

## **Accounts Payable – Perceptive Content Workflow Processing**

### BCO/BCO Assistant Instructions

- A. Login to Perceptive Content eDocs (Page 2)
- B. Scan paper invoice into Perceptive Content (Page 2)
- C. Retrieve items from workflow (Page 3-4)
- D. Add general ledger account # or Purchase order # to invoice image (Page 5-8)
- E. Route invoice to BCO for approval (Page 9)

### BCO Approval Instructions

- A. Login to Perceptive Content eDocs (Page 10)
- B. Add general ledger account # or PO# to invoice image if not done by BCO Assistant (Pages 5-8)
- C. Approve invoice and route to Accounts Payable for processing (Page 11-12)

## BCO ASSISTANT INSTRUCTIONS

Use your myGRCC login and password to login to Perceptive Content eDocs , <https://edocs.grcc.edu>.

### Scan paper invoice into Perceptive Content

- To scan a paper invoice into Perceptive Content, go to GRCC Copy machine and scan an invoice to your email address. Open PDF invoice and click on the print icon and select ImageNow Printer, click print. (Note – You must be logged into Perceptive Content to be able to send to ImageNow)
- Select capture Profile IP\_(Dept)scan/verify click ok. Invoice document will now be in your que for processing

Browser tabs: C:\Program Files (x86)\CreateInfo... accounts payable - Google Group... +

URL: m/viewer/secure/pdf/2sanruki2p7r9ls0qudup503v58ho92/osrqh1b17514bj7te50iagp8dun9mfqc/1693505475000/gmail/01282057057707577999/ACFrOgDsidJMR4N-aiGvSWNeQfsjvzdVdYyYc3yNxthl

Print 1 sheet of paper

Destination ImageNow Printer

Pages All

Copies 1

Color Black and white

More settings

Print Cancel

**ImageNow Print** [X]

Capture Profile

Capture Profile: A-H PO Invoice - IN Printer [v]

Always use this profile

OK Cancel

Once you have logged in to Perceptive, click Workflow -> Invoice Processing-> Verify or Scan/Verify

Now you will see the documents that you need to process.

The screenshot shows the Perceptive workflow interface. The breadcrumb navigation at the top reads 'Workflow > IP\_IT Scan/Verify'. The left sidebar, titled 'WORKFLOW PROCESSES', lists various categories. Under 'Invoice Processing', the item 'IP\_IT Scan/Verify' is highlighted with a red arrow. The main content area displays a table with the following columns: 'Time In Queue', 'Vendor Name', 'FS Invoice Amount', 'FS PO Number', 'Invoice Numb...', 'FS Due Date', 'Invoice Date', and 'Received D'. The table contains 12 rows of data, with the first row showing a 7-hour queue time and a vendor ID of e34f4c82-496a-42e7-86e4-... The interface also includes a search bar at the top of the table area and a '12 Items' indicator at the bottom right.

Time In Queue	Vendor Name	FS Invoice Amount	FS PO Number	Invoice Numb...	FS Due Date	Invoice Date	Received D
7 hours 44 minutes ...	e34f4c82-496a-42e7-86e4-...			PC Connection In...		itinvoice@grcc...	08/30/202...
20 hours 44 minutes	53d8d17c-91d1-4960-a329-...			FW: Invoice L2665...		itinvoice@grcc...	08/29/202...
20 hours 45 minute...	02a2169c-fa06-4085-8736-...			FW: Sassafras Inv...		itinvoice@grcc...	08/29/202...
21 hours 13 minute...	4d3c2076-5eee-4d6d-bdca...			FW: Thank you an...		itinvoice@grcc...	08/29/202...
1 days 7 hours 44 m...	49b35ac6-6d94-4acf-87db...			PC Connection In...		itinvoice@grcc...	08/29/202...
1 days 18 hours 45 ...	fae4128e-b7e7-4295-9f06-...			Dell Inc. Importa...		itinvoice@grcc...	08/28/202...
1 days 18 hours 47 ...	cdee9357-7ec0-45df-87db...			Dell Inc. Importa...		itinvoice@grcc...	08/28/202...
1 days 21 hours 4 m...	03aa4cd6-23db-484f-ae06...			CollegeNET Invoi...		itinvoice@grcc...	08/28/202...
5 days 3 hours 40 m...	ccca1421-0eb5-42be-805c-...			Fwd: Graybar Inv...		itinvoices@grcc...	08/25/202...
5 days 7 hours 44 m...	ef21a16e-f4be-45c9-8fd1-f...			PC Connection In...		itinvoice@grcc...	08/25/202...
6 days 1 hours 21 m...	33dba1da-49ea-45f2-a56e...			FW: Anthology In...		itinvoice@grcc...	08/24/202...
6 days 7 hours 43 m...	9a5bea9b-a018-417f-ac6f-...			PC Connection In...		itinvoice@grcc...	08/24/202...

Double click on item to bring up invoice image.

Workflow > IP\_IT Scan/Verify

1 Selected

WORKFLOW PROCESSES

- Human Resources - App...
- Invoice Processing
  - Academic Applicatio...
  - Asset Management (I...
  - CIO (IP\_IT Approve)
  - Customer Support (I...
  - Enterprise Applicatio...
  - Infrastructure (IP\_IT ...)
  - IP\_IT aaguillon Review
  - IP\_IT Licensing
  - IP\_IT Poss Duplicate ...
  - IP\_IT Scan/Verify**
  - Media Technologies (...)

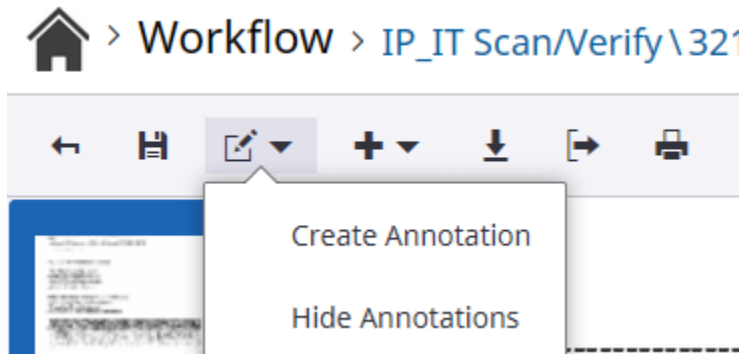
Search In IP\_IT Scan/Verify: [Search]

<input type="checkbox"/>	Time In Queue	Vendor Name	FS Invoice Amount	FS PO Number	Invoice Num...	FS Due Date	Invoice Date	Received D
<input type="checkbox"/>	7 hours 44 minutes ...	e34f4c82-496a-42e7-86e4-...			PC Connection In...		itinvoice@grcc...	08/30/202...
<input checked="" type="checkbox"/>	20 hours 47 minute...	53d8d17c-91d1-4960-a329...			FW: Invoice L2665...		itinvoice@grcc...	08/29/202...
<input type="checkbox"/>	20 hours 45 minute...	02a2169c-fa06-4085-8736-...			FW: Sassafra...		itinvoice@grcc...	08/29/202...
<input type="checkbox"/>	21 hours 13 minute...	4d3c2076-5eee-4d6d-bdca...			FW: Thank you a...		itinvoice@grcc...	08/29/202...
<input type="checkbox"/>	1 days 7 hours 44 m...	49b35ac6-6d94-4acf-87db...			PC Connection In...		itinvoice@grcc...	08/29/202...
<input type="checkbox"/>	1 days 18 hours 45 ...	fae4128e-b7e7-4295-9f06-...			Dell Inc. Importa...		itinvoice@grcc...	08/28/202...
<input type="checkbox"/>	1 days 18 hours 47 ...	cdee9357-7ec0-45df-87db...			Dell Inc. Importa...		itinvoice@grcc...	08/28/202...
<input type="checkbox"/>	1 days 21 hours 4 m...	03aa4cd6-23db-484f-ae06...			CollegeNET Invoi...		itinvoice@grcc...	08/28/202...
<input type="checkbox"/>	5 days 3 hours 40 m...	ccca1421-0eb5-42be-805c-...			Fwd: Graybar Inv...		itinvoices@grcc...	08/25/202...
<input type="checkbox"/>	5 days 7 hours 44 m...	ef21a16e-f4be-45c9-8fd1-f...			PC Connection In...		itinvoice@grcc...	08/25/202...
<input type="checkbox"/>	6 days 1 hours 21 m...	33dba1da-49ea-45f2-a56e...			FW: Anthology In...		itinvoice@grcc...	08/24/202...
<input type="checkbox"/>	6 days 7 hours 43 m...	9a5bea9b-a018-417f-ac6f-...			PC Connection In...		itinvoice@grcc...	08/24/202...

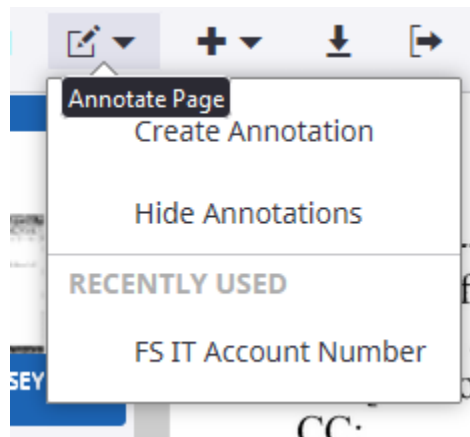
12 Items

Review the invoice and add the appropriate account # or purchase order #.

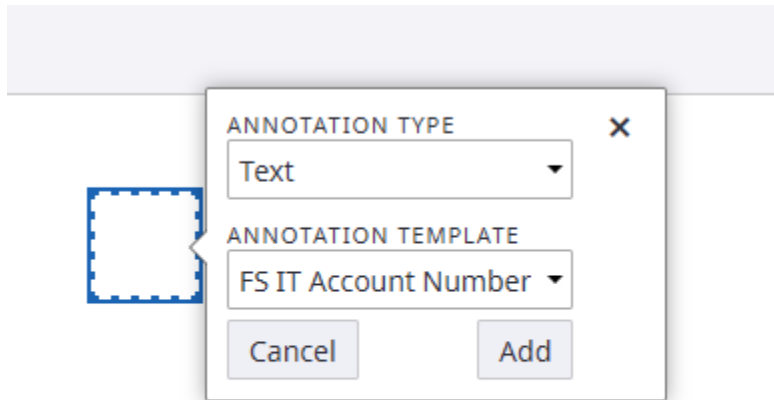
1. Click on the Pencil icon to add a new annotation



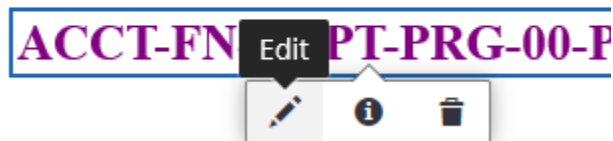
2. Click Create Annotation
  - a. Note, if you have done this recently, you can click directly on the Account number annotation on this drop down, and skip to step 6 after completing step 3.



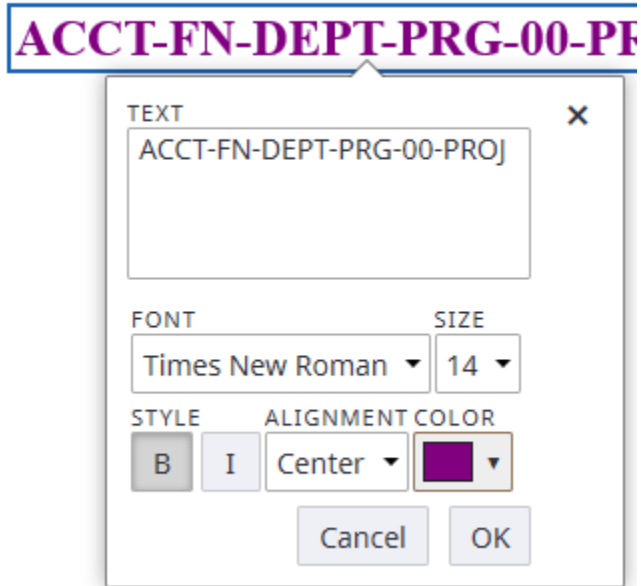
3. Click somewhere on the document
4. Select the Annotation Type **Text**, and Annotation Template **FS Account Number**



5. Click Add
6. If the predefined text is not correct, use the penil icon to Edit the text




7. Type in the correct account number PO#(not the req#) if applicable and any necessary instructions for Accounts Payable if needed
8. Click OK



In the bottom lower corner is custom properties please only fill in FS Vendor Short Name and FS Invoice Amount

**CUSTOM PROPERTIES**

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FS DUE DATE  
MM/DD/YYYY 

FS VOUCHER ID

FS VENDOR SHORT NAME


FS INVOICE AMOUNT

FS PO NUMBER

FS DEPARTMENT  
 

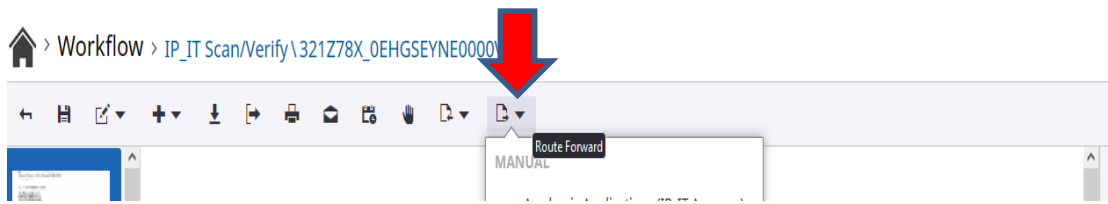
**NOTES**

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- After adding the Account # and filling in the custom Properties, click on the Route Forward Icon, select the appropriate BCO and click Route. The item is now removed from your work queue and an email notification will be sent to the BCO that you selected.

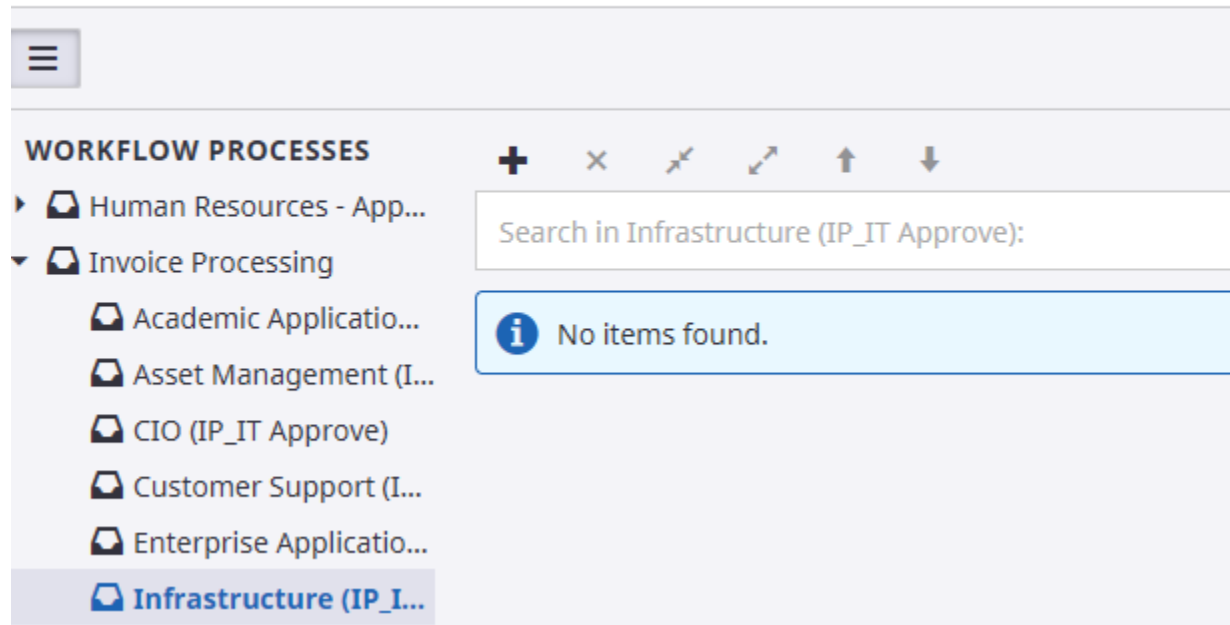


**BCO INSTRUCTIONS**

- Use your myGRCC login and password to login to Perceptive Content eDocs, <https://edocs.grcc.edu>.

Once you have logged in navigate to Workflow -> Invoice Processing -> Approve

 > **Workflow** > **Infrastructure (IP\_IT Approve)**



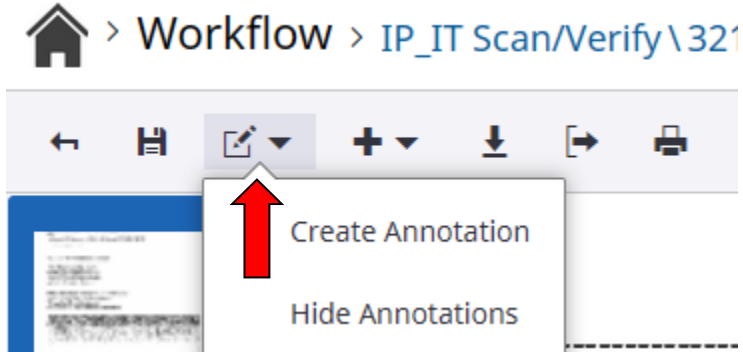
The screenshot displays the 'WORKFLOW PROCESSES' section of the application. On the left, a tree view shows the following processes:

- Human Resources - App...
- Invoice Processing
  - Academic Applicatio...
  - Asset Management (I...
  - CIO (IP\_IT Approve)
  - Customer Support (I...
  - Enterprise Applicatio...
  - Infrastructure (IP\_I...**

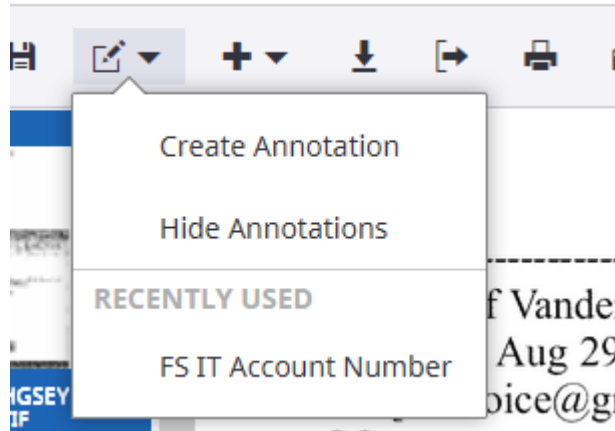
On the right, there is a search bar with the text 'Search in Infrastructure (IP\_IT Approve):'. Below the search bar, a light blue notification box contains an information icon and the text 'No items found.' Above the search bar, there are several icons: a plus sign, a close sign (x), a refresh sign, a zoom-in sign, an up arrow, and a down arrow.

Review the invoice and the account # and/or purchase order #. If OK, then approve invoice for Accounts Payable per instruction below.

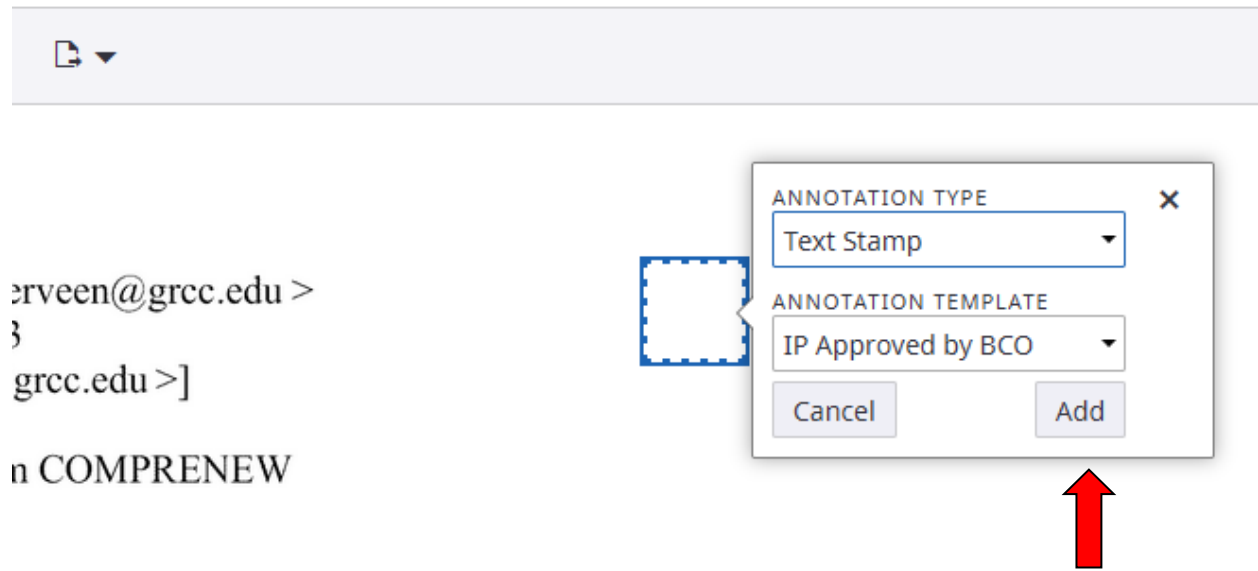
1. Click on the Pencil icon to add a new annotation



2. Click Create Annotation
  - a. Note, if you have done this recently, you can click directly on the Account number annotation on this drop down, and skip to step 6 after completing step 3.



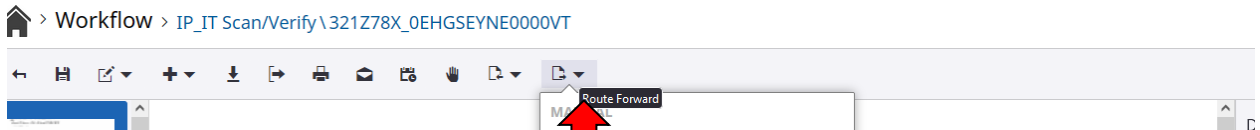
3. Click somewhere on the document
4. Select the Annotation Type **Text Stamp**, and Annotation Template **IP Approved by BCO**



5. Click Add

- Your user id and time approved will be automatically added.

- Click on the Route Forward Icon, and select the **IP Invoice to AP Non PO or PO** queue



- The item is now removed from your work queue and sent to Accounts Payable