EFS Look-up of CTS ISO charges within EFS

This look-up will assist you in determining your cost breakdown, matched to the CTS Invoice # (which starts with PROJ for projects. And looks like “PROJ00XXXX” or “INVOXXXX” for AV Equipment).

1. Go to Accounts Payable, locate the center column called “Review Accounts Payable Info” and select “Vouchers”,
2. Next screen select “Accounting Entries”.
3. The header reads: Voucher “Accounting Entries”
   a. First change the business unit to "UMNIS" (for internal sales).
   b. Second enter the voucher, (eg. 01544641). Click “search”
   c. The screen will produce the CTS Invoice that starts with “PROJ00...” or “INVO...” (Write it down or print the screen for use in ImageNow.)

Note: on the “Voucher Accounting Entries” screen, the top half is the search. The bottom half is labeled “Accounting Information” Press the tabs to find a good deal of info about your bill.

Then proceed to the ImageNow repository for PDF’s of your Invoices.
Dept. Look-up & Retrieval-Classroom Technical Services Invoices

RE: Invoice copies CLSR. TECHNICAL SERVICES (CTS), ASR

Dear Fiscal Reviewer of a Classroom Technical Services client,

There is a NEW EASY process to see your CTS Invoices using the EFS ImageNow service. If you have access to ImageNow, you can create a password to gain access to the “T CTS” drawer. EFS Data Security can set you up with a password and then you select the "T CTS View Group" on the ImageNow Production list for CTS invoices. This will allow you to easily access the ImageNow drawer containing the CTS Invoices for your DeptIDs:

By:
- DeptID#
- Invoice Number
- Voucher Number
- Date
- Amount

You will be able to: View, Print, Export, etc... the invoices...(See Attachments)

Try out the NEW EASY ImageNow process of Classroom Technical Services invoice retrieval.

Included are the Forms necessary to get Access to our “T CTS” drawer and instructions on how to access it.

Kind regards,

CTS Bus. Ops. Mgmt. & Staff
Introduction

Classroom Technical Services (CTS) archives its invoices in ImageNow, the University's document imaging software. Departmental approvers who are interested in viewing invoices to verify charges may use WebNow, a web interface for ImageNow.

User Access

Access has been automatically granted for current (FY2010) CTS customers. If you think you’ve misplaced your ImageNow password, please call 1-HELP to reset it.

Launching WebNow and Logging In.

1. Open an internet browser and type in the WebNow URL: https://imagenow.umn.edu/webnow.
2. Enter your X.500 in the User Name field.
3. Enter your ImageNow password in the Password field.
4. Click Connect to initiate the connection.

NOTE: Please make sure the latest version of Java is installed on the computer. Contact your local IT support if you don’t have it.

Selecting Your View

The correct view must be selected before doing any search in order for WebNow to display the correct result. To choose a view, click on “Documents” in the Views pane or click the down arrow next to the Documents icon then choose T CTS Invoices
Quick Search

1. Under the Quick Search tab, click the down drop then select a search criteria. Your options will be "Drawer, PS Voucher ID, Invoice Number, Invoice Date, Invoice Amount, and Dept ID".
2. Select the search operator. Use "is equal to" for fastest result.
3. In the third field, enter the full value of the search criteria such as Dept ID or Voucher ID. Then click the Go button to initiate the search.

![Quick Search Table]

Working with the Document

Select and double click on the search result grid to open the document. As a view user, you are capable of performing the following tasks:

- Browse pages
- E-mail, Print, and Export the document.
- Rotate, Zoom In, and Zoom Out.
- View annotations, if there are any.

Disconnecting from the Server

To disconnect from the ImageNow Server, click the Disconnect icon located on the top-right side of your WebNow window.

Troubleshooting

<table>
<thead>
<tr>
<th>ImageNow errors, issues, and questions</th>
<th>1-HELP (1-4357)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Failed to connect to WebNow due to lack of administrative privilege to install Java Runtime (JRE).</td>
<td>Local IT Support</td>
</tr>
</tbody>
</table>