User Documentation for WebNow 6.7

Contents
Logging On: .................................................................................................................................... 2
Selecting your Settings, Defaults, Columns and Worksheet: ......................................................... 3
Document Searching: ...................................................................................................................... 7
Workflow – Approving and Routing Invoices.................................................................................. 10
Emailing a WebNow Link: ........................................................................................................... 13
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Logging On:

1. Go https://www.webnow.gatech.edu/webnow/ Using Internet Explorer or FireFox. You will also need to have the latest version of Java on your PC.

2. This will launch the WebNow login page: Login to WebNow using your Kerberos credentials, this is the same combination used for Techworks.

3. You will be taken to the WebNow main page, shown below: Note: there are different levels of use; therefore each main page reflects only the icons you can access. Icons most commonly displayed are the documents, projects and workflow icons.
Selecting your Settings, Defaults, Columns and Worksheet:

1. Click on the ‘Options’ button in the top right hand corner to change your settings and default preferences

2. An ‘Explorer Options’ dialog box will pop up with Options on the Left Hand side. This can be customized by the user to obtain the desired user preferences. They should only have to be changed once.

3. Suggestions under:
   - General Tab
     a. Application Plan = Peoplesoft88
   - Toolbar Tab
     a. Documents = All Documents
     b. Workflow = (to your workflow queue)

Use the drop down arrow to make your selections

All other settings are up to the user’s preferences.
4. Adding/Deleting Columns:

WebNow displays many columns of information. Some of the columns displayed contain no information or information that might not be useful to you. Click on the ‘Columns’ button to select or deselect the columns you want displayed.

Column heading suggestions for a document search

(Click on documents icon then the columns button to bring up the ‘columns’ dialog box)
In addition to the boxes checked above, another selection that is very useful to display is ‘workflow queue’. Select this column by scrolling down the list.

Column heading suggestions for workflow
(Click on workflow icon then the columns button to bring up the ‘columns’ dialog box)
Applies to workflow users only:

5. Selecting the Invoice Approval Worksheet (e-form).

If your ‘Invoice Approval Worksheet’ is not being displayed, select ‘View’ from the menu bar, then select ‘Worksheet’ or you can press the F12 key on your keyboard.

After selecting the Worksheet your screen should look like the panel below.
Document Searching:

1. Double click on the ‘Documents’ icon located at the top of the WebNow main page.

There are two ways to search for the documents we scan. You can search for a document using a quick search or using multiple conditions search.

2. Perform a quick search

A ‘Quick Search’ applies a single condition to the documents in the current view and returns the documents that satisfy that condition. You define the condition in the Quick Search tab, which includes the property list, operator list, and value box, and the Go button, shown below.

The set of operators and the method for selecting the value vary with the selection you make in the property list.

   a. In the property list, select the index key, such as Campus Reference, Voucher Number, Vendor Name, etc. This is the property or field in each document that will be inspected by the search.
   b. 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 below.
   c. In the value box, select or type a value to be compared to the value in the property field, such as 8300014000 for the PO # or Dell for the Vendor Name.
   d. Click the Go button.
   e. In the search grid, double-click the document to open it in WebNow viewer.
3. **Search with multiple conditions**

This procedure is nearly identical to creating a private filter or query.

![Add Condition Dialog](image)

- In the **Search** tab, click the **Add** button.
- In the **Add Condition** 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’ – between the value in the field selected in step c. and the target value you define in step e.
- In **Value** box, enter or select the target value to which the operator in step d. will be applied.
- Click **OK**
- Repeat steps a.-f. 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.
4. Changing the default search ‘View’

Your default view is ‘All documents’ this search will retrieve all of the documents that are available to your user account.

You can change this view to a specific document type by clicking on the drop down menu next to ‘all documents’ (red arrow on the left) or by clicking on the view icon, (red arrow on the right) which will open the ‘Views Pane’, seen on the left, for you to make your selection.
Workflow – Approving and Routing Invoices

1. Double click on the ‘Workflow’ icon located at the top of the WebNow main page.

2. Your workflow table grid will appear on your screen. The grid contains line item detail of the invoices in your queue.

3. Double click on a workflow item to open the image.

4. If your ‘Invoice Payment Approval Worksheet’ is not being displayed, select ‘View’ from the menu bar, then select ‘Worksheet’ or you can press the F12 key on your keyboard. (Refer to page 5 and 6 of this user guide)
5. Approving your Invoice – Complete the value fields and click on the ‘Approve Invoice’ button prior to ‘Routing Forward’ to the ‘Pay Queue’.

Note clicking on the ‘approve invoice’ button populates the ‘Approved by’ box with your userid, date and time. **This is an important step**! This is your signature giving Accounts Payable the approval they need to pay the invoice.
6. If you don’t already have the funds encumbered or the encumbrance needs to be changed, for this invoice, you must go into Peoplesoft and generate a DPO or Change Letter prior to ‘Routing Forward’ to Accounts Payable. Type in the ‘Notes’ section, on the ‘Invoice Approval’ worksheet that a DPO or Change Letter have been submitted and the date of the request.

7. Routing the Invoice Forward

![Route Forward dialog box]

8. Click on the ‘Route Forward’ icon located below the invoice. This will bring up the ‘Route Forward’ dialog box. You will notice you have three choices. In this dialog box you are communicating with Accounts Payable on all choices. Below is an explanation of what items should be routed to each of these queues.

**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

**Pay**
Route invoices to the ‘Pay’ queue that are electronically approved for payment. These invoices will go to the AP Pay Desk to voucher and remit payment to the vendor.

**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.
Emailing a WebNow Link:

1. When looking at an image, click on the email icon on the WebNow toolbar.

   ![Image of WebNow toolbar with email icon highlighted]

<table>
<thead>
<tr>
<th>Status</th>
<th>Drawer</th>
<th>Campus Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idle</td>
<td>AP FY09</td>
<td>2730014251</td>
</tr>
<tr>
<td>Idle</td>
<td>AP FY10</td>
<td>2730014251</td>
</tr>
</tbody>
</table>

2. 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 WebNow/ImageNow users will be able to open the link. *An alternative solution for non-user recipients is explained in the next section.*
Exporting Image to File:

1. When looking at an image, click on the export to file icon on the WebNow toolbar.

2. The following dialog box will appear. Select the pages of the document you would like to send, then Click browse and choose where you want to save the image (your desktop is a convenient location, just remember to delete it from your desktop when completed), and select the option of with or without annotations. Click OK.

3. You can then email this image as a normal attachment, if needed.