Electronic Invoice Approval
Perceptive Content Guide

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Invoices are approved based on an approval matrix predetermined by the Office of Financial Services. Once an invoice has been received by the Office of Financial Services, the department admin will receive an electronic ‘task’ to update the invoice with the appropriate account numbers and/or supporting documentation. Next, the system will check if the invoice needs additional approval(s) and route appropriately. Once an invoice has been fully approved, the invoice will be routed to the Office of Financial Services where payment will be issued.

Specifically, there are two primary roles when approving invoices:

- **Division Admin** – updates invoice properties; acts as first approval; can view current and historical invoices for entire division
- **Approver** – acts as next level of approval (as deemed necessary)

**How to Submit an Invoice for Payment**

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.
Perceptive Content Overview

Perceptive Content (formerly called ImageNow) is a dynamic content management system. In a nutshell, it is software that allows us to manage documents electronically throughout our campus. We can store and retrieve documents, send documents to other users, complete tasks like approving invoice, and sign and approve forms like graduation and graduate admission applications - all electronically. The following workflows are examples of processes supported by Perceptive Content at Coastal Carolina University:

- Undergraduate Admissions
- Graduate Admissions
- Graduation Application (Registrar’s Office)
- Office of the Registrar
- Office of Student Accounts
- Financial Aid & Scholarships
- Accounts Payable
- Payroll

This documentation guide will focus on the Accounts Payable process within Perceptive Content.

Logging into Perceptive Content

Access the Perceptive Content web client called Perceptive Experience by navigating to https://docs.coastal.edu. This application is set up to use Single Sign On (SSO).

Helpful Tips:

- Use Google Chrome or Safari to access Perceptive Content. Internet Explorer and older browsers are not supported.

- If you experience any login issues, try clearing your cache in your web browser (for instructions: http://clearyourcache.com/), then close all browser windows and try again.

- If you continue to experience login issues, please open an ITS Support ticket under Imaging (Perceptive Content) Services category.

Apps in Perceptive

Once you successfully log into the system, Perceptive Content will display available apps on the Home screen:

Tip: You do not need to use the Capture app or the Workflow app when approving invoices.

Tip: View historical invoices using the Documents app (for Division Admins only).

Tip: AP invoices are approved using the Task app.

Tip: You can always click the icon to be directed back to the Home screen to select a different app.
**Using the Documents App**
Users can search and view historical invoices using this app. Think of this app as viewing documents in a ‘filing cabinet’.

Use the Documents App in the following scenarios:

- If you want to look up historical invoices and you are a designated division admin

**Using the Task App**
A task is simply work that has been to you to complete. This allows you to approve or deny an invoice electronically instead of shuffling papers around from one office to the next.

Use the Task App in the following scenarios:

- If you need to approve or reject an invoice
How to Review an Invoice

1. Using the Tasks App, simply click on the desired task under My Assigned.

2. View the invoice for accuracy.

- If you cannot see the invoice, then you need to toggle the document viewer on:

- If you cannot see Related Documents/Tasks or Properties, then you need to toggle the appropriate viewer. The toolbar may be grouped under a ▼ if there isn’t sufficient room to display in your browser.
3. Division Admins need to update invoice properties, including assigning the appropriate account number for payment using Properties.

4. Optional. Add any necessary notes or complete highlights on the document (also known as adding an annotation).

5. Optional. You may want to upload supporting documentation, like emails or other attachments.

6. Optional. Export to PDF to download a PDF of the invoice.

   Note: Do not use Download Document (It may not download as PDF)

   Retrieve PDF from Downloads (or as appropriate)

7. Make a decision. There are two potential options:

   - **Complete** 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.

   OR

   - **Return** Click on the Return button to deny the invoice. 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.

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**Division Admin: How to Assign**
Account/Project Numbers to an Invoice

Division Admins should update the document Properties as appropriate using the task app.

Tip: If you cannot see Properties, then you need to toggle the appropriate viewer on the upper right-hand side of your screen:

- OR - The toolbar may be grouped under a ▼ if there isn’t sufficient room to display in your browser.

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

Account numbers should be 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.
**How to View Related Documents/Tasks**

1. If you cannot see any related content, select Show or Hide Related Documents or Related Tasks as appropriate. You may drag a pane’s perimeter to resize accordingly.

2. For Related Documents, select the desired relationship from the list (if available).

Note: Based on your role, you may see more or less relationships.

3. For Related Tasks, a list of all current tasks associated with the invoice will appear.

**How to Add Annotations**

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

1. To create an annotation, select Create Annotation under icon.

2. Move your curser to desired location on the document and Click on the document.

3. Choose the appropriate Annotation Type and Annotation Template.

   Tip: Based on permissions, you may see multiple Annotation Templates for certain annotation types.

   Tip: If creating a Sticky Note Annotation Type, be sure to use the AP Sticky Note Annotation Template.

4. Optional. To delete an annotation in the event of an error, simply select the annotation and click the Trash icon.
How to Upload Supporting Documentation

1. Select **Add Page** and select **Add after Page**

2. Click on **File** and click **Done** *(or double-click File)*.

3. Click **Browse** and navigate to stored file location.

4. You should receive a confirmation:
   - The page is added successfully. **More ...**
Division Admin: How to Search Historical Invoices

1. Click the Documents App from the Home Screen.
2. Click and expand the appropriate Document View on the left-hand side of the screen.

3. Select the desired filter (example: screenshot on the right).

   Tip: Views are limited to 500 results

   Tip: The percent symbol % acts as the wildcard.
   Example: %Horry used in By Vendor Name filter will return all invoices that have ‘Horry’ anywhere in the name

   Tip: You can click on header names to sort by that column

Disconnect from Perceptive Content

When exiting the Perceptive Content, click on the Person icon in the top right corner of the window and click on the Power off icon.

Additional Information

For questions, please contact:
The Office of Financial Services
Accounts Payable
843-349-4157
ap@coastal.edu