Electronic Invoice Approval via Perceptive Content

Offices of Financial Services and Information Technology Services
Updated 8/31/17
Access Perceptive Content:

- Access the Perceptive Content web client called WebNow via email link if available, or open a browser and navigate to the following address:

  http://ccu-inowcontent.coastal.edu:8080/webnow/

Notes:

- You must use Internet Explorer (Windows users) or Firefox Extended version (Mac users); Macs can install the extended version [here](#).
- Approvals must take place on the campus administrative network or off campus via a VPN connection. Mobile access is currently not available.
- Java must be enabled.

If you are unable to reach the login page for the Perceptive Content web client, please contact the ITS Service Center at extension 5000.

- Log in using your CCU credentials. In the Views area on the left side of the screen, look for the “My Assigned” option under “Tasks”. (It may be necessary to expand your view by clicking on the + sign next to the word Tasks.)

Perceptive Content

- A list of invoices needing approval will be displayed. Double-click to open a document.

Note: Only one approval at each approval level is required by the system. If you log in via email link and find there is nothing displayed in the “My Assigned” Task view it indicates that another approver at your approval level has already resolved the invoice.
Access Perceptive Content - continued:

- At the bottom of the right side of the screen, confirm that both the “Tasks” and “Properties” tabs are displayed.

- If one or both is missing, access the “View” menu from the top of the screen. Ensure that both options are checked.
Access Perceptive Content - continued:

- Review the invoice.

The zoom in and zoom out buttons are included in a toolbar at the top of the screen.

If the invoice consists of multiple pages, you will find the paging options at the bottom of the screen under the document.

Window borders can be dragged to resize as needed.
For Division Admins

- Click on the **Properties** Tab (bottom right hand of screen).
- Locate the **AP – Account Number 1** field and enter the appropriate account number from which the invoice should be paid. This is formatted as fund-GL account (minus object code). (example: 10-5555)
  - If the invoice will be paid from multiple accounts **within the same department**, enter AP – Account Number 2, etc. as needed.

**This information will be used to route the invoice forward for approval based on chart of accounts configuration.**

This ends this section of division admin specific information.
**Optional - Sticky Notes and Comments**

Sticky notes are visible by the department approval team and the Accounts Payable staff. Comments are visible only by the Accounts Payable staff.

- To add a **sticky note**, click on the sticky note icon displayed in the toolbar and then click the first page of the invoice near the top right corner. A new window will open. Type the necessary information and click “Add”. Your username and time stamp will be automatically logged by the system.

- To add a **comment**, click on the Tasks tab in the bottom right of the screen to toggle to the Tasks pane. At the top you will see a Comments area. Click the Add… button. In the window that opens, type the appropriate text and click “Add”. Your username and time stamp will be automatically logged by the system.

**Note:** If you have made arrangements with another area on campus to share payment of an invoice between departments, please enter this information in both a sticky note and a comment.

- To add **text**, click on the T button displayed in the toolbar and then click on the invoice image where you would like the text placed. A new window will open. Type in text and click ok. The sample below displays how the added text will appear. Text can be dragged to a new location as needed.

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**Invoice for Student Event**

[Invoice Image]

**INVOICE**

Vendor Name: Vendor Name
Vendor Address: Martin Beach, SC 29537
(800) 555-5535 vendor@gmail.com

DATE: May 30, 2016
INVOICE #: INVOICE1234
**Optional - Adding Supporting Documentation:**

You may append supporting electronic documentation to an invoice by choosing the “Capture from Disk...” option on the File menu. Browse to the location of the document when prompted. Click the Capture button. The captured document will be appended to the end of the invoice. Use the arrows below the image to advance to the end of the document to confirm.
Optional – Export Document:
You may export a copy of the imaged document by choosing the “Export” option on the File menu. In the window that opens, use the Browse... button to select where the files should be deposited. Select the pages you wish to export and choose to include or exclude annotations. Click ok to begin the export.
**Save your work!**

Each time you make a change to the invoice, please click on the Save button located in the toolbar in the top left portion of the screen.

**Invoice Decision**

There are two decision options: Complete and Return

The “Complete” button is used to indicate *approval*.

The “Return” button is used to indicate the *rejected* decision.

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Click the “Complete” button to approve the invoice. The next level of your approval team, based on the chart of accounts configuration, will then be notified via email that there is an invoice awaiting their review. When reaching the end of the approval list, the invoice will automatically route to Accounts Payable for processing.

Note: If you are the division admin and are also an authorized approver you will process the invoice twice to satisfy each role. Clicking complete will generate a second approval task. Access the invoice document and click “Complete” again.
The “Return” button is used for the less common decision of reject.

Examples of appropriate uses for the Return decision:

- An invoice has been incorrectly routed to your area.
- You receive an invoice for an item/service you wish to pay by P-Card.

To return an invoice to University Accounts Payable click on the return button and choose the most appropriate reason option from the drop down list provided. Enter explanatory information in the comments area. Your username and time stamp will be automatically logged by the system.

Note: Upon submitting a decision of Complete or Return the system will automatically open the next invoice in the list of assigned tasks for your review. If there are no other pending invoices, a message will display stating that you have completed all assigned tasks.
Optional - View Your Completed Tasks:

You may retrieve an invoice that you have completed for the purpose of viewing or exporting by clicking on the “Complete” option under the Tasks View. In the first drop down menu in the Quick Search to the right, choose “Assigned to”. In the third drop down menu, choose your username. If not found click on “More...” at the bottom of the list to launch the user selection tool. (In this case you will receive a new window. Type in your user name and click on the Search button. Click on your username in the list that appears and click Ok.)

Click on the green Go button to initiate the search. A list of your completed invoices will appear. Double click to open a document.
For Division Admins

Admins will have the ability to view invoices approved in their division. Under the “Documents” view, click on the “AP Approved Invoices” option. A list of invoice documents will automatically be retrieved for viewing purposes. Double click on a document to open it.

For Division Admins

Invoice Submission

Vendors have been directed by Accounts Payable to submit invoices to the email address apinvoices@coastal.edu for processing.

This should limit the number of invoices received directly in the University departments. University departments may also submit invoices received to apinvoices@coastal.edu.

For questions regarding the electronic invoice approval process, please contact:

Accounts Payable Supervisor

843-349-2060   ap@coastal.edu