

User Guide for Content Apps

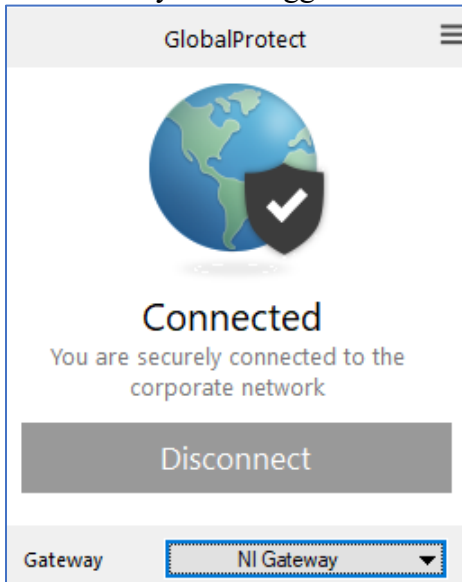
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User Documentation for Content Apps

Logging On:

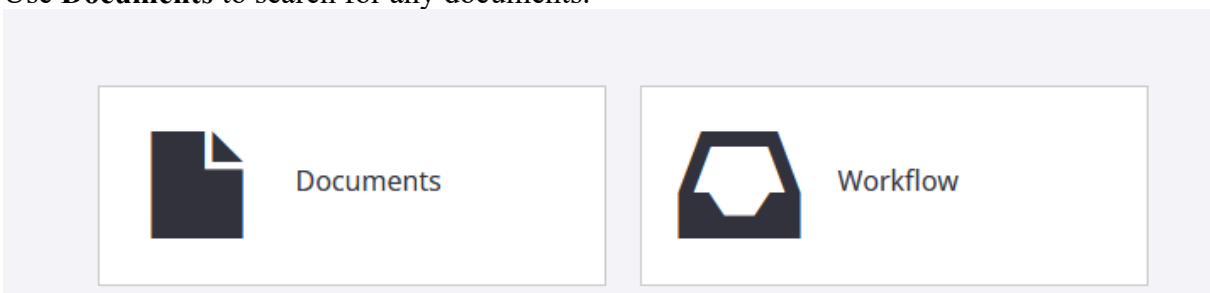
1. Navigate to <https://perceptive.gatech.edu/contentapps> using any browser.
2. Ensure that you are logged into the GT VPN.



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



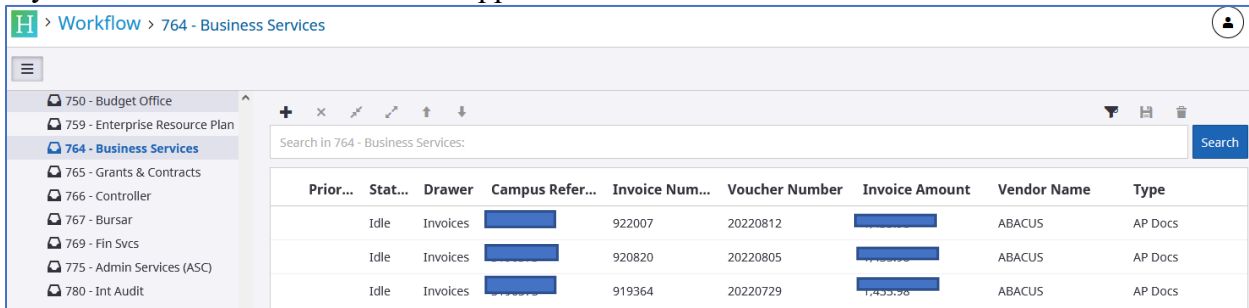
4. You will be taken to the Home Page, shown below:
Use **Workflow** to see documents in your queues needing action.
Use **Documents** to search for any documents.



Workflow

Viewing

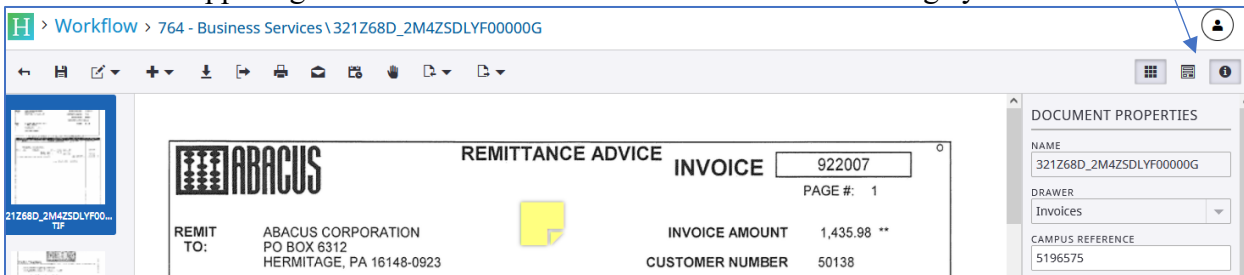
Click on Workflow to see documents in the Workflow Queues that you have access to in the application. It will display the same columns shown in the application.



Click on the first item to open the invoice and determine next steps.

For Screen Viewing Settings:

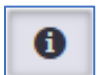
Buttons in the upper right-hand side of the screen can be chosen to change your views.



To Show or Hide Thumbnails in your view.



To Show or Hide Forms in your view.

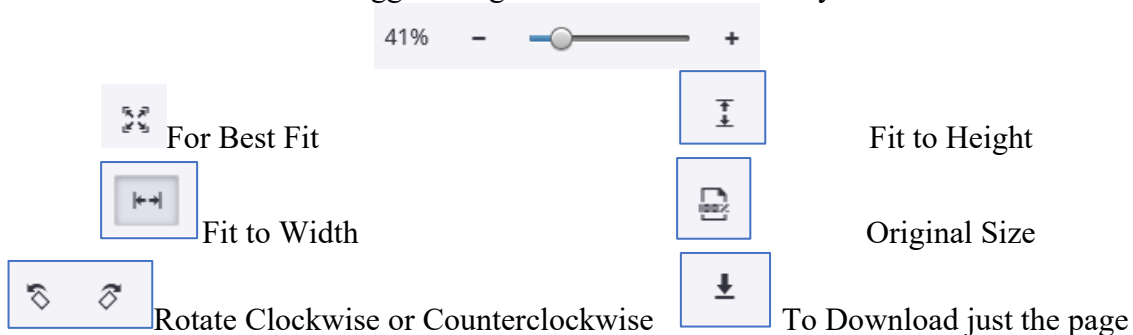


To Show or Hide Document Properties in your view.

Bottom Toolbar To Adjust Views: you can use to go through the pages or alter the document view.

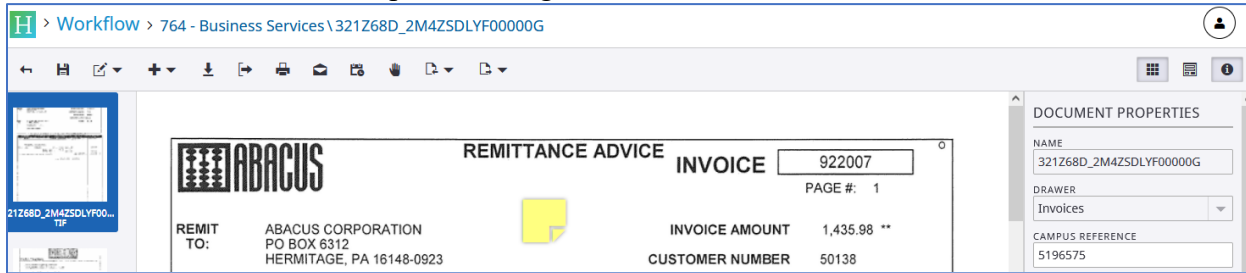


Make the document bigger using the slider bar to choose your Zoom Level.



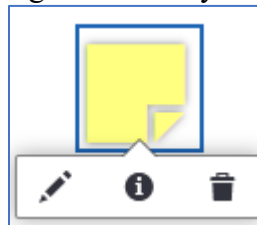
Approving and Routing Invoices

Click on a workflow item to open the image.



The screenshot shows a web application interface for a workflow. The main document is a 'REMITTANCE ADVICE INVOICE' for 'ABACUS CORPORATION'. The invoice number is 922007 and the amount is 1,435.98. A yellow sticky note is placed over the invoice details. On the right, a 'DOCUMENT PROPERTIES' panel shows the document name and campus reference. The browser address bar shows the path: > Workflow > 764 - Business Services \ 321Z68D_2M4ZSDLYF00000G.

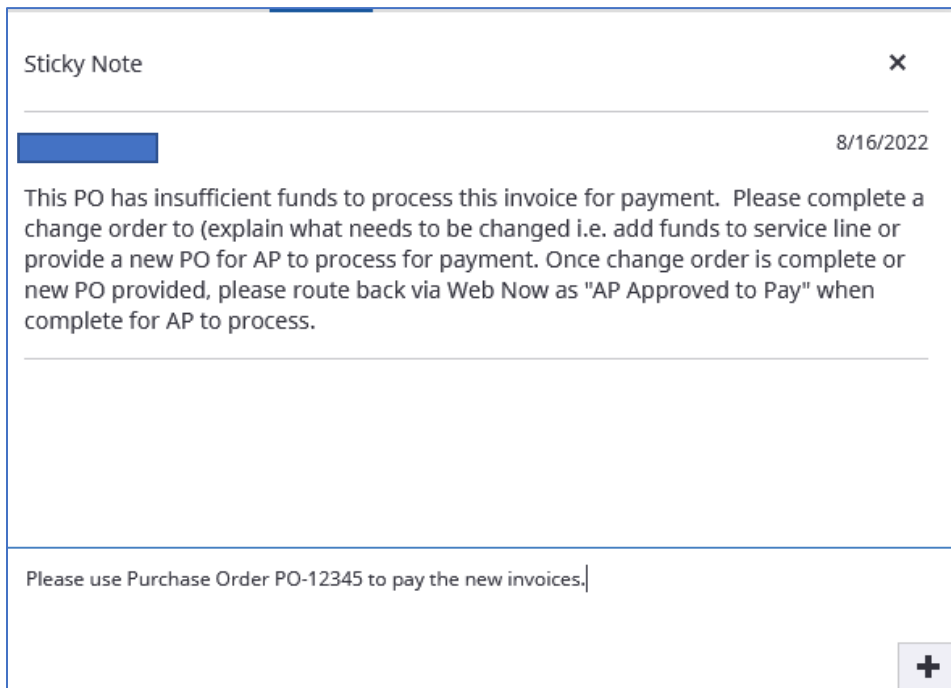
Open the sticky note, by clicking on the sticky note and selecting the Edit Pencil.



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.



The screenshot shows a 'Sticky Note' dialog box. It has a title bar with a close button (X). The note content is: 'This PO has insufficient funds to process this invoice for payment. Please complete a change order to (explain what needs to be changed i.e. add funds to service line or provide a new PO for AP to process for payment. Once change order is complete or new PO provided, please route back via Web Now as "AP Approved to Pay" when complete for AP to process.' The date '8/16/2022' is shown in the top right. At the bottom, there is a text input field containing 'Please use Purchase Order PO-12345 to pay the new invoices,' and a plus sign (+) button to save the note.

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

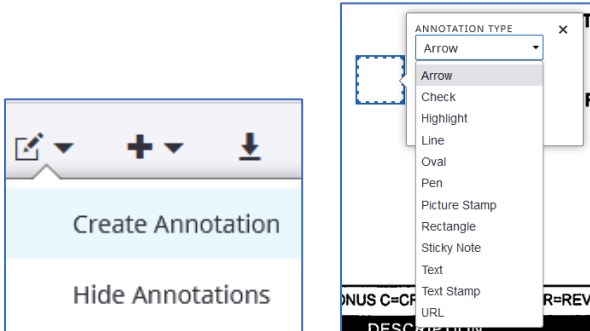
Back Button to return to your Workflow or prior screen:



Save button:

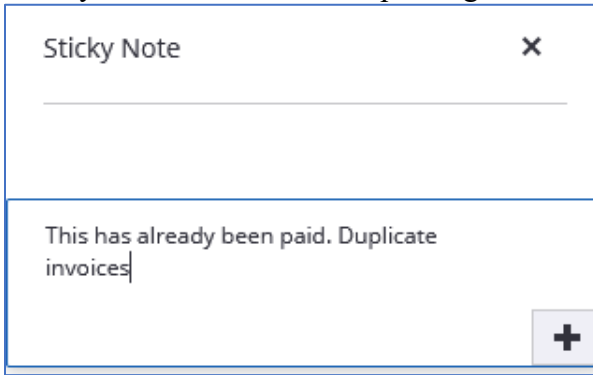


Annotation: IF there is no sticky note, you can create your own.

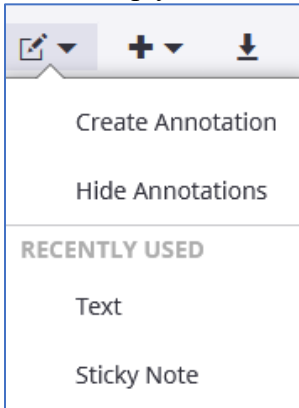


Click on the Annotation Button and Click Create annotation and then place it somewhere on the document and choose your annotation type: Sticky Note and then click Add.

Enter your note and click the plus sign.

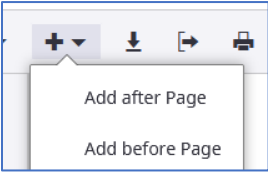


It will keep your recently used annotations ready for you next time!

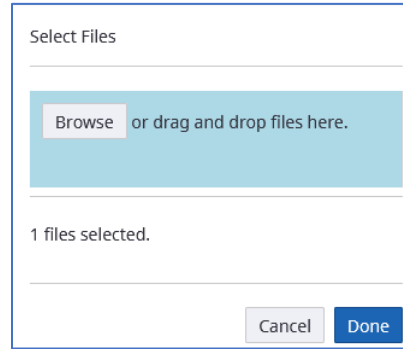
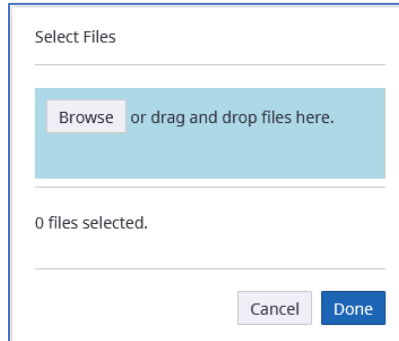
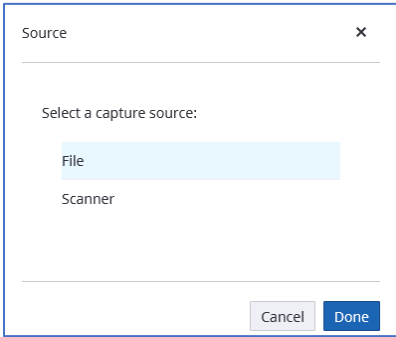




Add supporting documentation by adding pages Click on Add after Page or Add before Page



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



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.

Printing Preferences ×

Convert to PDF

Enable annotations

Include cover page

Page size: Letter

Image width (in pixels):

Image height (in pixels):

Cancel OK

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

Properties

name : 3212685_2M4CCEV0M00000G

drawer : Invoices

drawerId : 301YV6X_0427VQ660000JGS

field1 : 5196575

field2 : 920820

field3 : 20220805

field4 : 1,435.98

field5 : ABACUS

documentType : AP Docs

documentTypeId : 2000000003_00000T2LSWD2

Comments

File: 1 Page: 1 Note:1

This PO has insufficient funds to process this invoice for payment. Please complete a change order to (explain what needs to be changed i.e. add funds to service line or provide a new PO for AP to process for payment. Once change order is complete or new PO provided, please route back via Web Now as "AP Approved to Pay" when complete for AP to process.

Created By: apatel846 Created On: 8/22/2022

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.

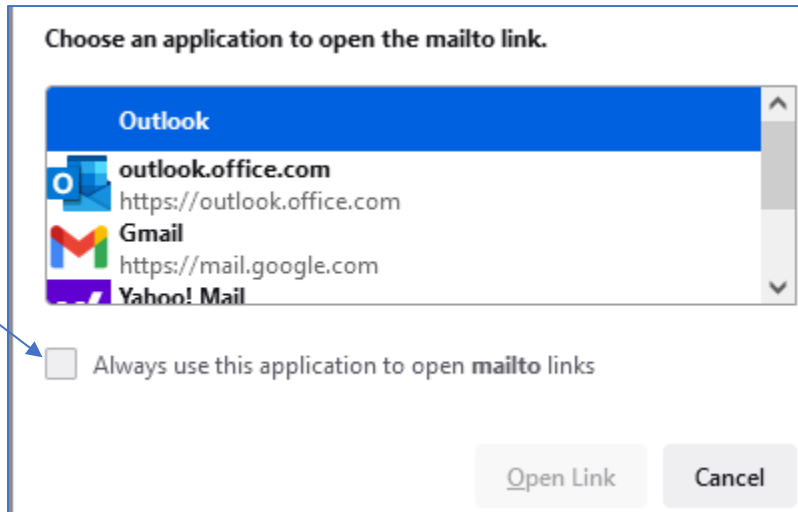


Email a Link to the Document:

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

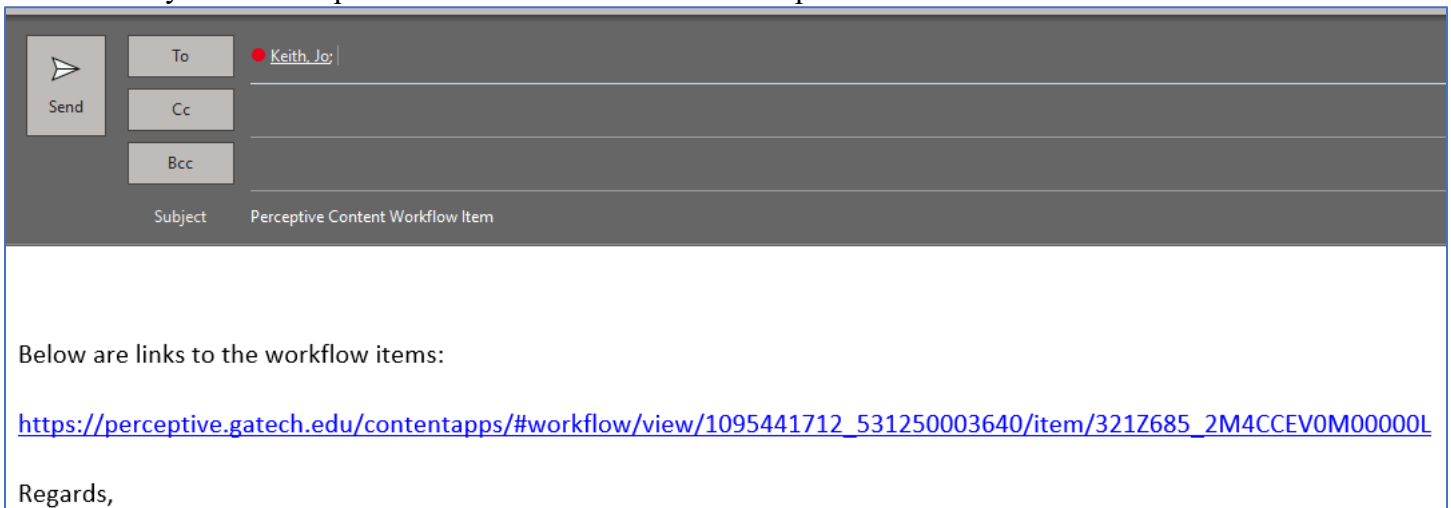
The first time you use, you *may* receive this pop up.

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.



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.



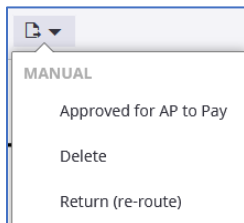
Workflow History Click on View to see history of the document's travels.

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.



Approved for AP to Pay

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.

Delete

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

Return (re-route)

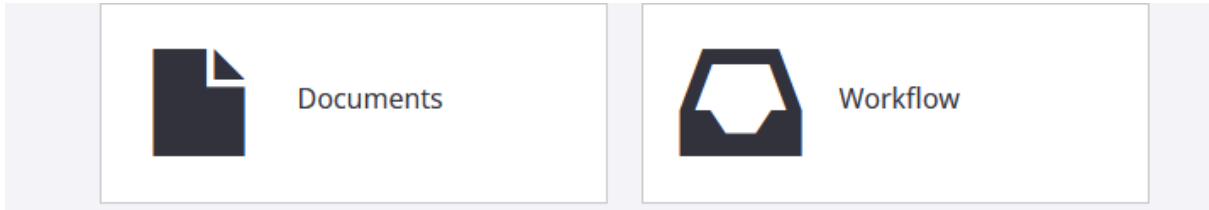
Route invoices to the 'Return (re-route)' queue that were scanned to your queue but are not yours.

These invoices upon their return to AP will be re-routed to the rightful owner.

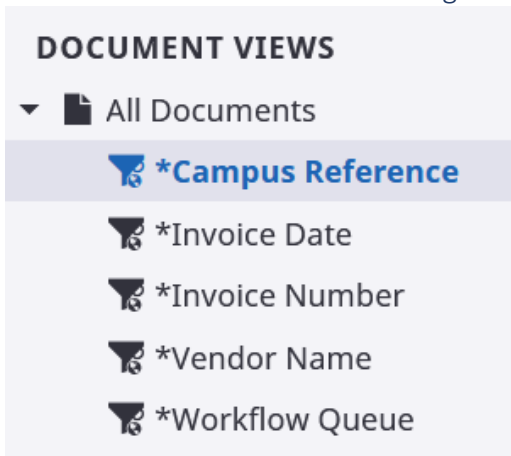
Document Searching:



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

Campus Reference = x

Update Constraint

Normal Constraint Campus Reference equal to

Update Cancel

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.

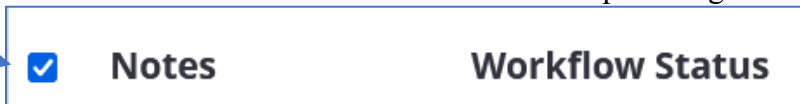
In the search grid, click the document to open it in viewer.

Campus Reference starts with "526171" x Search

Notes	Workflow Status	Campus Reference	Invoice Number	Invoice Date	Invoice Amount
	Idle	5261715	[REDACTED]	20220811	[REDACTED]
	Idle	5261713	[REDACTED]	20220811	[REDACTED]
	Idle	5261716	[REDACTED]	20220811	[REDACTED]



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!

Notes	Workflow Status	Campus Reference	Invoice Number	Invoice Date	Invoice Amount
<input checked="" type="checkbox"/>		2000001680	6032071	00098006	27.61
<input checked="" type="checkbox"/>		2000001680	6032073	00097997	16.75
<input checked="" type="checkbox"/>		2000001792	5610446	00101278	537.32

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.

Add Constraint

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.