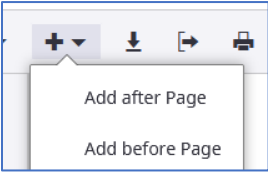Enter your note and click the plus sign.

It will keep your recently used annotations ready for you next time!

+ ▾

Add supporting documentation by adding pages Click on Add after Page or Add before Page

+ ▾ ↓ ➡ 🖨

Add after Page

Add before Page

Choose File and Click Done. Browse or Drag/Drop Files and click done when file selected:

Source	×
Select a capture source:	
File	
Scanner	
	Cancel Done

Select Files	
Browse or drag and drop files here.	
0 files selected.	
	Cancel Done

Select Files	
Browse or drag and drop files here.	
1 files selected.	
	Cancel Done

↓
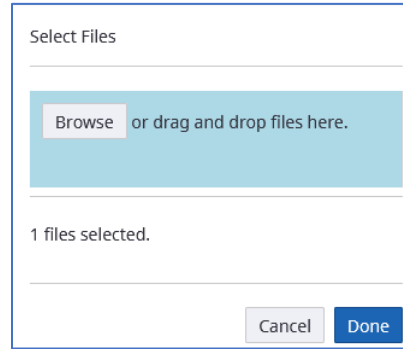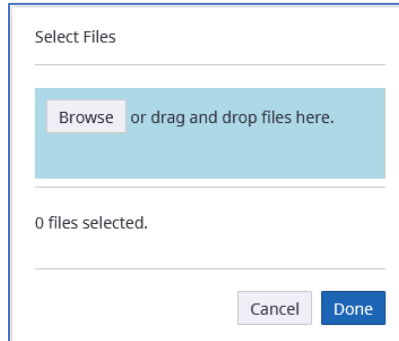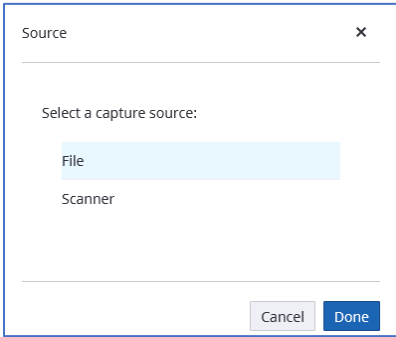
Download Document (Tiff pages)
Click and it will automatically download a zip file containing separate tiff files.

➡

Export to PDF to Save or Email the actual document(s)
Click and it will automatically download a zip file containing one pdf.
Use this option to Email the actual document(s) to the user who may not have access to Perceptive Content Apps.

Print - Click to print out the document.

If you want to see the cover page and annotations, keep the checkboxes checked.

IF you just want the document uncheck cover page.

NOTE: Sticky Note Annotations will ONLY display in the printed version if you choose the cover page.

Email a Link to the Document:

When looking at an image, click on the email button on the toolbar.

The first time you use, you *may* receive this pop up.
Click on the application you want and select the Always use this application if you want to keep your settings.
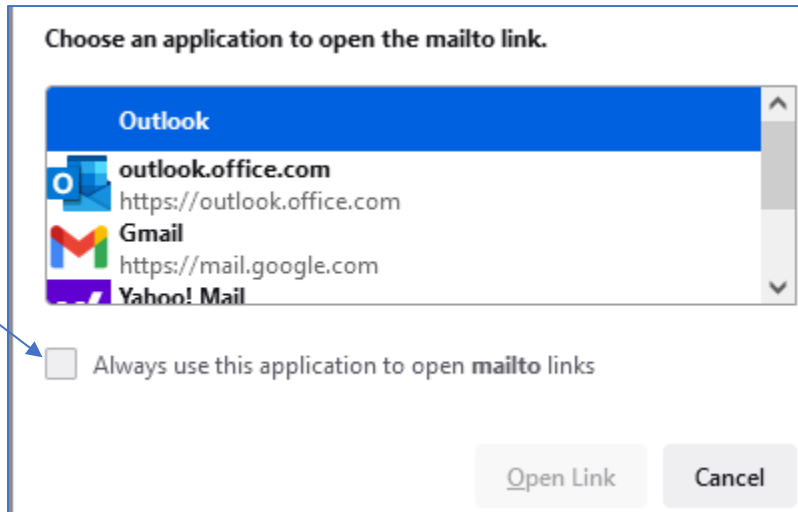
Your email client will appear with a new message started. The message will contain a URL to your image. Enter the recipient in the To: field and a message to your user. Send your email!

NOTE: Only other Perceptive Content users will be able to open the link.

Below are links to the workflow items:

https://perceptive.gatech.edu/contentapps/#workflow/view/1095441712_531250003640/item/321Z685_2M4CCEV0M00000L

Regards,
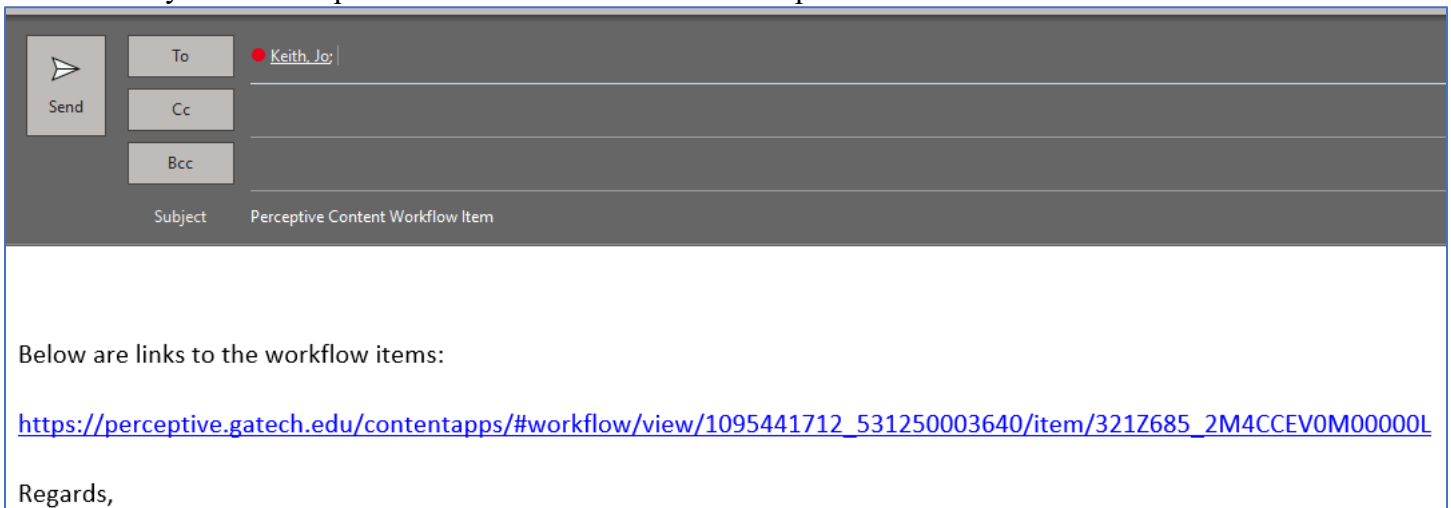
Please note: You may need to set up your default email application to be the one you use if a user does not receive your link. Click in the search bar at the bottom of your screen and type in Default apps.
Click on Open-to-open Default apps. Click on Email App – Choose Outlook (if this is what you use). Then Close your Settings.

Workflow History   Click on View to see history of the document's travels.

Routing

Click on the 'Route Forward' icon after you have added comments.
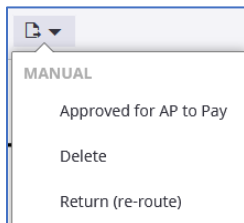You will notice you have three choices. Below is an explanation of what items should be routed to each of these queues.

<u>Approved for AP to Pay</u>
Route invoices to the 'Pay' queue that are electronically approved for payment.
These invoices will go to the AP Pay Desk to invoice and remit payment to the vendor.

<u>Delete</u>
Route invoices to the 'Delete' queue that have already been paid via PCard or submitted to AP on a check request or stamped paper invoice.
These invoices will be deleted from the Image/WebNow database.

Note:
a. It is assumed you have a copy of the invoice if paid by PCard
b. A check request or paper invoice submitted to AP will be scanned on the back end
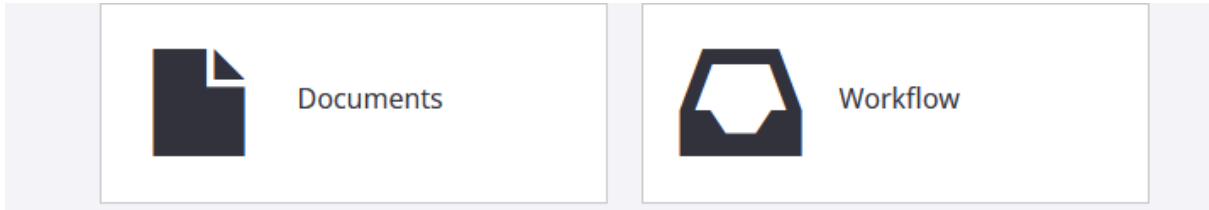
<u>Return (re-route)</u>
Route invoices to the 'Return (re-route) queue that were scanned to your queue but are not yours.
These invoices upon their return to AP will be re-routed to the rightful owner.
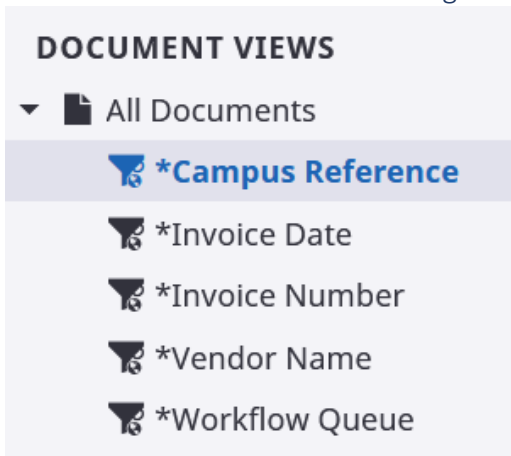
Document Searching:

1. To get to Documents, click on the HOME Button
2. Select Documents

Public views are available for searching.

Click on Campus Reference View and then Click on the Campus Reference Box

In the operator list, select an operator – such as 'starts with or 'is equal to' – that will compare the value in the field you selected above to the target value you will select.

In the value box, select or type a value to be compared to the value in the property field, such as 512304 for the PO # or Dell for the Vendor Name.

Click the Search button.

In the search grid, click the document to open it in viewer.

Notes	Workflow Status	Campus Reference	Invoice Number	Invoice Date	Invoice Amc
	Idle	5261715		20220811	
	Idle	5261713		20220811	
	Idle	5261716		20220811	

Click Back to go to the GRID of all documents that fit your search parameters. Select individual documents or use the check the box at the top of the grid to select all.
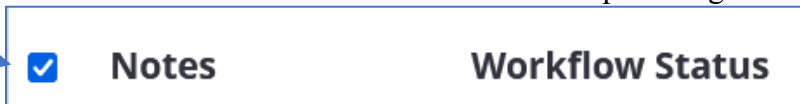
Export Grid   Click to export the grid to an excel file. It immediately downloads for you!

Create your own query and save a private filter for continued use.
Click on All Documents

In the **Search** tab, click the **Add** button.
In the **Add Constraint** dialog box, in the **Constrain By** list, click the kind of constraint that will set up the lists you need in the **Field**, and **Operator** boxes.

In **Field** list, click the document field in which the value will be tested by the operator and value you select below.
In **Operator** list, click the operator you want to perform the comparison – such as 'starts with' or 'is greater than'.
In **Value** box, enter or select the target value.
Click **Search**
Repeat steps for any additional condition rows.

Note: Each new row begins with **AND** by default. To change **AND** to **OR**, click **AND**.
        Click the Go button.