

IMAGE NOW TRAINING RESOURCES

Updated 4.19.17

Page 1	Index
Page 2	Overview of Image Now / Web Now Contracting and Invoicing System for D&C Facilities
Page 3	Location of Training Resources (and this document)
Page 4-5	Adding a Project Manager or User to the System (form)
Page 6	Setting Up a Capture Profile – First Time User
Page 7	Logging into Image Now
Page 8	Logging into Web Now
Page 9-10	Workflows for Contract Routing and Approval
Page 11	Decoder for Contract Routing – People and Queue Names
Pages 12-20	How to Route a Contract
Pages 21-23	How to Approve / Stamp a Contract
Pages 24-25	How to Email a Document Out of Image Now
Page 26	Workflow for Invoice Routing and Approval
Page 27	Decoder for Invoice Routing – People and Queue Names
Pages 28-31	How to Approve / Stamp an Invoice
Page 32	Return to PM Invoices
Page 33	Interim Help for Invoicing Transition / Vendor Notification
Pages 34-37	Navigating Project, Contract, and Invoice Folders
Pages 38-42	Searching and Filtering
Pages 43-53	Frequently Asked Questions
Page 54	Error Message – Incorrect Server
Pages 55-59	Process Clarifications – Meeting Notes
Pages 60 – 64	Appending – Contract Documents
Pages 65 – 67	Appending – Invoice Documents
Pages 68 – 73	How to Route a Budget Amendment
Pages 74	How to Append a Budget Amendment
Page 75	Budget Amendment Work Flow
Page 76	How to Rename a Capture Profile
Pages 77 – 81	How to Approve a Budget Amendment
Pages 82– 85	Facilities VP Approval of a Budget Amendment
Pages 86 – 87	Resolving Image Quality Issues – Change Setting to Improve Image Quality
Pages 88 - 89	Use of Annotations on Documents: Sticky Notes vs Text and Line Tools
Page 90	Resolving Resolution Issues with Image Now

IMAGE NOW IMPLEMENTATION PLAN

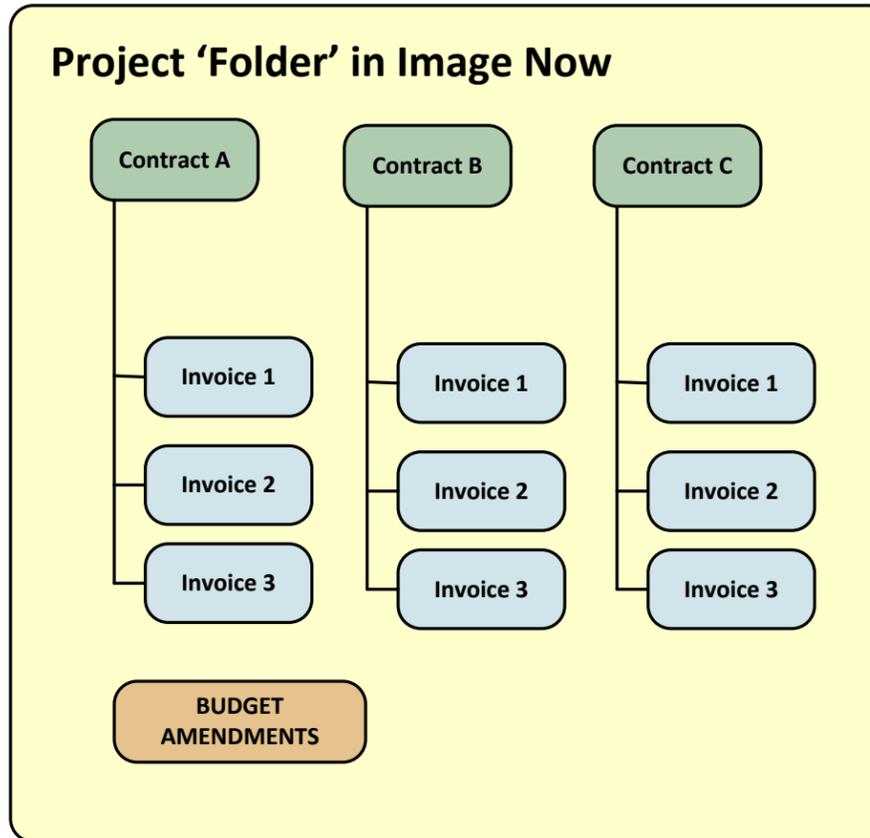
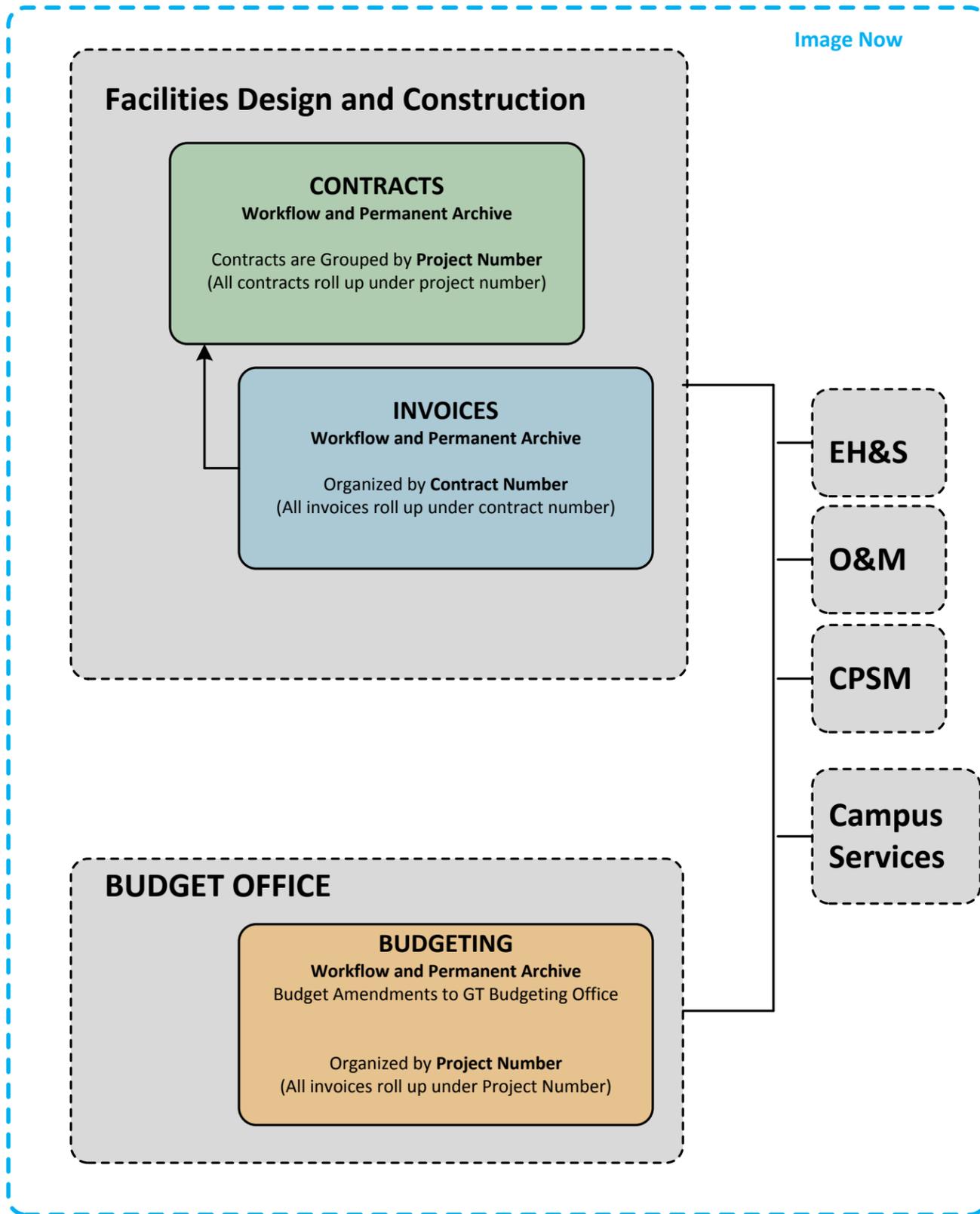


IMAGE NOW / WEBNOW TRAINING RESOURCES

Training Documents for Image Now / Web Now are located on the D&C Facilities Forms Website under the **Training Tab**.

(Hold down the Control button and click to open the link) <http://web1.fac.gatech.edu/projects/forms/>



All Forms Accounting Construction General Purpose Professional Service Project Management Reference Training				
Title	Description	Date	Owner	
1. AIM CPPM Accounting Software				
AIM CPPM - Component and Component Group Account Codes	Reference sheet of all component and component group descriptions and account codes. This is used in AIM CPPM and also in Image Now / Web Now when routing contracts.	2104-07-14	Kim Wilson	
AIM CPPM - How to Open a Capital Project	This training video explains how to open a CPPM project once you are logged into AIM.	2013-02-13	Teresa Corso	
AIM CPPM - How to Print and Export Reports	This training video explains how to print and export reports in the CPPM Module. This requires the user to know how to open a capital project.	2013-02-15	Teresa Corso	
AIM CPPM - Intro to Components	This training video introduces CPPM components, component groups, and demonstrates how to use the Document Routing Form and Budget Worksheet.	2013-02-25	Kimberly Wilson	
AIM Project - How to Update Your Project for BOR Reporting	Instructions for updating key fields in AIM projects, using the in the AIM web interface, to ensure that BOR reporting is up to date when accounting pulls the report.	2014-09-26	John Richardson	
2. AIM - Access to Condition Assessment Reports				
AIM - Facilities Conditions Assessment Reports - How to Access in AIM	Directions on how to access Facilities Conditions Assessment reports in AIM.	2012-05-04	Chuck Lafleur	
3. Image Now / Web Now				
Image Now - Component and Component Group Account Codes	Reference sheet of all component and component group descriptions and account codes. This is used in AIM CPPM and also in Image Now / Web Now when routing contracts.	2014-07-14	Kim Wilson	
Image Now - Facilities FAQs	Ongoing list of frequently asked questions, with responses by Karla, on Web Now / Image Now.	2014-07-14	Kim Wilson	
Image Now - How to Approve a Contract	Instructional handout for those reviewing and approving contracts in Image Now / Web Now. Instructions on how to stamp approval after review.	2014-07-14	Kim Wilson	
Image Now - How to Email a Document with and without Notes	How to email a document out of Image Now (e.g. a contract or invoice) with and without annotations.	2014-07-14	Kim Wilson	
Image Now - How to Route a Contract	How to log into Image Now / Web Now, and how to initiate a contract using Image Now / Web Now. Instructions go over how to print to Image Now.	2014-07-14	Kim Wilson	
Image Now - How to Search and Filter	How to search in Image Now / Web Now, how to filter to improve searching, and the difference between a Document View and a Workflow View.	2014-07-14	Kim Wilson	
Image Now - Implementation Plan and Overview	Graphic illustrating Image Now overall implementation plan and overview.	2014-08-14	Kim Wilson	
Image Now - Invoicing Training for Invoice Approval	Training session handout for best practices for approving invoices.	2014-11-08	Kim Wilson	
Image Now - Set Up - Capture Profile	How to set up a capture profile the first time that you use Image Now / Web Now.	2014-07-14	Kim Wilson	
Image Now - Set Up - Error Message Server Connection	How to correct your Image Now Set up if you receive a message about an incorrect server.	2014-07-14	Kim Wilson	
Image Now - Workflow Document - CONTRACTS INTERNAL SIGNATURE	Workflow document for contracts that are executed by the VP Facilities.	2014-11-08	Kim Wilson	
Image Now - Workflow Document - CONTRACTS OUTSIDE SIGNING AUTHORITY	Workflow document for contracts that are signed by an outside signing authority and require multiple hard copies (e.g. Athletics, GTFAC, BOR, etc.)	2014-11-08	Kim Wilson	
Image Now - Workflow Document - INVOICING	Workflow document for Design & Construction invoices routed in Image Now.	2014-11-08	Kim Wilson	

ImageNow Access Request Form Business Office/Campus Unit Administrator

Name: _____

Job Title: _____ Phone #: _____

Dept. Name: _____ Dept. #: _____

User ID: _____

Email address: _____

Check the security level requested for ImageNow access:

AP Invoices, Purchase Orders, Change Letters, Check Requests, Travel Expense Statements, Journal Entries, Bursar Receipts

Vendor e-Verify Affidavits

User Type: (check all that apply)

Invoice Approver

Document Searcher

The access granted upon approval of this request is governed by Section 5.1.2 of the USG Appropriate Use Policy. As a whole, each individual institution, and its users have an obligation to abide by the policy stated standards of appropriate and ethical use. Any user of any USG system found using its resources for unethical and/or inappropriate practices has violated this policy and is subject to disciplinary proceedings. By signing, I agree to abide by the Institute's Data Access Policy. All sensitive data will be properly secured and protected.

Signature

Date

Signature – (Dean, Director or Department Head)

Date

Printed Name

Title

**PLEASE SCAN AND EMAIL THIS FORM to: Karla Gibson, Karla.gibson@business.gatech.edu
Or Send to: Business Services, MC 0300, fax 4-8552**

For Use by Business Services:

Approved By:

Signature

Date

Access Provided By:

Signature

Date



Example of completed form. This should be sent to Lisa Snyder and Steve Sywak.

ImageNow Access Request Form
Business Office/Campus Unit Administrator

Name: William T. Oswell
Job Title: Architect Phone #: 404-385-3792
Dept. Name: Facilities D&C Dept. #: 902
User ID: WOSWELL3 (the ID# you use to log into a GT website)
Email address: Bill.Oswell@facilities.gatech.edu

Check the security level requested for ImageNow access:

- AP Invoices, Purchase Orders, Change Letters, Check Requests, Travel Expense Statements, Journal Entries, Bursar Receipts
Vendor e-Verify Affidavits

User Type: (check all that apply)

- Invoice Approver
Document Searcher

The access granted upon approval of this request is governed by Section 5.1.2 of the USG Appropriate Use Policy. As a whole, each individual institution, and its users have an obligation to abide by the policy stated standards of appropriate and ethical use.

Signature: William T. Oswell
Signature (Dean, Director or Department Head): GARY JELIN
Printed Name: GARY JELIN

Date: 10-1-14
Date: 10/2/14
Title: ASSOC. DIR DESIGN

PLEASE SCAN AND EMAIL THIS FORM to: Karla Gibson, Karla.gibson@business.gatech.edu
Or Send to: Business Services, MC 0300, fax 4-8552

For Use by Business Services:
Approved By:
Signature Date
Access Provided By:
Signature Date

When you are a first time user, you must set up a profile in order to route a contract.

Facilities Contracts Start Capture Profile

Set up this contract capture on your PC.

1. Log into ImageNow.
2. Click the down arrow to the right of the Capture button.
3. Click on Manage Capture Profiles.
4. Click Create...
5. Create a new profile using the following settings on the 3 tabs.



Facilities Contracts Start - Single

General Single Index Keys

General

Name: Fac Mgmt Contracts

Description:

Type

Source: ImageNow Printer

Set as the default Printer profile

Mode: Single

Submit documents to Content Server

Workflow

Send To: CTR Approval Start

OK Cancel

Facilities Contracts Start - Single

General Single Index Keys

Type:

Application Plan: Fac Mgmt Contracts

Enable Auto Processing

OK Cancel

Facilities Contracts Start - Single

General Single Index Keys

Double-click a row to change the Type and

Document Key	Type	Value
Drawer	Application	Application
Folder	Application	Application
Tab	Application	Application
Field3	Application	Application
Field4	Application	Application
Field5	Application	Application
Doc Type	Application	Application
Notes		

OK Cancel

STEP 1: Opening and Logging into the Image Now Software

- 1) Open the Image Now Software.
(Icon image below.)



- 2) Log in Using your GT log in name and password.
(Not your Facilities log in and password).



**Image Now is software on your machine.
Web Now is the same software but is Web based.**

LOGGING ON TO WEBNOW

Webnow is the website based version of Image Now. If you are an approved user and have completed a form and submitted it to Business Services, you will be able to log in and access documents.

(Hold down the Control button and click to open the link)

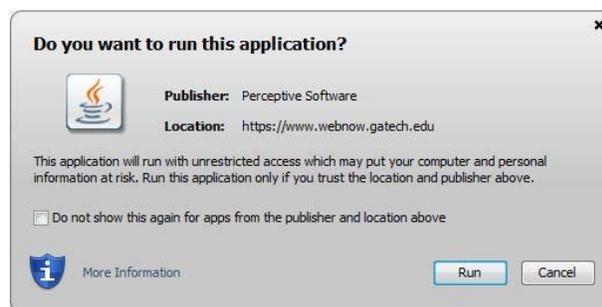
<https://www.webnow.gatech.edu/webnow/index.jsp>

Open Webnow using your browser and the link provided.

Log-In using your Techworks (GT) password and Log-In.

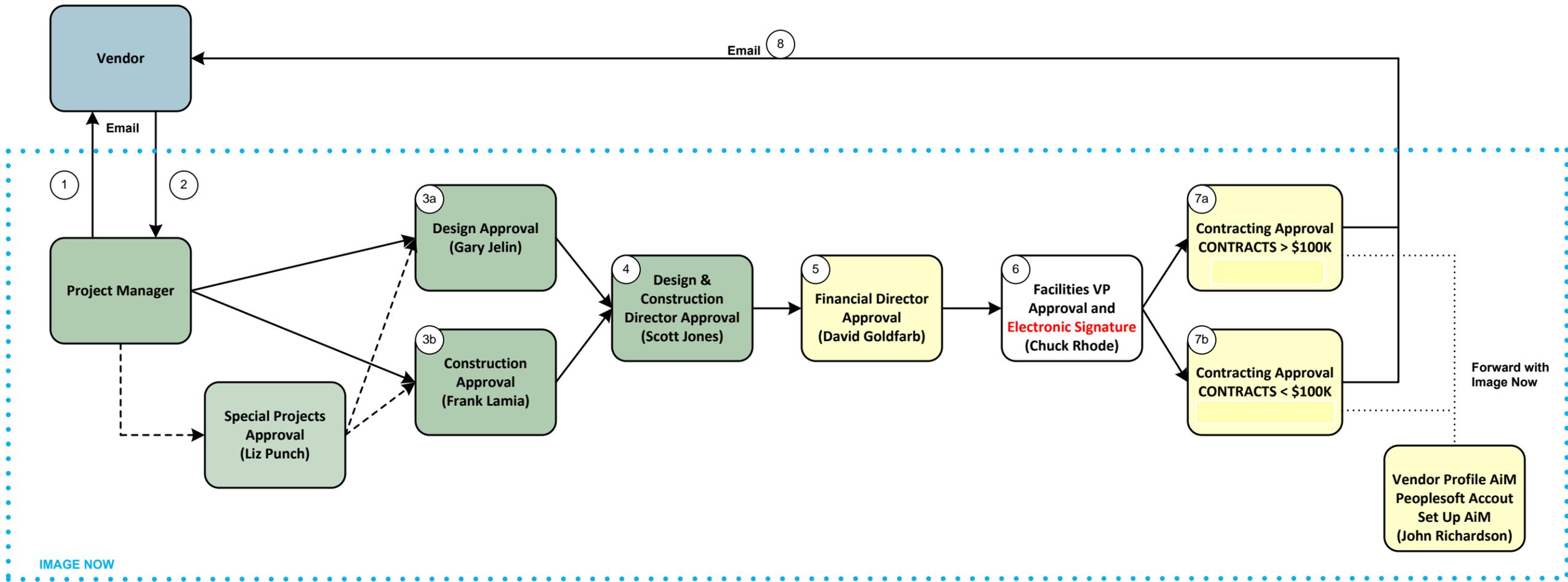


Click RUN if you get this message.....



You may get Java error messages. If so, contact GT Facilities help desk at askit@facilities.gatech.edu

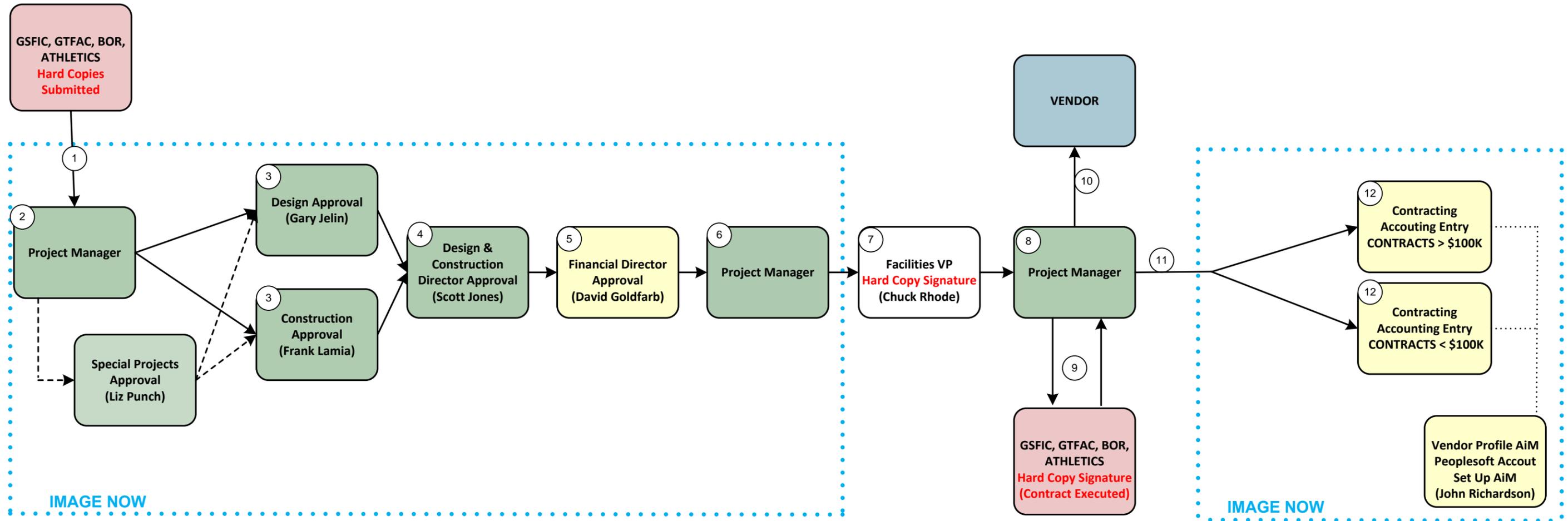
Facilities Contract Routing Work Flow - **Electronic Signature by VP**



FACILITIES CONTRACT ROUTING WORK FLOW

- 1) Project Manager sends electronic copy of contract document to vendor by email.
- 2) Vendor signs in colored ink, scans an electronic copy of contract document back to Project Manager. (If a copy is mailed back, PM can scan to a PDF.) Project Manager prints contract to Image Now and completes contract routing form in Image Now.
- 3 - 5) Image Now routes contracts through Design and Construction, and Finance Director for review and approvals.
- 6) Facilities VP completes electronic and digital signature on contract.
- 7) Image Now routes to Contracting department based upon contract value selected by Project Manager on initial form. Insurance, vendor profiles and other information are finalized prior to approval by Contracting Officer. Contracting officer appends contract with NTP, insurance, and any other supporting documents in Image Now and approves contract.
- 8) Contracting department returns executed contract to vendor by email.

Facilities Contract Routing Work Flow – Contracts Executed Externally, Requiring Hard Copy Signatures



FACILITIES CONTRACT ROUTING WORK FLOW

- 1) Outside Signing Authority sends hardcopies of contract to Project Manager.
- 2) Project Manager scans contract document into Image Now. Project Manager fills out routing form in Image Now.
- 3 – 5) Image Now routes contracts through Design and Construction and Finance Director for review and approvals.
- 6) Image Now routes to **CTR Return to PM - OutsideSign**. PM prints routing form/ stamped cover page, and delivers contract documents with routing form in red folder to Facilities VP for signature.
- 7) Facilities VP signs, and has sealed as required, all copies of contracts.
- 8) Hardcopies of contracts are returned to Project Manager.
- 9) Project Manager sends contract documents out for execution. Contract documents are executed by outside signing authority and returned to Project Manager.
- 10) Project Manager returns executed document to Vendor, as required.
- 11) Project Manager scans signature sheet (only signature sheet) and appends to Image Now. Project Manager releases from **CTR Return to PM – OutsideSign** by routing forward in workflow to either contract administrator in accounting.
- 12) Contracting enters encumbers contract document.

Contracts requiring outside signatures and hard copies will follow this work flow, which requires part of the process to be outside of Image Now.

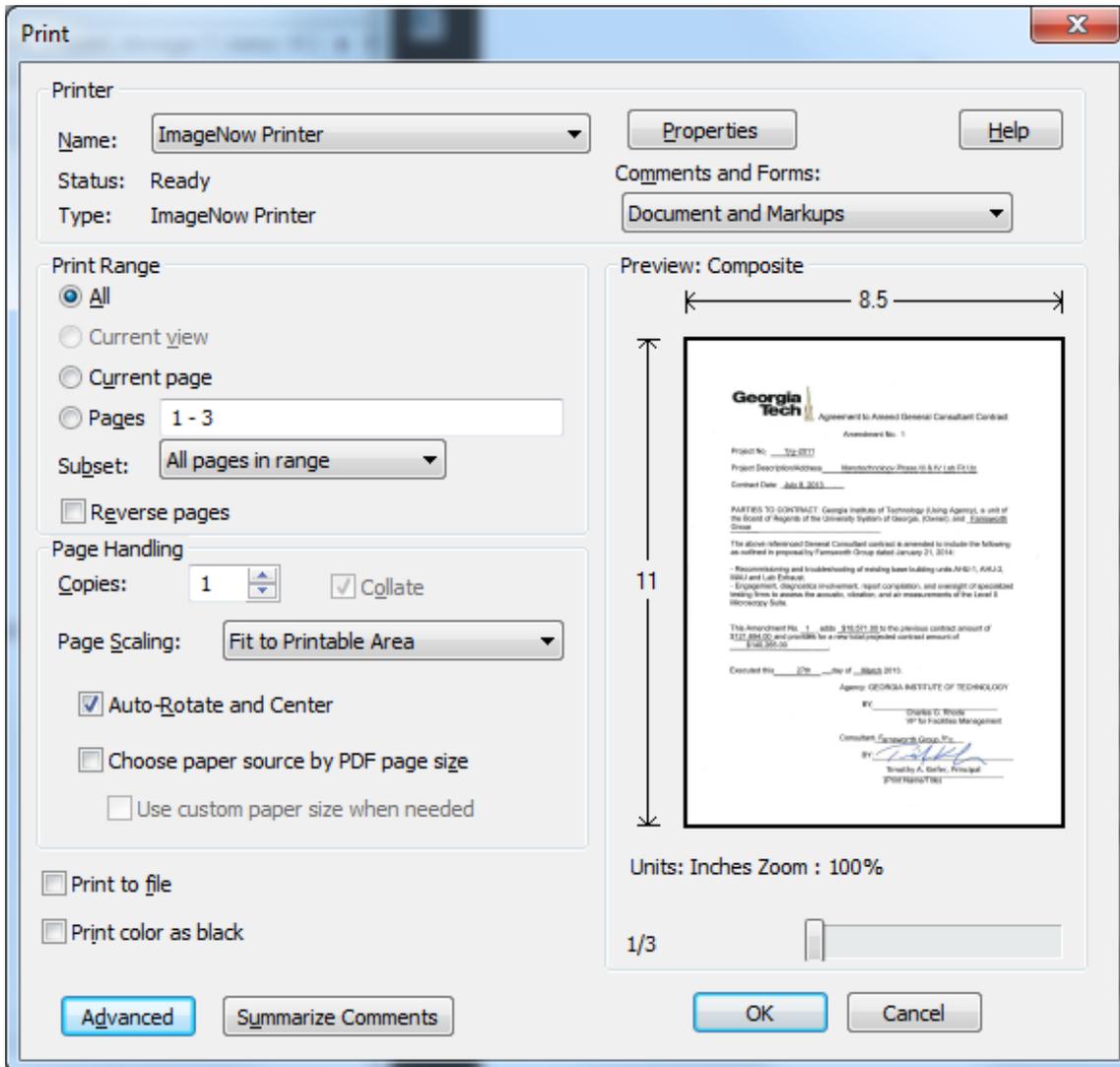
**WORKFLOW QUEUES
DECODER**

CONTRACTING

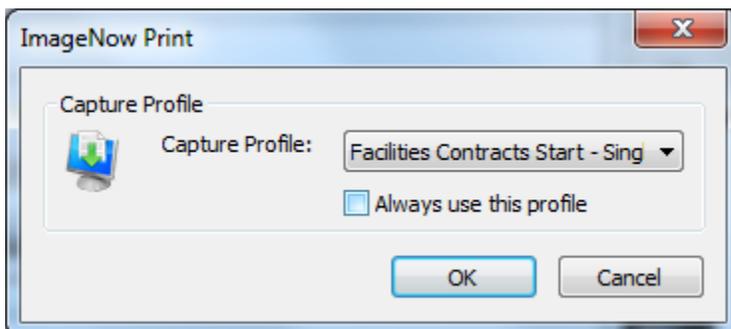
Name of Queue	Person Managing Queue / or Description
CTR Return to PM	Project Manager who initiated the document must address correctios
CTR Return to PM - Outside Signature	Project Manager needs to manage hard copies of a document signed outside of Facilities
CTR Approval Start	Project Manager has started a contract document but it needs more information and won't leave PM queue
CTR Design Approval	Gary Jelin oversight of design related contract documents
CTR Construction Approval	Frank Lamia oversight of construction related contract documents
CTR Campus Services	Kim Wilson oversight of campus services related contract documents
CTR Special Projects	Liz Punch oversight of special projects related contract documents
CTR D&C Director Approval	Scott Jones oversight of all contract documents
CTR Financial Director Approval	David Goldfarb oversight of all contract documents
CTR eSignature	Chuck Rhode oversight of all contract documents
CTR Year End	Contracts that are not approved and put in a Year End queue for consideration with year end funds
CTR eSignature Declined	Scott Jones will manage this queue and consult with PMs on any contracts that are rejected by VP Facilities.
CTR Contract Officer >100K Approval	Donna Vongsouvan contracting officer queue.
CTR Contract Office < 100K Approval	Ericka Thomas contracting officer queue.
CTR Approval Complete	Contracts that are complete.

STEP 2: Printing a Contract to Image Now, and Initiating Routing Process

- 1) Open a PDF copy of the contract signed by the vendor, and print it to Image Now. The PDF should include the vendor quote as back-up. Image Now Printer is an option under Printer, Name pull down:



- 2) If this box pops up, click OK.



STEP 3: Complete Proposed Keys Information:

- 1) The proposed key box will pop up.
- 2) Enter the Project Number, Document Type, Amendment Number, Vendor Name.
- 3) In the Notes section, enter the email address of the vendor so that Accounting can send the executed contract to the vendor.
- 4) Do not fill out: Contract No. field.
- 5) Click Capture.

Proposed Keys

Document Keys

Drawer: Facilities Management

Project No.: 123-2014

Contract No.: Pending

Amendment Type: Original Contract

Amendment #: |

Vendor: Niles Bolton & Associates

Document Type: Fac Mgmt Contracts

Notes: Contact Jim Brown at jbrown@ojparchitect.com with executed contract.

Capture Cancel

PROJECT NUMBERING

0067-2014 (Four digit number + Four Digit Year)

TEX T-2014 (Four digit alpha + Four Digit Year)

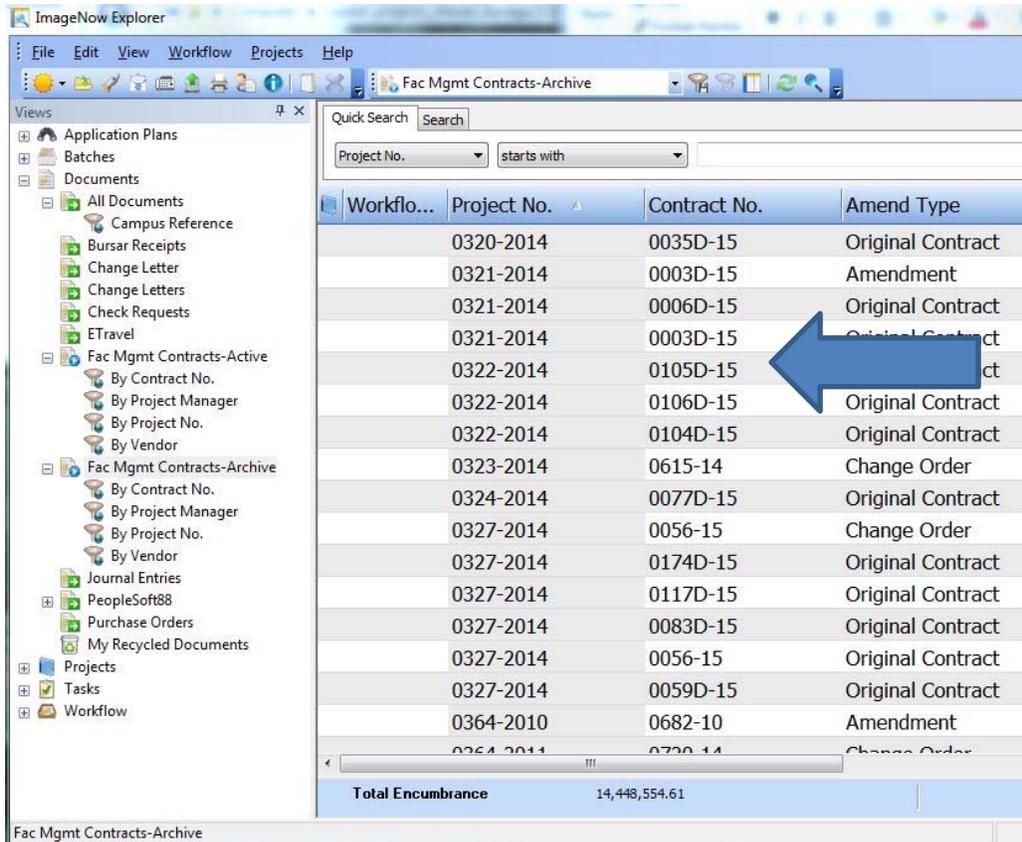
CAPT	CARPET PROGRAM PROJECT
CLAS	CLASSROOM PROGRAM PROJECTS
CVYG	HUMAN & FRIEGHT CONVEYANCE (WORK ON ELEVATORS, LIFTS, ESCALATORS, CONVEYORS, ETC.)
ELBS	ELECTRICAL BUILDING SYSTEM
ELOL	ELECTRICAL OUTSIDE LIGHING
ELSD	ELECTRICAL SERVICE & DISTRIBUTION
ENGY	ENERGY PROJECTS
EXTO	EXTERIOR DOOR AND WINDOW PROJECTS
EXTR	EXTERIOR REMAINDER PROJECTS WORK EXCLUDING WALLS, DOORS, WINDOWS
EXTW	EXTERIOR WALL PROJECTS
FFAE	FURNISHINGS, FIXTURES & EQUIPMENT
FNDN	FOUNDATION PROJECTS
FPES	FIRE PROTECTION EXTINGUISHING SYSTEMS
FPOS	FIRE PROTETION SYSTEMS
HABS	HVAC BUILDING SYSTEM PROJECTS
HACI	HVAC CONTROLS & INSTRUMENTATION
HASC	HVAC STEAM & CHILLED WATER GENERATION PROJECTS
INTR	INTERIOR PROJECTS WORK ON INTERIOR STRUCTURES (WALLS, FINISHES, DOORS, FLOORS, CEILINGS, ETC.)
LAND	LANDSCAPE PROGRAM PROJECTS
MTRG	METERING PROGRAM
OITH	IT INFRASTRUCTURE
PLEX	PLUMBING EXTERIOR
PLIN	PLUMBING INTERIOR
PNTG	PAINTING PROGRAM
ROOF	ROOFING PROJECTS
STRS	STAIR PROJECTS
STWK	SITE WORK PROJECTS
STWK	SITE WORK PROJECTS
WYFN	GENERAL CAMPUS WAY FINDING SIGNAGE

Follow this project numbering system when entering project numbers into Image Now / Web Now.

CONTRACT NUMBERING

0067-14 (Four digit number - Two Digit Year)

0067D-14 (Four digit numbers D – Two Digit Year)



The screenshot shows the ImageNow Explorer interface with a table of contract records. The table has columns for 'Project No.', 'Contract No.', and 'Amend Type'. A blue arrow points to the 'Contract No.' column. The table data is as follows:

Project No.	Contract No.	Amend Type
0320-2014	0035D-15	Original Contract
0321-2014	0003D-15	Amendment
0321-2014	0006D-15	Original Contract
0321-2014	0003D-15	Original Contract
0322-2014	0105D-15	Original Contract
0322-2014	0106D-15	Original Contract
0322-2014	0104D-15	Original Contract
0323-2014	0615-14	Change Order
0324-2014	0077D-15	Original Contract
0327-2014	0056-15	Change Order
0327-2014	0174D-15	Original Contract
0327-2014	0117D-15	Original Contract
0327-2014	0083D-15	Original Contract
0327-2014	0056-15	Original Contract
0327-2014	0059D-15	Original Contract
0364-2010	0682-10	Amendment
0364-2011	0720-11	Change Order

Total Encumbrance: 14,448,554.61

Follow this contract numbering system when entering contract numbers into Image Now / Web Now.
Note: For the original contract, the Contract Administrator will input the contract numbers. The PM only inputs the contract numbers for change orders or amendments.

Complete Custom Properties Information:

- 1) A view of the contract and form screens (on the right) will pop up.
- 2) Fill in the section of the form in the lower right hand corner.

The screenshot displays the ImageNow Viewer interface. The main window shows a scanned document titled "PROFESSIONAL SERVICE CONTRACT" for the "Child Development Center at Georgia Institute of Technology". The document text includes project details, a date of November 12, 2009, and a list of services. On the right side, there is a "Properties" panel with several sections: "Application Plan" (Fac Mgmt Contracts), "Document Keys" (Drawer: Facilities Management, Project No.: 123-2014, Contract No.: Pending, Amendment Type: Original Contract, Amendment #: ---, Vendor: Niles Bolton & Associates, Document Type: Fac Mgmt Contracts), and "Custom Properties" (a table with columns for budget, manager, amount, and optional amounts). At the bottom of the Properties panel is a "Notes" section.

Page 1 of 4

PROFESSIONAL SERVICE CONTRACT

Project Title: **Child Development Center at Georgia Institute of Technology**

Location: Georgia Institute of Technology campus at the Family Apartments (Building No. 180), located at Tenth and Home, Atlanta, Georgia.

Project Number: 305-2008

THIS AGREEMENT MADE THE 12th day of November in the year 2009 between the Board of Regents of the University System of Georgia, hereinafter called the OWNER, and Niles Bolton Associates, hereinafter called the Consultant/Architect/Engineer:

WITNESSETH, that the parties hereto, in consideration of the mutual promises and benefits flowing to each of the parties hereto as hereinafter stated, do mutually agree as follows:

I. BASIC SERVICES:

1. The Consultant/Architect/Engineer will prepare and furnish the Owner, complete and ready for use, including changes as required during the progress of the work, all of the following:
 - A. Architectural Programming / Schematic Design, as described below:
 - i. Meeting to review floor plans and program with stakeholders, excluding engineering team.
 - ii. Incorporation of minor design revisions into SD documents.
 - B. Design Development / Construction Documents
 - C. Bidding and Negotiation
 - D. Rendering and Schematic Design Revisions:
 - i. This scope will be completed as required on an hourly basis.
 - ii. Work will not proceed, unless directed by the Owner.
 - iii. Prior to proceeding, the tasks to be completed and the required hours will be defined and agreed upon by both the Owner and Niles Bolton Associates.
 - E. Clarifications:

The following services are included in the contract scope:

 - i. Kitchen Equipment, and Kitchen Consulting Services,
 - ii. Playground equipment specification.

The following services are excluded from the contract scope:

 - i. Furniture, Fixture, and Equipment specification (excluding kitchen equipment),
 - ii. Licensing and accreditation submission,
 - iii. Construction Contract Administration,
 - iv. LEED Administration and Submission,
 - v. Cost Estimating,
 - vi. As-Built Drawings,
 - vii. Low Voltage, Telephone, Data, Security, Audio/Visual, Television, Paging,
 - viii. Permitting,
 - ix. Presentation Models,
 - x. Marketing Materials / Renderings,

- 3) **Custom Properties:** The following information is required:
- Total Project Budget (greater than or less than 100K? – Yes or No.)
 - Manager Name (select your name)
 - Encumbrance amount
 - Component Group, Component
 - Outside Signing Authority (i.e. GSFIC, BOR, GTFAC, etc.)
 - Design or Construction Review (i.e. Frank or Gary review)
 - Peoplesoft Account Number
 - Amount to Encumber to that Account
 - Note that if the contract is to be split across more than one account, fields are provided to do this. (Account 2, Account 3)
 - Additional notes may be added to accounting or others in the notes section.

Custom Properties	
Total Project Budget > \$100K?	Yes
Manager 1	Kim Wilson
Encumbrance Amount	1,000,000.00
Component Group	Construction
Component	860900 Construction
Outside Sign Auth?	None
Design or Construction Revw?	Construction
PSoft Account 1	9012219
Amount 1	1,000,000.00
PSoft Account 2 (optional)	
Amount 2 (optional)	
PSoft Account 3 (optional)	
Amount 3 (optional)	

Notes	
Vendor contact: Jim Brown at jbrown@aol.com	

You must fill out all info through the first amount line or the contract will not move forward!

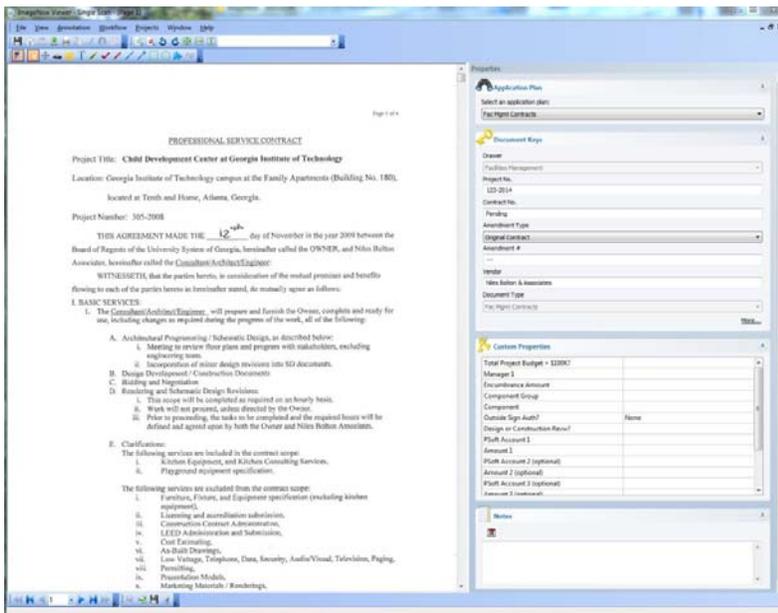
Include the vendor contact email (who will receive the contract) and the page number of the signature in the Notes area. If the contract is a direct award with no signature required, type Direct Award or DA in the Notes section

Final New Expense Accounts 05.01.14 (Component Group Cost Codes)

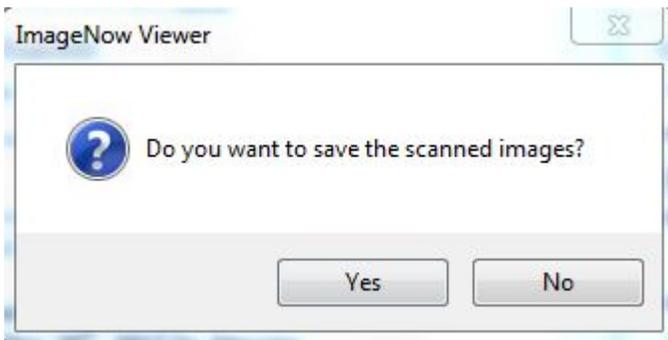
Project Component Group	Account #	Component	Description	Financial Category
CONSTRUCTION				
	860900	CONSTRUCTION	Construction Prime Contract	HARD COSTS
	860901	CONST-ABATEMENT	Abatement Material Removal - Separate Contract from Construction Prime Contract	HARD COSTS
	860902	DEMOLITION	Demolition Work - Separate Contract from Construction Prime Contract	HARD COSTS
	860903	PRE-CONSTRUCTION	Pre-Construction Services - Separate Contract from Construction Prime Contract	HARD COSTS
	860904	SITE DEVELOPMENT	Site Development - Separate Contract from Construction Prime Contract	HARD COSTS
PROJECT OVERSIGHT				
	860910	PROGRAM MANAGER	Program Management Services - External	SOFT COSTS
	860911	PROJECT MANAGER	Project Manager - Staff costs billed by customers to the project (e.g. Campus Services)	SOFT COSTS
	860912	FACILITIES FEES	Facilities Project Management Fees (1% Flat Fee proposed for all Capital Projects billed to campus customers)	SOFT COSTS
	860913	PROJECT OVERHEAD	Project Overhead - External - Flat Fees billed to projects by external customers (e.g. GTFI projects at 0.0075%)	SOFT COSTS
ARCH & ENG SERVICES				
	<i>Basic Design Services</i>			
	860920	PROGRAMMING	Programming (if separate contract from Lead Design contract)	SOFT COSTS
	860921	LEAD DESIGN	Principal Design Contract, Design Lead	SOFT COSTS
	<i>Special Consultants</i>			
	860922	A&E SVCS-ABATEMENT	Abatement Monitoring, Survey, and Design	SOFT COSTS
	860923	ACOUSTICAL CONSULTANT	Acoustical Consultant	SOFT COSTS
	860924	ARBORIST	Arborist Consulting	SOFT COSTS
	860925	AUDIO VISUAL	Audio Visual Design	SOFT COSTS
	860926	COST ESTIMATOR	Cost Estimator	SOFT COSTS
	860927	ENERGY CODE RVW	Energy Code Review	SOFT COSTS
	860928	FOOD SERVICES	Food Service Design Consultant	SOFT COSTS
	860929	LANDSCAPE	Landscape	SOFT COSTS
	860930	LEED	Leed Certification Activities	SOFT COSTS
	860931	PARKING TRAFFIC	Parking and/or Traffic Consultant	SOFT COSTS
	860932	PRE-DESIGN	Pre-Design Consultant	SOFT COSTS
	860933	SECURITY	Security Consultant (site security, building access, etc.)	SOFT COSTS
	860934	SIGNAGE & GRAPHICS	Signage and Graphics Design Consultant	SOFT COSTS
	860935	WATERPROOFING	Waterproofing Consultant	SOFT COSTS
LOOSE EQUIPMENT				
	860940	AUDIO VISUAL	Audio Visual	HARD COSTS
	860941	FFE	Fixtures, Furnishings & Equipment	HARD COSTS
	860942	MOVABLE EQUIPMENT	Movable Equipment	HARD COSTS
	860943	NETWORK ELECTRONICS	Network Electronics	HARD COSTS
TESTING, SURVEY, ETC.				
	860950	ASSESSMENTS	Condition Assessment, Historic Structure Reports, Fire Studies, ESA I & II, GEPA Investigation, HABS, Camera of	SOFT COSTS
	860951	GEOTECHNICAL INVESTIGATION	Geotechnical Investigation - Boring, Soils Testing, Material Testing	SOFT COSTS
	860952	PRINTING	Advertising / Printing / Mailing	SOFT COSTS
	860953	SPECIAL INSPECTION	Special Inspections and Material Testing - When Contracted Outside of AE Contract	SOFT COSTS
	860954	SURVEY	Site Survey Work	SOFT COSTS
	860955	TESTING	Water Flow Testing, etc.	SOFT COSTS
OWNER CONTINGENCY				
	NONE	GSFIC CONTINGENCY	GSFIC Contingency	HARD COSTS
	NONE	OWNER CONTINGENCY	Owner's Contingency	HARD COSTS
SPECIAL COSTS				
	860960	BIM	Building Information Modeling Consultant	SOFT COSTS
	860961	COMMISSIONING	Commissioning	SOFT COSTS
	860962	COST/SCHEDULING	Cost and Schedule Validation	SOFT COSTS
	860963	MOVING	Moving Costs	SOFT COSTS
	860964	PEER REVIEW	Peer Review	SOFT COSTS
	860965	PUBLIC ART	Public Art	HARD COSTS
	860966	SIGNAGE	Interior or Exterior Signage Installation	HARD COSTS
	860967	PERMITS / FEES	City Fees, Permit Fees, Health Dept Fees, Land Disturbance Fees, Easement & Encroachment Fees, Franchise Fees	SOFT COSTS
IN HOUSE SERVICES				
(Roll up to Special Costs)	860970	KEYING	Key Shop	HARD COSTS
	860971	O&M SERVICES	O&M Services	SOFT COSTS
	860972	U&E SERVICES	U&E Services	SOFT COSTS
INFRASTRUCTURE				
(Roll up to Special Costs)	860980	CHILLED WATER SERVICE WORK	Chilled Water Work	HARD COSTS
	860981	ELECTRICAL SERVICE WORK	Electrical Service Connection / Site Work	HARD COSTS
	860982	GAS SERVICE WORK	Gas Service Infrastructure Work	HARD COSTS
	860983	STEAM SERVICE WORK	Steam Infrastructure Work	HARD COSTS
	860984	VOICE DATA NETWORK WORK	Voice, Data, Network, Cable, Telephone, Security Systems and Cameras, Parking Controls, Door Controls	HARD COSTS
	860985	WATER SERVICE WORK	Water Service Infrastructure Work	HARD COSTS
UTILITIES				
(Roll up to Special Costs)	860990	CW USAGE	Chilled Water Usage Cost During Construction	SOFT COSTS
	860991	ELECTRIC USAGE	Electrical Usage Cost During Construction	SOFT COSTS
	860992	GAS USAGE	Gas Service Usage Cost During Construction	SOFT COSTS
	860993	STEAM USAGE	Steam Usage Cost During Construction	SOFT COSTS
	860994	VOICE DATA NETWORK USAGE	Voice, Data, Network Usage Cost During Construction	SOFT COSTS
	860995	WATER USAGE	Water Usage Cost During Construction	SOFT COSTS

This is a detailed key for the cost coding system that has been implemented for all D&C contracts.

- 4) When the Custom Properties form is complete, click the close 'X' in the upper right hand corner of the screen.



- 5) The below pop up will appear. Select 'YES'.



- 6) Your contract is now routing through Web Now for approval and should be visible on the Web Now queue.

Email Contact for Contracting and Invoicing – USE COMMENTS SECTION

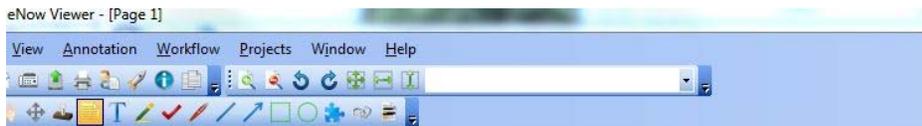
Property	Value
Contract Title	McCamish Roof Intrusion Detection Sy
Project Budget > \$100K? or IDIQ/TO?	No
Manager 1	Brian Clarke
Encumbrance Amount	4,870.00
Component Group	Construction
Component	860900 Construction
Outside Sign Auth?	None
Design or Construction Revw?	Design
PSoft Account 1	9034211
Amount 1	4,870.00
PSoft Account 2 (optional)	
Amount 2 (optional)	
PSoft Account 3 (optional)	

Notes

dan@georgiasecurity.net

Please include the email of the vendor who is to receive the executed contract in this notes section.

Image Now Communication – USE STICKY NOTES ON FRONT PAGE



Please use sticky notes as a rule for all communications with accounting.

TO: Georgia Security System
Sent via e-mail

FROM: Donna Vongsouvan, Facility

RE: McCamish Roof Intrusion
Notice to Proceed
Contract No. 106D-15
AiM No. 322-2014

Sticky Note

Enter Text:
USE STICKY NOTES FOR ALL COMMUNICATION

History:

This is to advise you that we have accepted your proposal on the above referenced project in

CONTRACT APPROVAL INSTRUCTIONS FROM EMAIL:

- 1) You will receive an email notification when contracts are waiting in your queue for approval. Please note that the email notification frequency can be adjusted (e.g. once a day, twice a day, etc.)
- 2) Click the HTTP link that is in the email. The WebNow log in box should appear.

There are 1 contracts in the <http://www.webnow.gatech.edu/?action=workflow&queue=CTR%20Special%20Projects%20-%20Constr> queue that require your review.

- 3) You will need to log into Web Now using your GT use name and password. (Note, this is not your Facilities user name and password.)

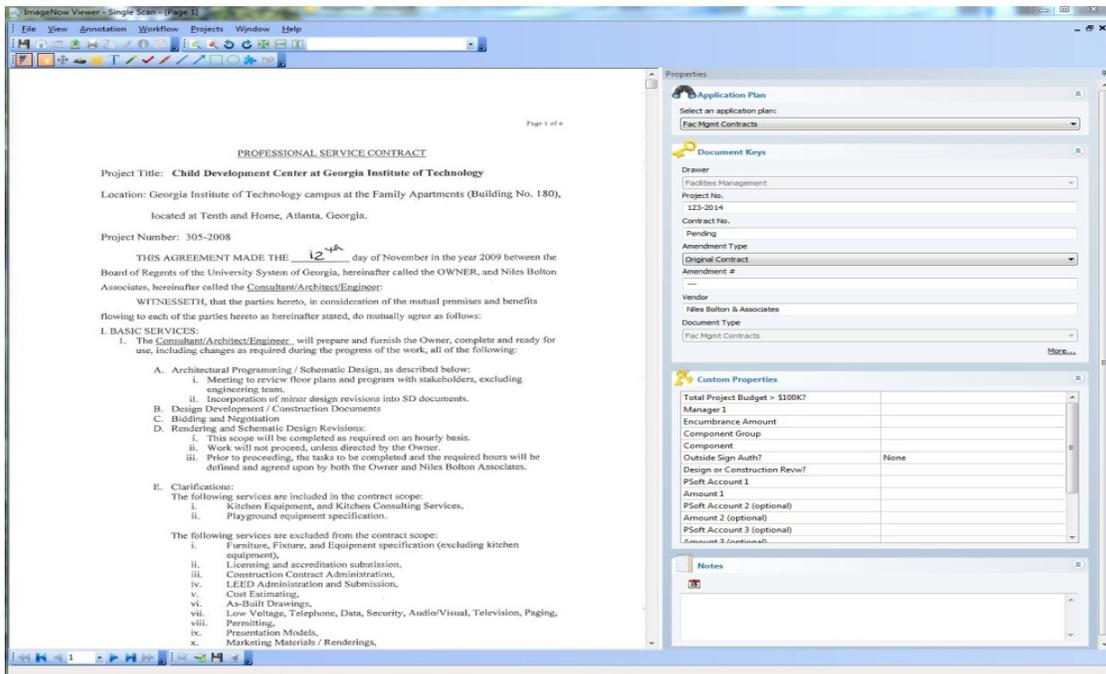


- 4) WebNow will open to your workflow queue showing a grid of the contracts that require your approval. Double click on the grid line of the contract that you want to review.

webnow

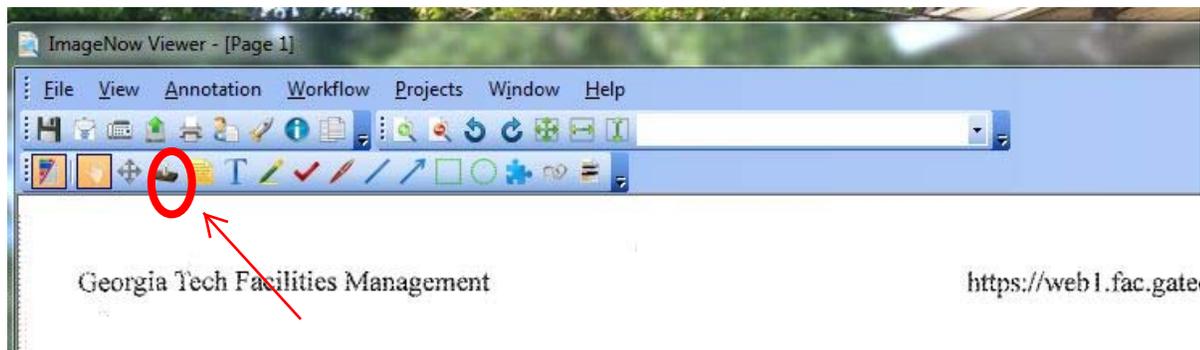
Project No.	Contract No.	Amend Type	Amend #	Vendor	Encumbrance Amount	Manager 1	Outside Sign Auth?	Pages	Created
364-2011	720-14	Change Order	1	Leapley Construction	65,017.00	Jennifer Disotell	None	12	6/13/14 3:18:5...

- 5) The contract will open and look similar to the below with the routing information to the right. Review the contract by scrolling through the pages using the page forward and back arrows in the bottom left corner of the window. OR press F9 to click through thumbnails of each page.



- 6) **STAMPING THE DOCUMENT:** To approve the document, you simply apply your approval stamp to the front page of the contract.

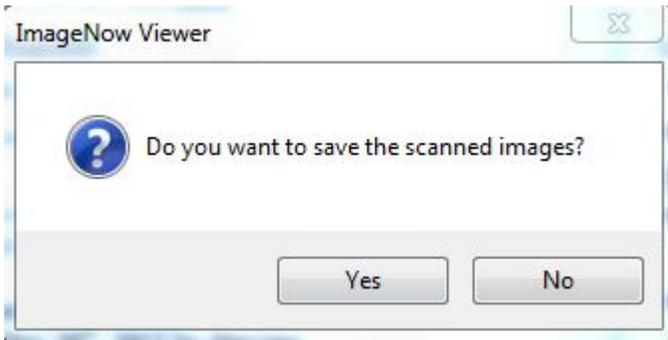
- Right click on the stamp icon in the annotation bar.
- Choose your default stamp by clicking on the appropriate 'FAC _____ OK' stamp (You'll only have to do that the first time!)
- Click on the document to apply the stamp.



- 7) The stamps will look similar to the below once the contract is complete (but with your name instead of Karla's!) Note that you are the only person who can access this stamp – it is tied to your unique log in and password.



- 8) Close the window using the **RED** 'x' in the upper right hand corner to complete the approval and close the contract.
- 9) The below pop up box will appear, and you should select 'YES' to save your approval. Done!



E-mail a document

 Show All

The sections that comprise this procedure include:

- Select a document to e-mail
- Choose an output profile to automatically set e-mail settings
- Manually set e-mail settings

Begin with the "Select a document to e-mail" section and complete the steps as directed.

Select a document to e-mail

1. In **ImageNow Explorer**, select the document or documents to e-mail.
2. On the **File** menu, point to **Send To** and click **E-mail**.
3. In the **E-mail** dialog box, perform one of the following actions:
 - To select an e-mail output profile, perform the steps in the "Choose an output profile to automatically set e-mail settings" section.
 - To enter e-mail settings manually, perform the steps in "Manually set e-mail settings" section.

Choose an output profile to automatically set e-mail settings

To select an output profile for the e-mail, perform the following steps.

1. Under **General**, for **Profile**, select the appropriate output profile for the individual or group to whom you want to e-mail the document. ImageNow automatically populates the remaining fields.
2. To output the documents, click **OK**.

Manually set e-mail settings

You must choose an output method to manually set e-mail settings. If you select Attachment as the output method, you must also set attachment options.

Choose an output method

To choose an output method, under **General**, perform the following steps.

1. Optional. For **E-mail**, type the e-mail address of the individual or group to whom you want to e-mail the document.
Note Leave the **E-mail** box empty to select the e-mail address from the address book of your e-mail client.
2. For **Method**, select one of the following methods to e-mail the document:
 - **Attachment** to attach the document to the e-mail.
 - **ImageNow Link** to place an ImageNow link in the e-mail that can open the document directly within ImageNow.
 - **WebNow URL** to place a WebNow link to within the e-mail that can open the document within WebNow.
3. If you selected **ImageNow Link** or **WebNow URL** as the method for sending the document, in the **Output Profile** dialog box, click **OK** to output the links to your e-mail client.
4. If you selected **Attachment** as the sending method, perform the steps provided in the following "Set attachment options" section.

Set attachment options

If you selected **Attachment** as the output method, you must choose one of the following formats for the attachment:

- **Individual files** to output multiple files within the ImageNow document as individual output files.
- **Multi-page tiff for each document** to output the document as a single, multi-page TIFF file. If you output multiple documents, ImageNow creates a multi-page TIFF output file for each document.
- **Single PDF** to output the document as a single PDF file. If you output multiple documents, ImageNow creates a single PDF output file.

Perform the steps provided in the following section that are applicable to the attachment format you want.

[Output as individual files](#)

[Output as multi-page tiff](#)

[Output as single PDF](#)

If you selected **Attachment** as the output method and you want to output documents as a **Single PDF**, perform the following steps.

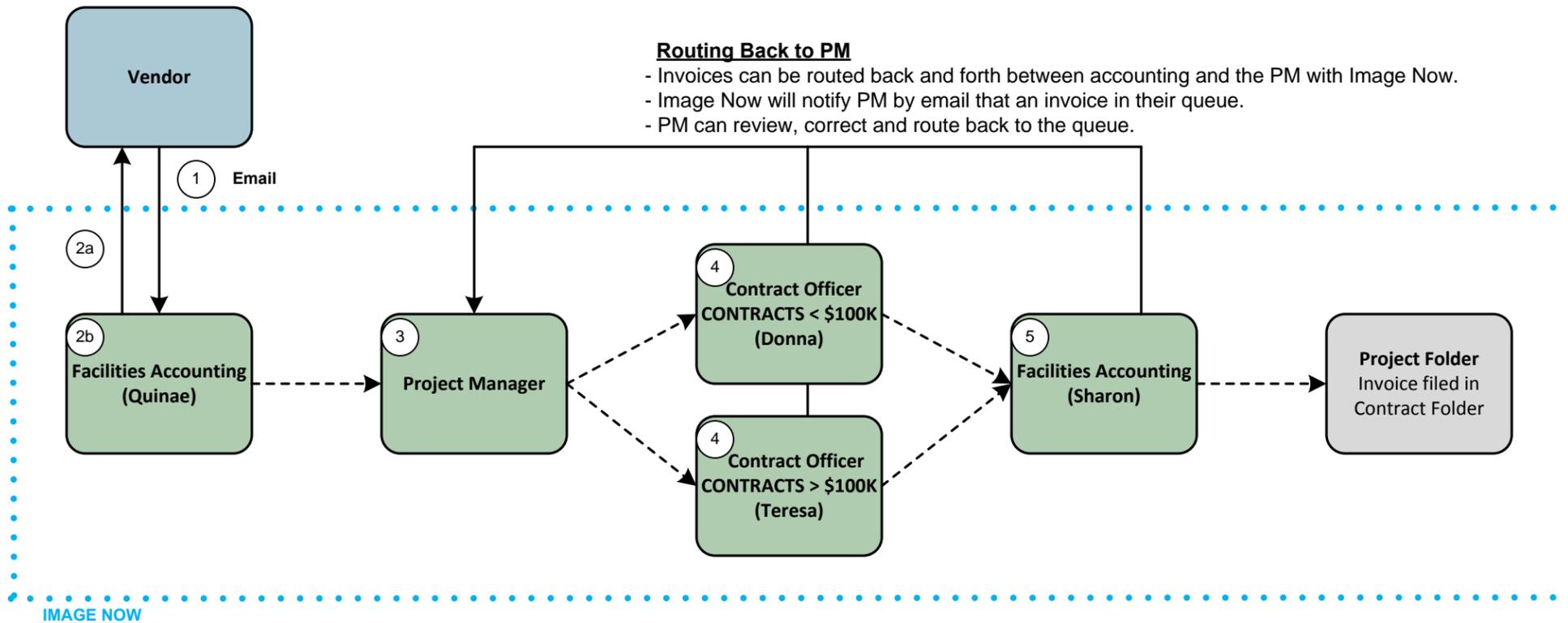
1. For **Format**, select **Single PDF**.
2. Under **Pages**, select which pages of the document to e-mail.
3. Under **Annotations**, for **Include**, select one of the following options:
 - **Annotations** to output the document with annotations.
 - **No annotations** to output the document without annotations.
4. Optional. To change the attachment settings, click **Options** and, in the **E-mail Output Options** dialog box, perform the following substeps:
 1. Under **File Generation**, for **File name**, type a name for the output file.
 2. For **Image color conversion**, perform one of the following actions:
 - **None** to not modify the color of the output file.
 - **Grayscale** to convert the color of the output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
 - **Black and White** to convert the color of output file to black and white. This setting reduces the size of the output file.
 3. Under **Include**, select whether to include sticky note contents.
 4. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number.
 5. Click **OK** to close the **E-mail Output Options** dialog box.
5. Click **OK** and send the e-mail as you normally do.

Note To send e-mail, ImageNow uses the default e-mail program configured on your system.



[Copyright©](#) 2004-2011 Perceptive Software, Inc. All rights reserved.

Facilities Invoice Routing Work Flow – Design and Construction INVOICES



FACILITIES INVOICE ROUTING WORK FLOW

1) Vendor:

Vendor sends an invoice by email to: gtfacinvoice@mail.gatech.edu
Note: If a project manager or accounting receives an invoice, they should direct the vendor to email it to the designated email address in the future and provide the contract number and project number to the vendor. The PM can scan and email, or forward the invoice to this email address as needed.

2a) Facilities Accounting:

- If invoice does not have contract number, or project number, it will be returned to the vendor and deleted from the queue.
- Standard email instructions on new process is included when invoices are returned to the vendor.

2b) Facilities Accounting:

- Match invoice to contract in Image Now.
- Enter the following data in Image Now Invoicing Workflow:
 - Automated:* Vendor Name, Contract #, Project #
 - Manual Entry:* PO #, Peoplesoft Account #, Invoice #, Invoice Amount, Invoice Date
- Stamps invoice for approval when complete.

3) Project Manager:

- Invoice is routed to a queue for each Project Manager.
- The PM is notified by email that there is an invoice in their queue for approval.
- PM reviews invoice for payment approval, reviews all data fields in Image Now, adjusts dollar value for payment as needed, notes if invoice should be applied to more than one Peoplesoft accounts as needed, and stamp invoice for approval.

4) Contract Officer:

- Log invoice into AiM, review invoice in AiM to confirm no duplicates and balance available to pay on contract.
- Final Payments - Hold for close out documents as required on final payments.
- Stamps contract for approval.

Note: Contracts with a D in the contract number are automatically routed to Donna, without a D go to Teresa.

5) Facilities Accounting:

- Reviews invoice against open encumbrance report for duplicate pay and encumbrance funding availability.
- Completes GT Accounts Payable invoice approval form
- Copies document to GT Accounts Payable AP Docs for pay
- Routes copy to GT Accounts Payable Construction Pay queue.

6) Automated:

Image Now routes invoice to project and contract folder.

**WORKFLOW QUEUES
DECODER**

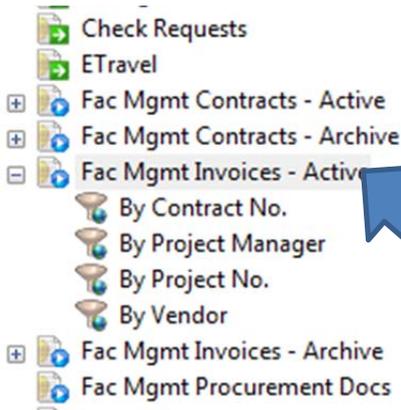
INVOICING

Name of Queue	Person Managing Queue / or Description
INV Approval Start	Sharon Harrah manages invoices coming into the system
INV Return to Approval Start	Sharon Harrah manages invoices coming into the system
Purchase Order Invoices	Brenda Cochran manages purchase order invoices
INV Contracting Officer >100 K Approval	Donna Vongsouvan manages invoices against contracted amount
INV Contracting Officer <100 K Approval	Ericka Thomas manages invoices against contracted amount
INV Accounting Approval	Sharon Harrah prepares invoice to go to AP
INV PM Approval	Project Manager approval of invoice
INV Return to PM	Project Manager needs to respond to an issue on the invoice and route back to correct person in accounting.
INV Approval Complete	Invoices that are complete.

Image Now Communication – INVOICE APPROVAL

PM Approval of Image Now Invoices:

- All invoices will come to you via an invoice queue. You will receive an email advising you that invoices are in your queue. You can click on the link to open the queue OR you can open Image Now and click on the Invoice Active folder.



- All of the invoices will be in a SHARED queue. Click on the grey column header titled Manager 1 and the invoices will be sorted by Manager name.

Time In Queue	Sta...	Co...	Inv...	PO Number	Vendor Name	Invoice Amo...	Invoice Date	Manager 1	Final Invoice?	PO Pay?	Pages	Creat
1 hours 18 min...	Idle	0...	073...	2012...	9010123917	MAY ARCHITE...	3,250.00	11/06/2014	Kim Wilson		2	11/13/
1 hours 51 min...	Idle	0...	048...	8498	9010165322	PENTA ENGINE...	7,195.00	11/13/2014	David Marder		2	11/14/
3 days 1 hours ...	Idle	L...	005...	107463	9010199304	SPRINKALAWN...	25,810.00	11/06/2014	Jerry Young		2	11/10/
1 hours 15 min...	Idle	0...	074...	2013...	9010208668	May Architectur...	11,425.00	11/06/2014	Kim Wilson		2	11/13/
3 days 55 minu...	Idle	L...	028...	7202...	9010216726	NORTH GEORG...	1,750.00	11/07/2014	Jerry Young		2	11/10/
2 hours 12 min...	Idle	C...	036...	3121	9020157158	The Epsten Gro...	1,700.00	10/31/2014	Gary Petherick		3	11/11/
1 hours 5 minut...	Idle	0...	064...	2013...	9020173568	MAY ARCHITE...	1,687.50	11/06/2014	Kim Wilson		2	11/13/
2 days 19 hour...	Idle	0...	PO	738281	9020189092	Falcon-Commer...	623.09	10/22/2014	Poly Patton	Yes	3	11/11/
36 minutes 57 ...	Idle	0...	PO	214-1...	9020189112	IMA Corporate ...	2,307.74	10/10/2014	Poly Patton	Yes	5	11/13/
2 days 19 hour...	Idle	0...	PO	0013...	9020191581	Teknion	139,758.70	10/10/2014	Poly Patton	Yes	4	11/11/
2 days 19 hour...	Idle	0...	PO	1283...	9020196492	OFS Brands	3,832.63	10/13/2014	Poly Patton	Yes	2	11/11/
3 days 1 hours ...	Idle	C...	PO	3000...	9020197375	Haworth Inc	50,112.15	11/10/2014	Poly Patton	Yes	20	11/11/
2 days 19 hour...	Idle	0...	PO	0013...	9020202039	Teknion	1,150.23	10/15/2014	Poly Patton	Yes	3	11/11/
2 days 20 hour...	Idle	0...	PO	0054...	9020203975	Global Industrie...	2,700.48	10/23/2014	Poly Patton	Yes	2	11/11/
2 days 19 hour...	Idle	0...	PO	89525	9020206771	CWC	8,607.28	10/17/2014	Poly Patton	Yes	6	11/11/
2 days 1 hours ...	Idle	0...	017...	2780	902020869	Donnelly Electric...	2,880.00	11/10/2014	Poly Patton		3	11/11/
3 days 1 hours ...	Idle	0...	PO	9099...	9020211514	Exemplis	1,454.32	11/10/2014	Poly Patton	Yes	3	11/11/

- Double click on the first invoice in your queue to open the invoice for review and approval.

webnow

options | help | disconnect

INV PM Approval

Time In Queue	Sta...	Co...	Inv...	PO Number	Vendor Name	Invoice Amo...	Invoice Date	Manager	Final Invoice?	PO Pay?	Pages	Cre
1 hours 51 min...	Idle	0... 048...	8498	9010165322	PENTA ENGINE...	7,195.00	11/13/2014	Dan...			2	11/1
2 hours 12 min...	Idle	C... 036...	3121	9020157158	The Epsten Gro...	1,700.00	10/31/2014	Ge...			3	11/1
3 days 1 hours ...	Idle	L... 005...	107463	9010199304	SPRINKALAWN...	25,810.00	11/06/2014	S...			2	11/1
3 days 55 minu...	Idle	L... 028...	7202...	9010216726	NORTH GEORG...	1,750.00	11/07/2014	Jer...			2	11/1
1 hours 18 min...	Idle	0... 073...	2012...	9010123917	MAY ARCHITE...	3,250.00	11/06/2014	Kim Wilson			2	11/1
1 hours 15 min...	Idle	0... 074...	2013...	9010208668	May Architectur...	11,425.00	11/06/2014	Kim Wilson			2	11/1
1 hours 5 minut...	Idle	0... 064...	2013...	9020173568	MAY ARCHITE...	1,687.50	11/06/2014	Kim Wilson			2	11/1
3 days 1 hours ...	Idle	C... PO	3000...	9020197375	Haworth Inc.	50,112.15	11/10/2014	Poly Patton	Yes		20	11/1
3 days 1 hours ...	Idle	0... PO	9099...	9020211514	Exemplis	1,454.32	11/10/2014	Poly Patton	Yes		3	11/1
2 days 20 hour...	Idle	0... PO	0054...	9020203975	Global Industrie...	2,700.48	10/23/2014	Poly Patton	Yes		2	11/1
2 days 19 hour...	Idle	0... PO	89525	9020206771	CWC	8,607.28	10/17/2014	Poly Patton	Yes		6	11/1
2 days 19 hour...	Idle	0... PO	0013...	9020202039	Teknion	1,150.23	10/15/2014	Poly Patton	Yes		3	11/1
2 days 19 hour...	Idle	0... PO	0013...	9020191581	Teknion	139,758.70	10/10/2014	Poly Patton	Yes		4	11/1
2 days 19 hour...	Idle	0... PO	1283...	9020196492	OFS Brands	3,832.63	10/13/2014	Poly Patton	Yes		2	11/1
2 days 19 hour...	Idle	0... PO	738281	9020189092	Falcon-Commer...	623.09	10/22/2014	Poly Patton	Yes		3	11/1
2 days 1 hours ...	Idle	0... PO	017...	2780	902020869	Donnelly Electric...	2,880.00	11/10/2014	Poly Patton		3	11/1
36 minutes 57 ...	Idle	0... PO	214-1...	9020189112	IMA Corporate ...	2,307.74	10/10/2014	Poly Patton	Yes		5	11/1

- Note: **Hit F7** if the Document Keys and Custom Properties window is not visible.

Properties

Drawer
Facilities Management

Project No.
0004-2013

Contract No.
0732-13

Invoice No.
201221006

PO Number
9010123917

Vendor Name
MAY ARCHITECTURE + INTERIORS LLC

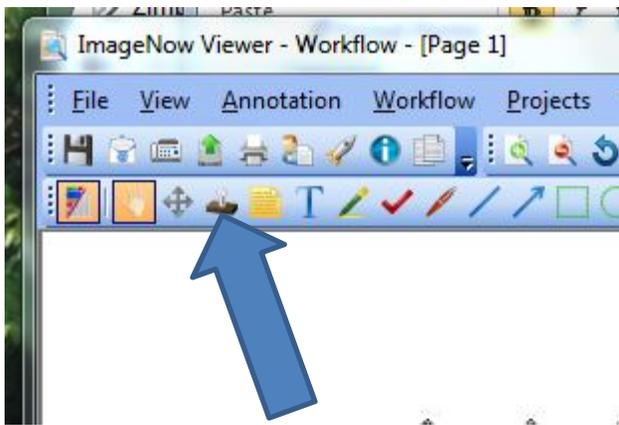
Document Type
Fac Mgmt Invoices

More...

Custom Properties

Manager 1	Kim Wilson
Invoice Date	11/06/2014
Invoice Amount	3,250.00
PSoft Account 1	54012511

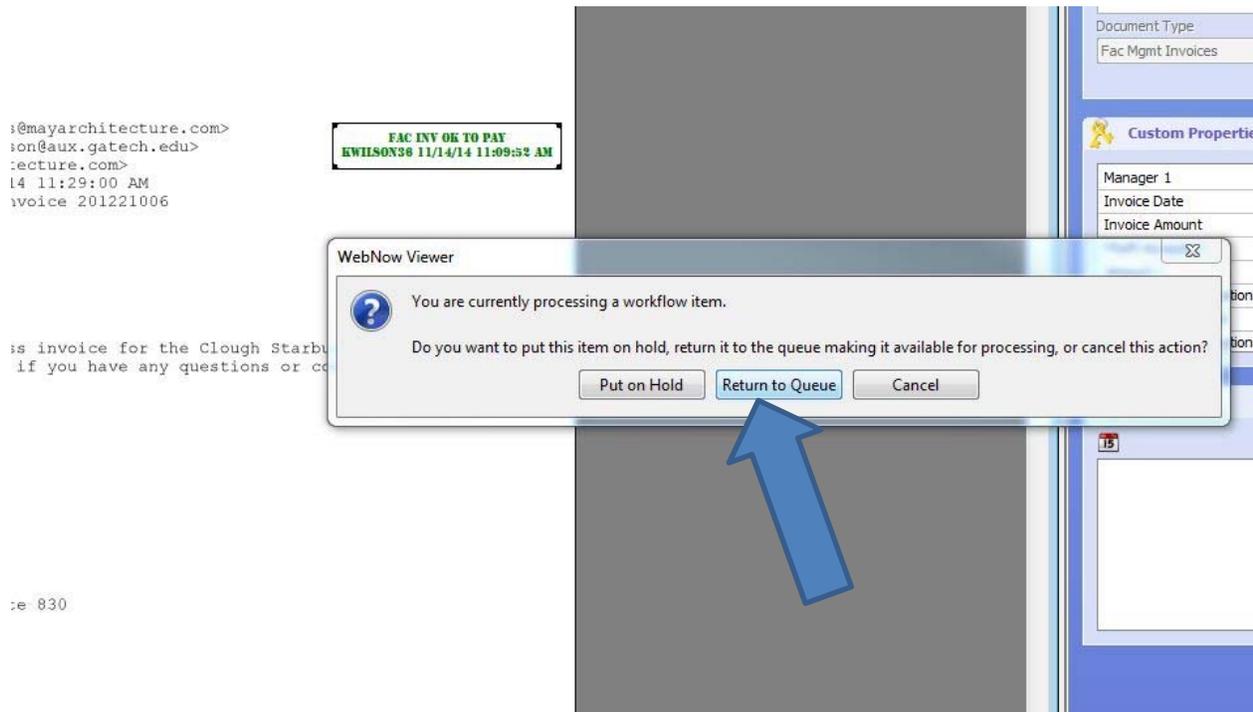
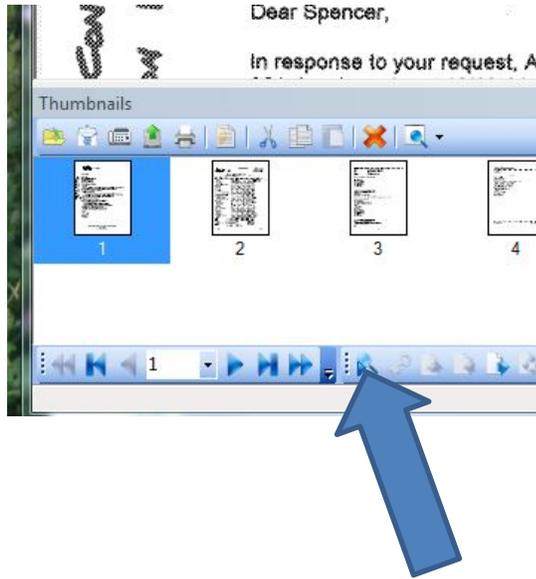
- To approve an invoice, select the FAC INV OK to Pay stamp by right clicking on the stamp button. You should only have to select the stamp the very first time you approve an invoice. Click on the front page of the document to stamp your approval.
- PM responsibilities:
 - Review invoice for payment approval,
 - Review all data fields in Image Now that have been completed by accounting,
 - Adjust dollar value as required for cut payment.
(Please use a sticky note to explain why you are cutting invoice payment.)
 - Add peoplesoft account numbers and amounts if the invoice must be split.
(This should be an exception. Normally you can leave as-is.)
 - Use stamp to stamp your approval of invoice.



.ties.gatech.edu
.lities.gatech.edu]
?2 AM

FAC INV OK TO PAY
GP5 11/11/2014 8:56:38 AM

- Note: You can move from invoice to invoice in your queue, using the arrow. (Be sure that you don't move into other PMs invoices.) If you chose to use this button a menu will pop up asking if you want to Return to Queue. Selecting Return to Queue, will save your changes and move you to the next invoice.



- When you are done approving invoices, click the RED 'X' at the upper left corner. This will save your changes and close the invoice.

RETURN TO PM:

- There is a queue of invoices that need input beyond a simple approval. These invoices are in the INV Return to PM queue. (The workflow queue column indicates if the invoice is in the INV PM Approval queue or the INV Return to PM queue.)
- You'll need to read the sticky note (yellow note in center of first page) and respond to accounting with an action. Please respond ON THE STICKY NOTE.
- When you are complete, you need to forward the invoice back to the accounting staff person who sent you the invoice.

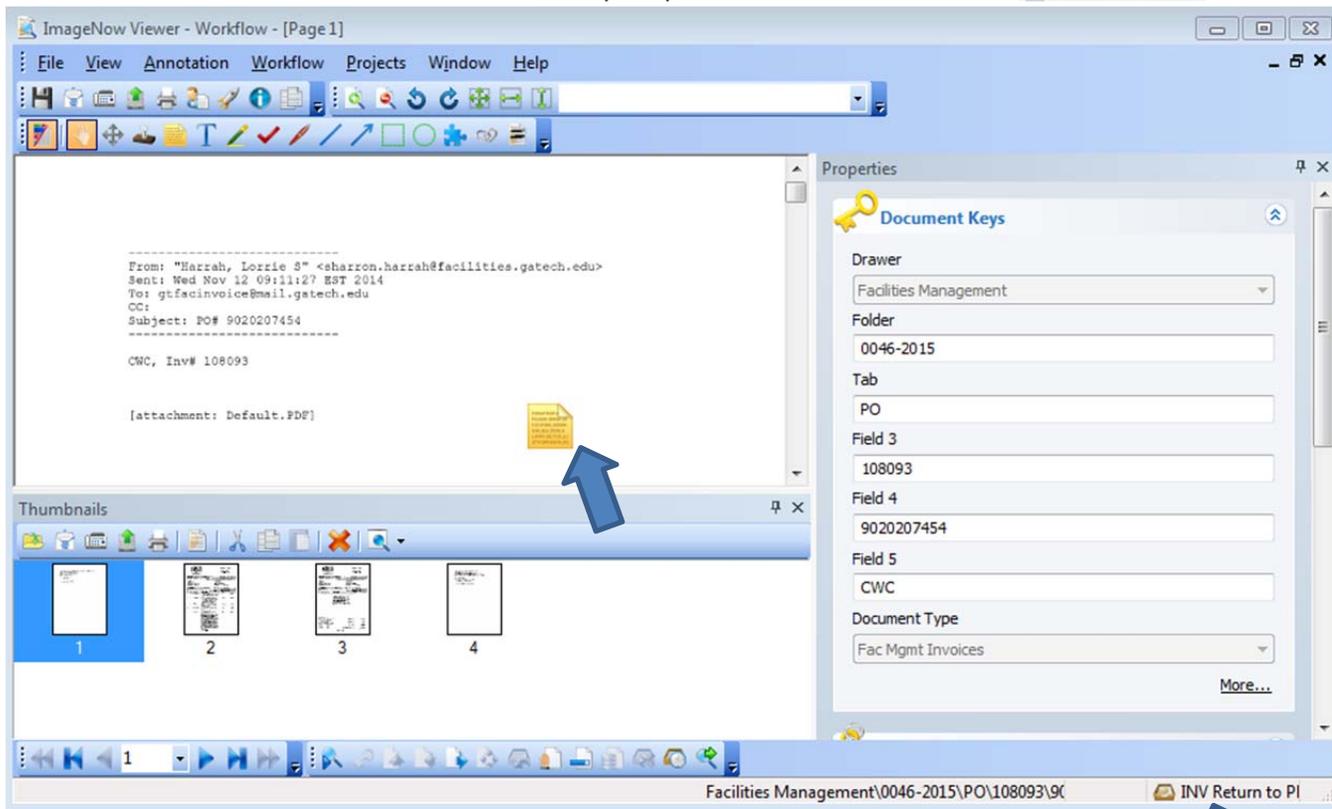
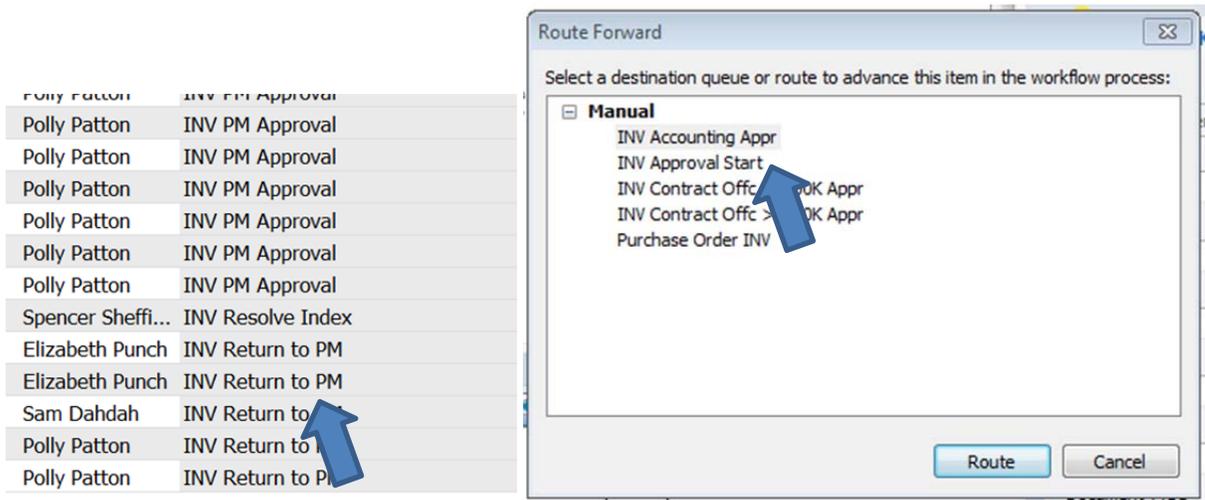


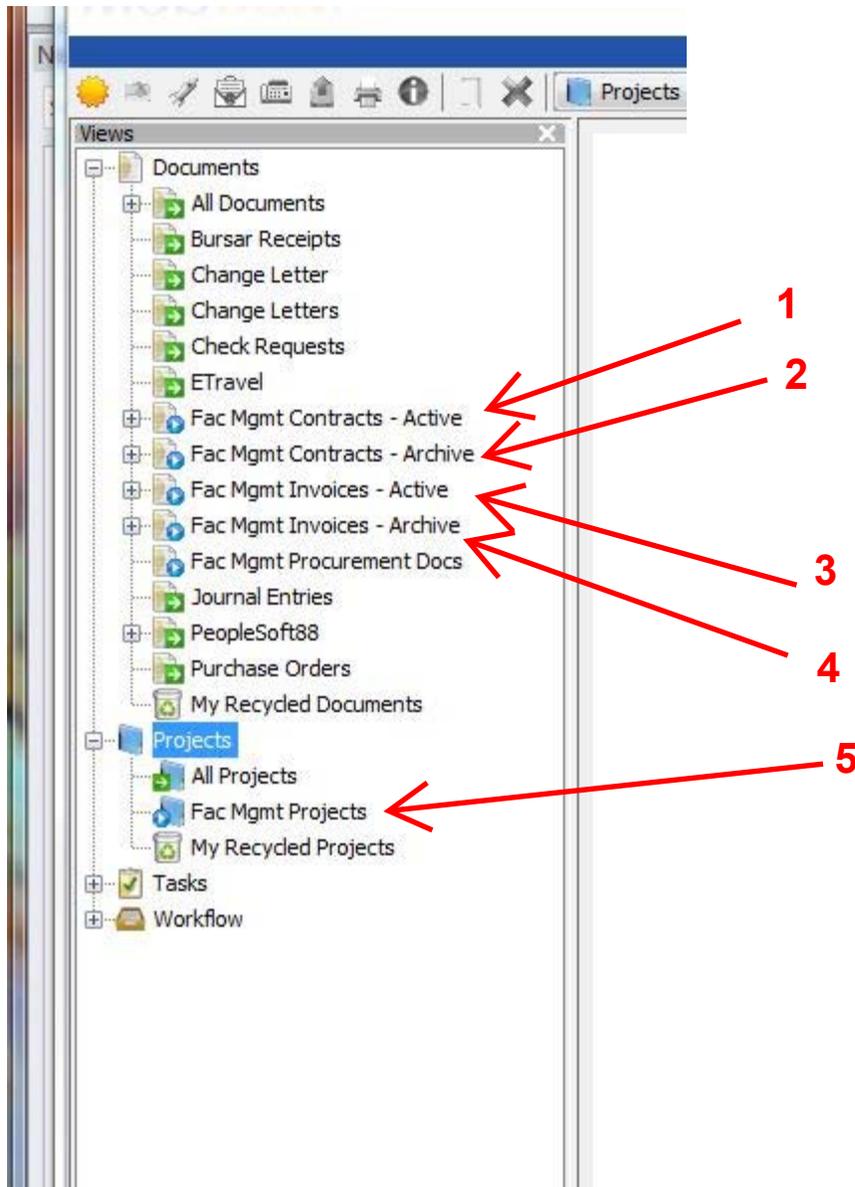
Image Now Communication – INVOICE APPROVAL TRANSITION

PM Accounting Transition Assistance:

- Vendors are going to be notified to send all invoices to gtfacinvoice@mail.gatech.edu and to provide the contract and project number on all invoices. These instructions have been added to all Notice to Proceed documents.
- Accounting will be matching up all invoices with the contracts already in Image Now. We have approximately 500 contracts (from prior to FY15) that are not in Image Now.
- There will be a transition period where older contracts are sun-setting, and vendor's are beginning to receive the revised NTPs, where PMs will need to assist accounting in the following ways:
 - If you receive hard copy invoices (via mail), please scan and forward them to the invoice email address.
 - If you receive emailed invoices, please forward them to the invoice email address. Please also send a quick email to the vendor advising them of the new invoice email address, and providing them with the project and contract numbers for that invoice, so that they can properly submit the next invoice.
 - Please do not submit hard copy invoices to accounting after the launch date.
 - If you are forwarding an invoice to the invoice email address, please help accounting code the invoices and include the contract number and project number in the email on all invoices if the vendor has omitted this information.



NAVIGATING TO FIND PROJECTS, CONTRACTS, INVOICES



CONTRACTS

- 1) **Fac Mgmt Contracts Active** – These are contracts that are in the workflow for approval. They remain in the Active folder for 7 days after they are issued and then automatically move to Archive.
- 2) **Fac Mgmt Contracts Archive** – This is a searchable permanent archive of all D&C contracts.

INVOICES

- 3) **Fac Mgmt Invoices Active** - These are invoices that are in the workflow for approval. They remain in the Active folder for 7 days after they are issued and then automatically move to Archive.
- 4) **Fac Mgmt Invoices Archive** – This is a searchable permanent archive of all D&C contract invoices.

PROJECTS

- 5) **Fac Mgmt Projects**- All of the invoices and contracts within an AiM project number roll up into this folder

View of Invoice Folder

double click to open document

Workflow St...	Invoice No.	Manager	Project No.	Workflow Queue	Contra
Completed	14-43-1rev	Brian Clarke	0065-2015	INV Approval Complete	0230-15
Completed	14-44-1	Brian Clarke	0066-2015	INV Approval Complete	0228-15
Completed	14-42-1	Brian Clarke	0061-2015	INV Approval Complete	0229-15
Completed	14-38-1	Brian Clarke	0069-2015	INV Approval Complete	0216-15
Completed	14-37-1	Brian Clarke	0068-2015	INV Approval Complete	0215-15
Completed	6678	Brian Clarke	0067-2015	INV Approval Complete	0271D-1
Idle	37321	David Bowman	0052-2015	INV Accounting Appr	0197-15
Idle	12925-B	David Bowman	C0017-2015	INV Accounting Appr	0328-15
Idle	12925-A	David Bowman	0256-2012	INV Accounting Appr	0329-15
Idle	14100-2	David Chandler	0258-2013	INV Accounting Appr	0041-15
Idle	1410878	Don Alexander	C0062-2014	INV Accounting Appr	0171D-1
Idle	0837-14-3	Elizabeth Punch	0177-2013	INV PM Approval	0837-14
Idle	1057-14-5	Elizabeth Punch	0326-2014	INV PM Approval	1057-14
Idle	197-1	Elizabeth Punch	0088-2015	INV PM Approval	0249D-1
Idle	0955-14-2	Elizabeth Punch	0020-2013	INV PM Approval	0955-14
Idle	0995-14-1	Elizabeth Punch	0020-2013	INV PM Approval	0955-14
Completed	194-2	Elizabeth Punch	0177-2014	INV Approval Complete	0202-15
Completed	199-1	Elizabeth Punch	0177-2014	INV Approval Complete	0318-15
Completed	114088-1	Elizabeth Punch	0093-2015	INV Approval Complete	0309-15
Completed	25968	Elizabeth Punch	C0246-2013	INV Approval Complete	0691-14
Idle	IATL65824	Elizabeth Punch	0221-2013	Purchase Order INV	0276-15
Completed	GATECH.Comp...	Elizabeth Punch	0093-2015	INV Approval Complete	0269-15
Completed	191-2	Elizabeth Punch	0191-2014	INV Approval Complete	0168-15

APPLICATION FOR PAYMENT

APPLICATION FOR PAYMENT NO. _____ PROJECT NO. 1057-14 Contract No. 1057-14-5 Floor Revol

CERTIFICATE OF THE CONTRACTOR OR HIS DULY AUTHORIZED REPRESENTATIVE

To the best of my knowledge and belief, I certify that all items, units, quantities, and areas of work and material shown on this Application for Payment No. _____ are correct; that all work has been performed and materials supplied in full accordance with the terms and conditions of the Contract Documents between _____ (Owner) and _____ (Contractor) dated _____ and all authorized changes thereto; and that the following is a true and correct statement of the contract account up to and including the last day of the period covered by this Application and that no part of the amount due this Applicant has been received:

(a) Total amount earned for work in place (original contract)	\$ 186,706.45
(b) Total amount earned for work in place (Change Orders)	\$ 0.00
(c) Value of materials stored at site	\$ 0.00
(d) Total amount earned (a) plus (b) plus (c)	\$ 186,706.45
(e) Amount retained (0%)	\$ 0.00
(f) Total amount less retained percentage (10) minus (d)	\$ 186,706.45
(g) Total previously approved	\$ 103,802.95
(h) Amount due THIS ESTIMATE (f) minus (g)	\$ 21,103.50
(i) Retainage payment to Subcontractors per Paragraph 1.12.2 of the Contract Documents	\$ 6,673.25
(j) AMOUNT DUE Contractor (h) minus (i)	\$ 15,430.25

I further certify that all claims outstanding against the undersigned Contractor for labor, materials, and expendable equipment employed in the performance of said contract have been paid in full in accordance with the requirements of said contract, except such outstanding claims as are listed below or on the attached sheet, which statement contains all claims against the Contractor which are not yet paid, including all disputed claims and any claims to which the Contractor has or will assert any defense.

I further certify that all of the materials indicated on this Application for Payment as being stored on the Site, but not yet incorporated into the building, have been purchased, delivered, and are now stored on the Site for future incorporation into the building. Contractor assumes full responsibility for the existence, protection, and, if necessary, replacement of the aforementioned materials until the completion of this contract.

Contractor: Synergy Development Partners, LLC By: Elizabeth Punch
 Date: 11/26/2014 Title: Principal

STATEMENT OF THE CONTRACT COMPLIANCE SPECIALIST

I have checked this Application for Payment and, to the best of my knowledge and belief, the statement of work performed and statement of materials stored on site by the Contractor are supported by my observations.

Name: _____ Contract Compliance Specialist Date: _____

CERTIFICATE OF THE DESIGN PROFESSIONAL

I certify that I have verified this Application for Payment and, to the best of my knowledge and belief, it is a true and correct statement of work performed and statement of materials stored on site by the Contractor and that the Contractor's certified statement of the amount and the amount due is correct and just. I further certify that all work has been performed and materials have been supplied in full accordance with the terms and conditions of the Contract Documents and authorized changes thereto.

Name: _____ Design Professional Date: _____

Document Keys

Drawer: Facilities Management

Project No.: 0326-2014

Contract No.: 1057-14

Invoice No.: 1057-14-5

PO Number: 9020192995

Vendor Name: SYNERGY DEVELOPMENT PARTNERS

Document Type: Fac Mgmt Invoices

Custom Properties

Manager 1	Elizabeth Punch
Invoice Date	11/26/2014
Invoice Amount	15,430.55
PSoft Account 1	903194120
Amount 1	15,430.55
PSoft Account 2 (optional)	
Amount 2 (optional)	
PSoft Account 3 (optional)	

Facilities Management | 0326-2014 | 1057-14 | 1057-14-5 | 9020192995 | SYNERGY DEVELOPMENT PARTNERS | Fac Mgmt Invoices | INV PM Approval | Page 2 of 15 | 223,295 K

Click on any line item and the document will open.
 Hit F7 if the document keys and properties are not visible.

View of Contract Folder - Active

Workflow...	Project No.	Contra...	Vendor	Manager 1	Workflow Queue	Amend Type	Amend #
Idle	00240-2015	Pending	Georgia Secur...	Elizabeth Punch	CTR Construction Appr	Original Contract	---
Idle	0093-2015	0269-15	J&A Engineering...	Elizabeth Punch	CTR Financial Dir Appr	Original Contract	001
On Hold	0113-2015	0354D-15	AVS Builders, Inc.	Elizabeth Punch	CTR Contract Offc <\$100...	Original Contract	---
Completed	0177-2014	0202-15	AVS Builders	Elizabeth Punch	CTR Approval Complete	Change Order	002
Completed	0035-2015	0130D-15	Dycem Ltd	Elizabeth Punch	CTR Approval Complete	Change Order	001
Idle	0104-2015	0351D-15	AVS Builders, Inc.	Elizabeth Punch	CTR Financial Dir Appr	Original Contract	---
Completed	CEST-11-2015	0325-15	E. Escher, Inc.	Elizabeth Punch	CTR Approval Complete	Original Contract	---
On Hold	0104-2015	0348D-15	Professional En...	Elizabeth Punch	CTR Contract Offc <\$100...	Original Contract	---
Completed	0088-2015	0249D-15	AVS Builders, Inc.	Elizabeth Punch	CTR Approval Complete	Change Order	002
On Hold	0320-2014	0035D-15	Wiss, Janney, ...	Elizabeth Punch	CTR Contract Offc <\$100...	Change Order	001
On Hold	0021-2015	0347D-15	Henry Inc	Elvia Lam	CTR Contract Offc <\$100...	Original Contract	---
Idle	0054-2015	0332-15	Hughes Litto...	Elvia Lam	CTR Return to PM	Original Contract	---
Idle	0195-2014	Pending	AVS Builders Inc	Fenella Bryant	CTR Special Projects - Constr	Original Contract	---
Idle	0319-2014	Pending	Cork-Howard C...	Fenella Bryant	CTR Financial Dir Appr	Original Contract	---
Idle	0277-2012	Pending	The ComTran ...	Fenella Bryant	CTR Financial Dir Appr	Original Contract	---
Idle	0312-2014	Pending	Premise Techn...	Fenella Bryant	CTR Financial Dir Appr	Original Contract	---
Idle	C017-2015	Pending	Sheridan Constr...	Fenella Bryant	CTR VP Fac Appr	Original Contract	---
Completed	0312-2014	0322-15	New South Con...	Fenella Bryant	CTR Approval Complete	Original Contract	---
Completed	0274-2014	0317-15	ComTran Grou...	Fenella Bryant	CTR Approval Complete	Original Contract	---
Completed	0277-2012	0312-15	Professional En...	Fenella Bryant	CTR Approval Complete	Original Contract	---
Idle	0274-2014	Pending	AVS Builders Inc	Fenella Bryant	CTR Construction Appr	Original Contract	---
Completed	0319-2014	0346D-15	Communication...	Fenella Bryant	CTR Approval Complete	Original Contract	---
On Hold	0220-2014	0151D-15	AVS Builders, Inc	Fenella Bryant	CTR Contract Offc <\$100...	Change Order	001
On Hold	0220-2014	0272D-15	Premise Techn...	Fenella Bryant	CTR Contract Offc <\$100...	Original Contract	---
Completed	0277-2012	0285-14	Dunlop NDT, LLC	Fenella Bryant	CTR Approval Complete	Original Contract	---
Completed	0149-2014	0356-15	Synergy DP, LLC	Frank Lamia	CTR Approval Complete	Original Contract	---
On Hold	0114-2015	0349D-15	Wiss, Janney, ...	Frank Lamia	CTR Contract Offc <\$100...	Original Contract	---
Completed	0020-2015	0323-15	RPM AV Service...	Frank Lamia	CTR Approval Complete	Original Contract	---
Completed	0020-2015	0320-15	New South Con...	Frank Lamia	CTR Approval Complete	Original Contract	---
Completed	0312-2014	0319-15	Albion Scaccia	Frank Lamia	CTR Approval Complete	Original Contract	---
On Hold	0256-2014	0255-15	CvSBS	Gary Jahn	CTR Contract Offc >\$100...	Original Contract	---

Georgia Institute of Technology
 Facilities Management
 Georgia Institute of Technology
 400 Foster Street NW
 Atlanta, Georgia 30332
 Tel: 404 894 7405

November 24, 2014

TO: Shelly Hughes / Hughes Litton Godwin
 FROM: Teresa M. Corso, Facilities Contracting Officer
 RE: IDIQ: College of Computing, Room 103
 Project No. 0954-2015 / Contract No. 0330-15

Enclosed please find executed Exhibit A on the above referenced award on your IDIQ contract no. 090-15-1. This will serve as your Notice to Proceed for the above referenced project.

Ensure all invoices reference the above noted Project / Contract Number and be EMAILED directly to gf@facinvoice@mail.gatech.edu to avoid payment delay.

Thank you in advance.

Cc: eContract File

Document Keys

Drawer: Facilities Management
 Project No.: 054-2015
 Contract No.: 0330-15
 Amend Type: Original Contract
 Amend #: ---
 Vendor: Hughes | Litton | Godwin
 Document Type: Fac Mgmt Contracts

Custom Properties

Contract Title	College of Computing, Room 103
Project Budget > \$100K? or IDIQ/TO?	Yes
Manager 1	Elvia Lam
Encumbrance Amount	3,125.00
Component Group	Arch & Eng Services
Component	860921 Lead Design
Outside Sign Auth?	None
Design or Construction Revw?	Design

Facilities Management \ 054-2015 \ 0330-15 \ Original Contract \ --- \ Hughes | Litton | Godwin \ Fac Mgmt Contracts | Page 1 of 5 | 217,249 K

View of Project Folder

The screenshot displays the 'webnow' application interface. The left-hand navigation pane shows a tree structure under 'Documents' and 'Projects'. The 'Fac Mgmt Projects' folder is selected. The main content area shows a search bar and a table of project records. A 'WebNow Viewer' window is open, displaying a detailed table of documents for the selected project.

Name	Project Name	Manager 1	Manager 2	Alternate Project...	Building No.
C0203-2014		Jerry Young			
C0361-2010		Jerry Young			
LAND-2015		Jerry Young			
0210-2014	MONTGOMERY KNIGHT LAB 405 -07 ROBOTICS LAB FOR DR. ...	John Duconge			101
C0002-2015		John Duconge			
C0232-2013		John Duconge			
C0396-2012		John Duconge			
0007-2013	CAMPUS HOUSING - KITCHEN	Kim Wilson			GC
0036-2015	STUDENT CENTER COMMONS EXTERIOR COLD STORAGE	Kim Wilson			114

Document Type	Project No.	Contract No.	Field 3	Field 4	Vendor Name	Manager 1
Fac Mgmt Contracts	0007-2013	0358-15	Original Contract	---	Professional Environmental Manag...	Spencer Sheffield
Fac Mgmt Contracts	0007-2013	0442-13	Component Change ...	006	Ajax Building Corporation	Kim Wilson
Fac Mgmt Contracts	0007-2013	0442-13	Component Change ...	007	Ajax Building Corporation	Kim Wilson
Fac Mgmt Invoices	0007-2013	0442-13	0442-13-14	9020209981	AJAX BUILDING CORPORATION ...	Kim Wilson
Fac Mgmt Contracts	0007-2013	0741D-13	Amendment	002	May Architecture Inc.	Kim Wilson
Fac Mgmt Invoices	0007-2013	0741D-13	201306008	9010208668	May Architecture Inc.	Kim Wilson
Fac Mgmt Invoices	0007-2013	0741D-13	201306005	9010208668	May Architecture Inc.	Kim Wilson

The project folder view includes all contracts, and invoices for any project, and is organized by AiM project number.

Facilities Contract Search and Filter

Search for Contracts

1. Click on Documents **View**.
2. Click on 'Fac Mgmt Contracts'.
3. The grid will show up to 500 contract images.
 - Column headings sort (ascending, descending)
 - **Public filters** "narrow down" your search results.
 - **Private filters** can be created and saved.
4. Use 'Search' or 'Quick Search' tabs to create additional queries and filters

The screenshot displays two overlapping windows from a software application. The top window, titled 'Fac Mgmt Contracts', shows a search interface with a 'Quick Search' tab and a search box. Below the search box, a table lists contract details:

Project No.	Contract No.
172-2011	293-13
230-2011	062-12
172-2011	453-13

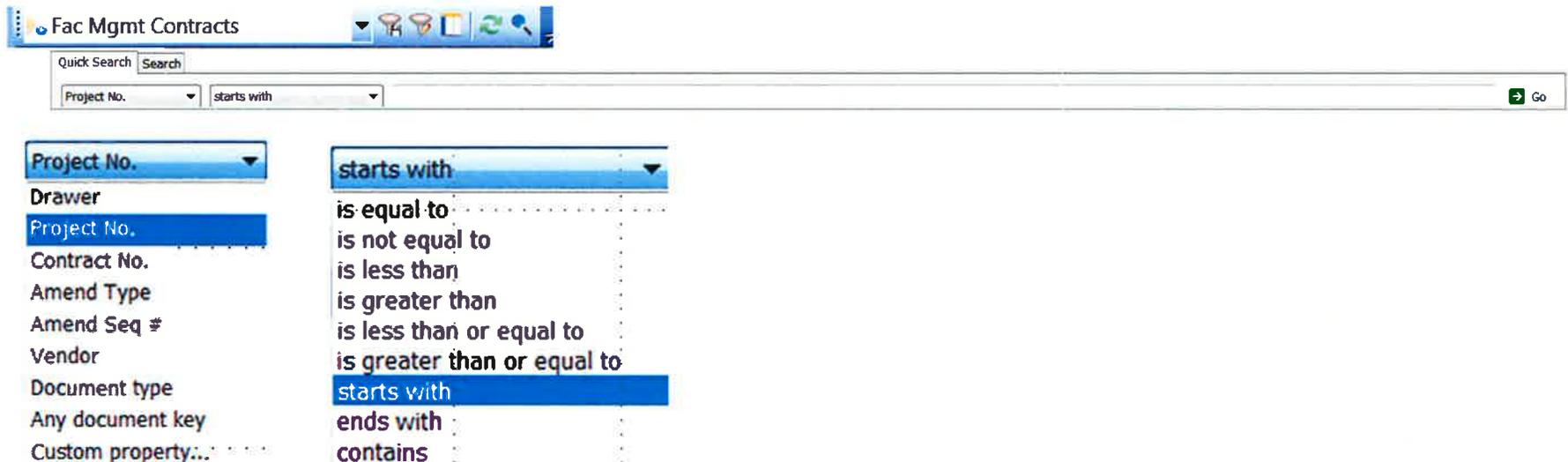
The bottom window, titled 'Fac Mgmt Contracts - Acctg', shows a similar search interface but with a more detailed table of results:

Project No.	Contract No.	Amend Type	Amend #	Vendor
172-2011	293-13T	Original Contract	--	Colin Gordon
230-2011	062-12T	Original Contract	--	VMDO Archite
172-2011	453-13T	Original Contract	--	Smith Carter
172-2011	453-13T	Amendment	1	Smith Carter
172-2011	488-13T	Component Ch...	1	Gilbane Buildi
172-2011	488-13T	Component Ch...	2	Gilbane Buildi

Filter/Search Tools

Quick Filter

- For single condition
- Single key + single operation.



To create a Quick filter:

1. Open the view or queue you want to search on.
2. Create a condition statement using the field + operator + value fields.
3. Click  Go button to view results/test.
4. Click  to name and save your filter.

Filter/Search Tools

Advanced (not really...) filter

- For multiple conditions
- To use prompted fields

1. Click on the 'Search' tab.



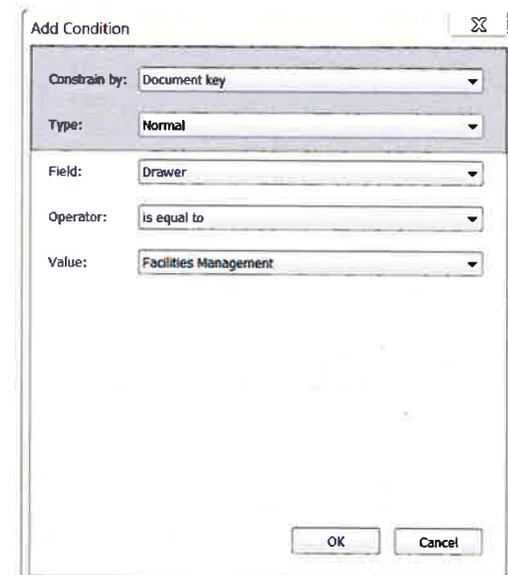
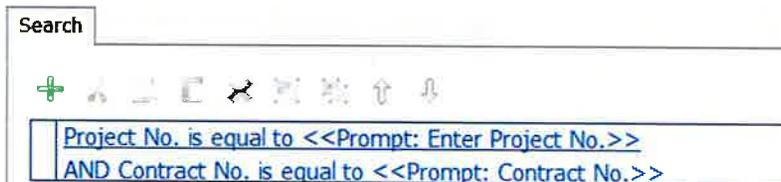
2. Click on the + .

3. Configure your first condition by selecting from the drop downs, etc.

4. Click OK.

5. Click on the + again to add other conditions.

6. Click the AND/OR to change the conjunction.



7. Click  Go to view results.

8. Click  to name and save the filter.

ImageNow Filter Keys and Fields

Document Keys

Makes up the 'filing' structure for your document.

3 are required to make Your document unique.

Default key value = *

Document Keys	Facilities –Specific Keys
Drawer	Facilities Management *
Folder	Project No.
Tab	Contract No.
Field 3	Amendment Type
Field 4	Amendment #
Field 5	Vendor Name
Document Type	Fac Mgmt Contract *

Custom Fields

Other information About your document That you may want To search on.

Facilities-Specific Custom Fields:	PSoft Account 1	Amount 3	Fac VP Appr
Manager 1	Amount 1	Construction Appr	Contract Offc Appr
Encumbrance Amount	PSoft Account 2	Design Appr	Accounting Appr
Component Group	Amount 2	D&C Appr	Contract PO
Component	PSoft Account 3	Financial Appr	Contract Req

Facilities Contract Routing FAQs

1. Once I capture and save a contract, how can I tell if it has routed into the approval process?

All the custom properties from the “Project Budget<\$100K? or IDIQ or TO” line item through the “Amount 1” line item are required to auto-route your contract into the approval routing.

Custom Properties	
Project Budget<\$100K? or IDIQ or TO	Yes
Manager 1	Jennifer Disotell
Encumbrance Amount	65,017.00
Component Group	Construction
Component	860900 Construction
Outside Sign Auth?	None
Design or Construction Reww?	Construction
PSoft Account 1	9001P2792
Amount 1	65,017.00

Once you complete the required fields, close and save the contract (use ). It will auto-route to the next queue after approximately 1 minute. You cannot manually forward it.

If you do not enter a value or select a value for each of these required fields, your contract will not auto-route forward. It will sit in the CTR Approval Start queue.

You will receive an e-mail notification if your contract sits in the Start queue for over 30 minutes. Use the link from the e-mail to log back into ImageNow and be taken directly to complete the required fields. Close and Save the contract.

2. How do I search for a contract?

Use the created filters in the document views to see all contracts OR search for specific contracts by document key values.

- [-]  Fac Mgmt Contracts
 -  By Contract No.
 -  By Project Manager 1
 -  By Project No.
 -  By Project No./Contract No.
- [-]  Fac Mgmt Contracts - Acctg
 -  By Encumbrance Range
 -  By PSoft Account

Click on the view name and the return grid will look like this:

Workflow Status	Project No.	Contract No.	Amend Type	Amend #	Vendor
Idle	C112-2013	017-15	Original Contract	---	ICE Automation
Idle	179-2014	018-15	Original Contract	---	AVS Builders, Inc.
Idle	312-2014	019-15	Original Contract	---	Hughes Litton G...
Idle	210-2014	020-15	Original Contract	---	Professional Envi...
Completed	364-2011	788-14	Original Contract	---	Professional Envi...
Completed	123-2014	683-14	Original Contract	---	Professional Envi...
Completed	091-2012	739-14	Original Contract	---	Shepco Paving, I...
Idle	043-2014	021-15	Original Contract	---	Professional Envi...
Completed	252-2014	969-14	Original Contract	---	Woodwind Const...
Idle	C046-2014	022-15	Original Contract	---	Cardno ATC
Completed	C109-2012	284-12	Original Contract	---	Penta Engineering

Use any of the filters (identified by the filter icon next to it) to search for specifics.

3. How can I create a personal filter to show only documents where I am Manager?

You can use the created views to make filters that show only your documents.

1. Click on the view of the document type you want to see. The grid of all documents will show.
2. Use the Quick Search tab to choose 'Custom Property' from the drop down.

The Custom Property window will pop up.

3. Choose 'Manager 1' from the Custom Property box.

4. Choose the qualifier 'is equal to' and choose your name from the drop-down box.

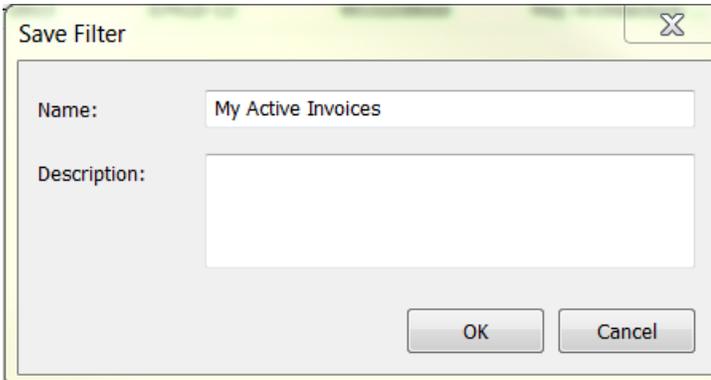


5. Click the green 'Go' at the end of the Quick Search bar to view the results of your filter.

6. To Save this filter, click the Save Filter icon in the toolbar.

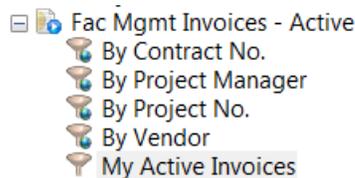


7. Name your filter:



8. Click Ok.

9. Your personal filter will populate in the list of filters associated with the document view.



4. What does the "Workflow Status" in the grid mean?

The Workflow Status column will show "Completed" after the contract has been processed by the contract officers, which is the last stop in the approval workflow. It is in the CTR Approval Complete.

The Workflow Status column will show a blank after the contract has been complete over 7 days. The contract will then be moved to the archive. Contracts that have been archived are not in workflow, therefore no workflow queue and no workflow status.

Workflow Status will show "Idle" if the contract is not open or being acted upon.

Workflow Status will show "Working" if the contract is open and being acted upon.

5. Once I find a contract, can I edit it?

The Workflow Queue column in the grid tells you what queue the contract is in.

PMs have editing rights in (1) the CTR Approval Start workflow queue when the contract is first captured and in (2) the CTR Return to PM workflow queue if the contract has been returned by an approver.

A PM may edit a contract only if they are in one of these 2 queues.

6. If a contract is in a workflow queue that I have access to, how do I edit it?

The Document views where the search tools and filters are found are for searching for and viewing documents. The contract must be open in workflow in a queue that you have edit rights in to be able edit it.

1. Locate the contract in the grid.
2. Double-click on the contract line item. The item will open in the viewer.
3. In the menu bar, click Workflow. If you have edit rights on the workflow queue where the contract resides, click 'Open in Workflow'.
4. Edit the contract.
5. Save and close (use ).

7. Once I make changes to the contract, how do I route it back into the approval process?

Click the Route Forward button  at the bottom of the window to route the document forward back to the CTR Approval Start queue.

Or from the grid,

1. right-click on the contract line item,
2. Click on Workflow->Route Forward.

8. How would an approver route a contract back to the originating PM?

1. If you need to return a contract for a PM to review or correct, click the  annotation in the annotation bar, then click on the document to write a text annotation stating what needs to be



corrected.

2. OK out and your text should annotate the page.

3. Click the Route Forward button  at the bottom of the window to route the document forward to the CTR Return to PM queue.

9. Will the PM be notified that a contract has been returned?

Yes, the PM will be notified by e-mail if a contract where he/she is selected as Manager 1 is returned for review or correction. The PM can use the ImageNow link or the WebNow link to login to the CTR Return to PM workflow queue.

10. How will a PM know when a contract has completed approval routing?

The Workflow Status column will show **“Completed”** after the contract has been processed by the contract officers, which is the last stop in the approval workflow. The contract will then auto-route to the CTR Approval Complete queue where it will sit for 7 days.

The Workflow Status column will show a **blank** after the contract has been complete over 7 days. The contract will then be moved to the archive. Contracts that have been archived are not in workflow, therefore no workflow queue and no workflow status.

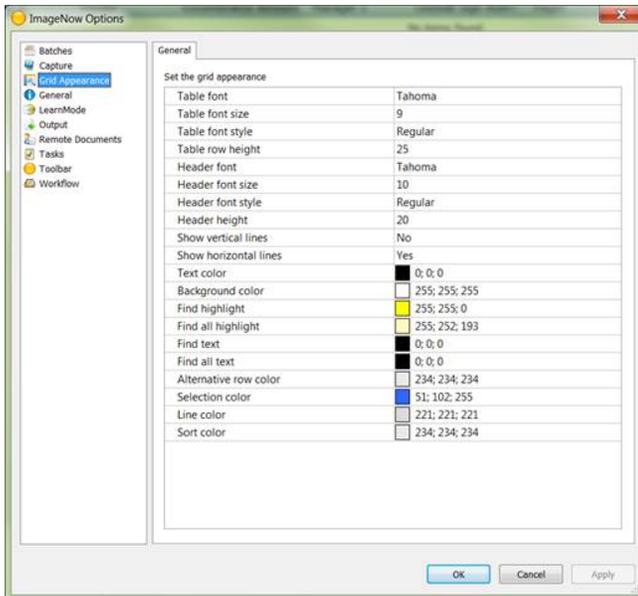
 Workflow Status	Project No.	Contract No.	Amend Type	Amend #	Vendor
 Idle	C112-2013	017-15	Original Contract	---	ICE Automation
 Idle	179-2014	018-15	Original Contract	---	AVS Builders, Inc.
 Idle	312-2014	019-15	Original Contract	---	Hughes Litton G...
 Idle	210-2014	020-15	Original Contract	---	Professional Envi...
 Completed	364-2011	788-14	Original Contract	---	Professional Envi...
 Completed	123-2014	683-14	Original Contract	---	Professional Envi...
 Completed	091-2012	739-14	Original Contract	---	Shepco Paving, I...
 Idle	043-2014	021-15	Original Contract	---	Professional Envi...
 Completed	252-2014	969-14	Original Contract	---	Woodwind Const...
 Idle	C046-2014	022-15	Original Contract	---	Cardno ATC
 Completed	C109-2012	284-12	Original Contract	---	Penta Engineering

Workflow Status will show **“Idle”** if the contract is not open or being acted upon.

Workflow Status will show **“Working”** if the contract is open and being acted upon.

11. How can I change the appearance of my grid?

1. On your toolbar, click Settings->Options or File->Options.
2. In the ImageNow Options window, click Grid Appearance in the left menu.
3. In the grid appearance options, you can change the size and style of the header font (which will resize the columns so you don't have to scroll) and the table font among other items.



4. Apply and OK out.

12. Is there a way to trace the path of a contract?

Yes, the history of the workflow path is always available.

1. From the grid, right-click on the line item and click Properties at the bottom of the menu OR if you have the item open in the viewer click File->Properties.
2. Click the '+' to the left of Workflow in the left margin.
3. Click on the queue name below the Workflow.
4. Click on the History tab to the right.

The screenshot shows a 'Document Properties' dialog box with a 'Details' tab. It contains a table with the following data:

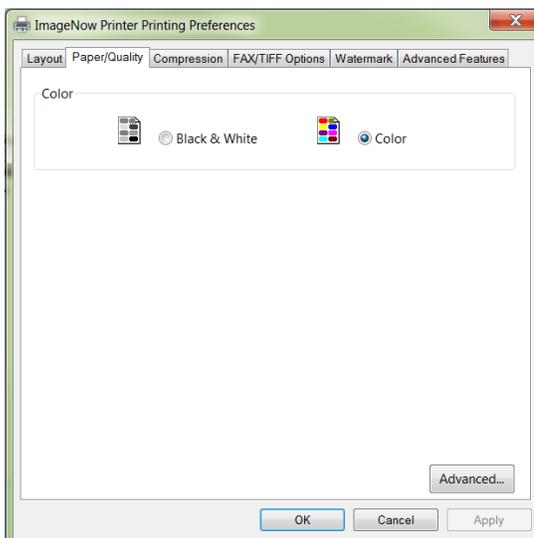
Status	Reason	Last Event Time	Queue Name	User Name
Idle	Created	7/11/2014	CTR Approval Start	tcorso3
Finished	Routed Out	7/12/2014	CTR Approval Start	kgibson33
Idle	Routed In	7/12/2014	CTR Contract Offc >\$100K Appr	kgibson33
Working	Set to Wor...	7/12/2014	CTR Contract Offc >\$100K Appr	intool_001
Finished	Routed Out...	7/12/2014	CTR Contract Offc >\$100K Appr	intool_001
Completed	Routed In -...	7/12/2014	CTR Approval Complete	intool_001

The grid will give you the document status, action (reason), time of the action, queue name where the action occurred, the user who completed the action.

13. How can I ImageNow Print in color to ImageNow?

1. In your Devices and Printers area, find the ImageNow Printer.
2. Right-click on the ImageNow Printer.
3. Click on Printing Preferences
4. In the **ImageNow Printer Printing Preferences** dialog box, perform the following steps to print your document in color:

1. On the Paper/Quality tab, verify that Color is selected.



2. On the **Compression** tab, in the **Color Options** section, in the **Color Reduction** list, select **Reduce to Optimal Palette**. Leave all other settings.

Petherick, Gary L

From: Gibson, Karla <karla.gibson@business.gatech.edu>
Sent: Wednesday, June 25, 2014 11:09 AM
To: Patton,Polly; Dahdah,Samuel Joseph; Petherick,Gary L; Chandler,David R
Subject: ImageNow Server Message

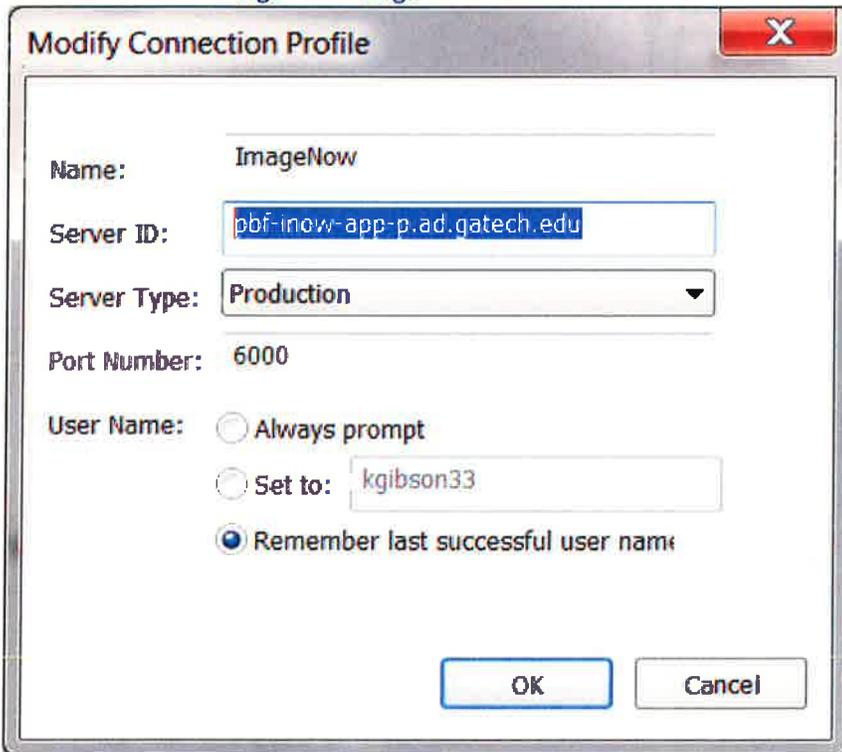
Good morning, all!

Brian has already started to try capture test contracts and got a server disconnected error message. You may get the error as well if your ImageNow client is not reaching the correct server.

Complete these few steps to make sure your client is reaching the correct server:

Go to the Connection Profiles in the upper left corner of the login box.
Open the profile that you see (probably says Default Profile).

Make sure the settings are configured like this:



Modify Connection Profile

Name: ImageNow

Server ID: pbf-inow-app-p.ad.gatech.edu

Server Type: Production

Port Number: 6000

User Name:

- Always prompt
- Set to: kgibson33
- Remember last successful user name

OK Cancel

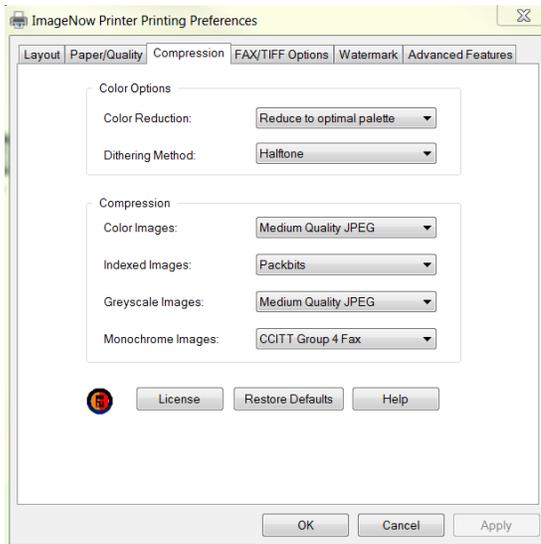
OK out and log back in.

You should be able to login, create your capture profile and work as expected.

Let me know if I can help.

Karla

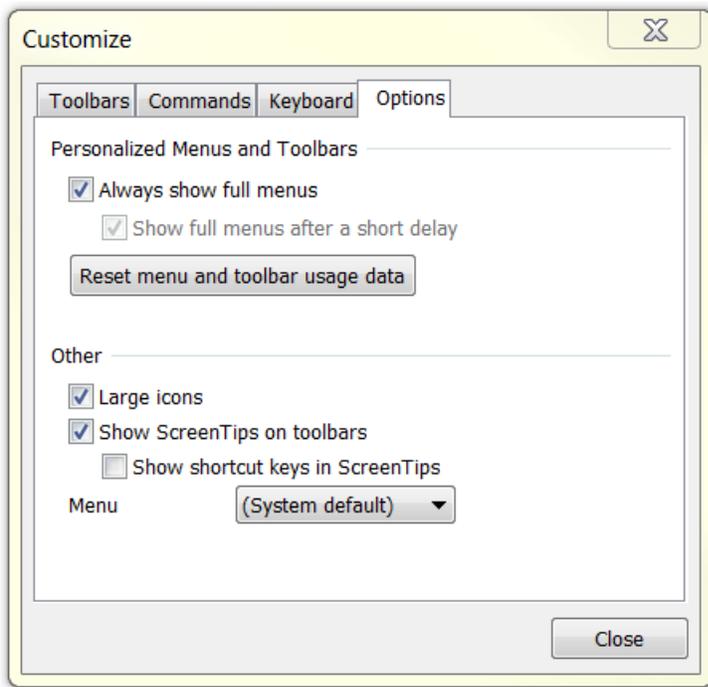
Karla Gibson, MSIT
ImageNow System Administrator
Business Services
Georgia Institute of Technology
711 Marietta St. | Atlanta, GA | 30332-0303



3. To close the **ImageNow Printer Document Properties** dialog box, click **OK**.
4. In the **Print** dialog box, click **OK**. The settings will be retained.
5. Print your document to the ImageNow printer and use the capture profile you created.

14. The icons at the bottom are rather small and hard to read (for me). Is there any way to make them bigger?

1. On the menu, click on View-> Toolbars->Customize.
2. Check the 'Large Icons' box in the Other area.



3. Close.

The size of the buttons should adjust immediately.

15. How do I show/hide the properties window or the thumbnails window?

Hit your F9 key to show/hide the Thumbnails...or you can click View->Thumbnails.

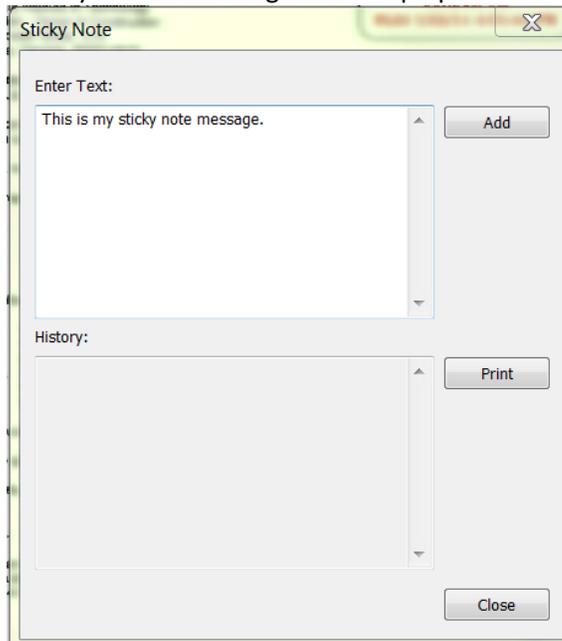
Hit your F7 key to show/hide the Properties window....or you can click View->Properties.

The sticky note is like a running conversation annotation.

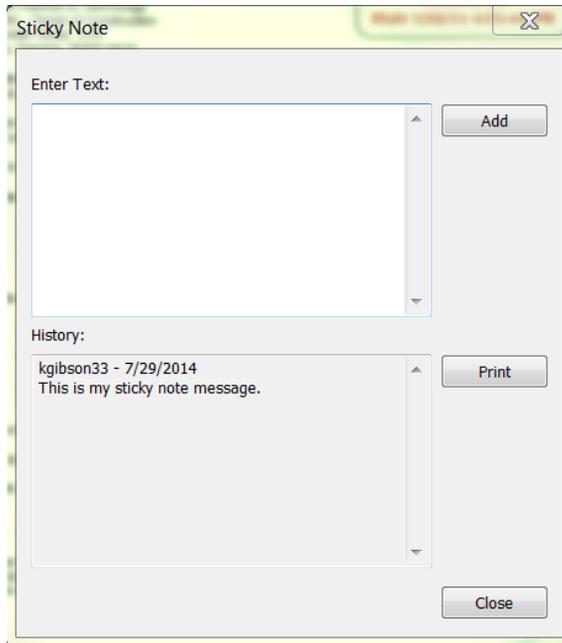
16. How do I add or respond to a sticky note annotation?

To add a sticky note annotation:

1. Click the sticky note button at the top of the viewer. 
2. Click a location on the page. The Sticky Note dialog box will open.
3. Enter your text message in the top open box.



4. Click the 'Add' button on the right to add your text to the sticky note. Your note with a user name and date stamp will move to the History box.



5. Click Close. The sticky note will save when you Save and Close the contract.

To respond to a sticky note that has already been created:

1. Double click on the sticky note to open it.
2. Follow steps 3-5 above.

17. Can I export a view filter to Excel?

Yes, you can.

Create your filter query to show only the contract line items you want to see.

Right-click on any line of the grid.

Click Export Grid.

Give your file a name and a Save destination.(It will save as a .csv file that you will pen with Excel).

Petherick, Gary L

From: Gibson, Karla <karla.gibson@business.gatech.edu>
Sent: Wednesday, June 25, 2014 11:09 AM
To: Patton,Polly; Dahdah,Samuel Joseph; Petherick,Gary L; Chandler,David R
Subject: ImageNow Server Message

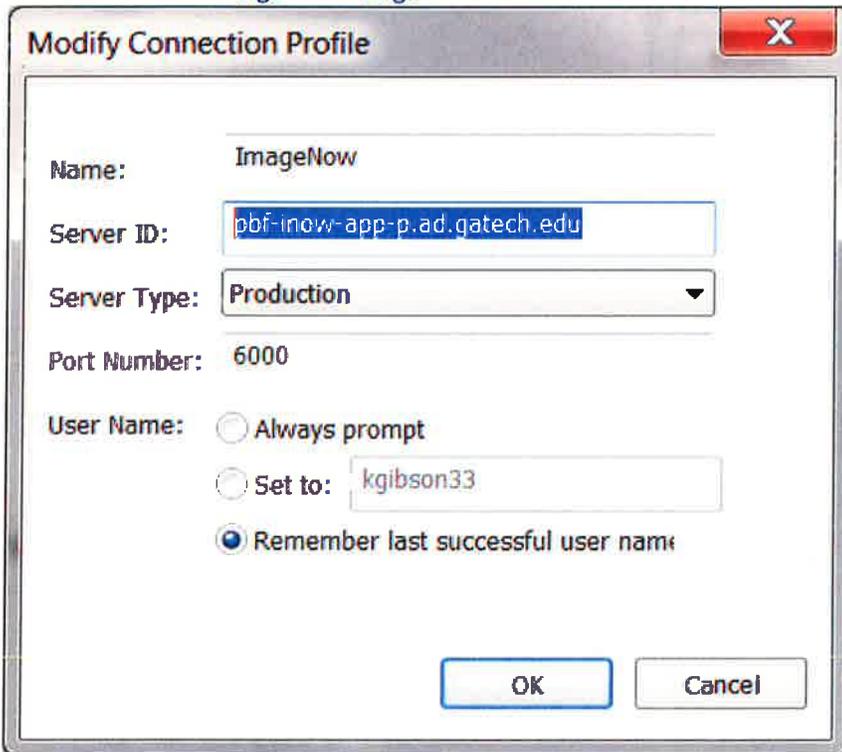
Good morning, all!

Brian has already started to try capture test contracts and got a server disconnected error message. You may get the error as well if your ImageNow client is not reaching the correct server.

Complete these few steps to make sure your client is reaching the correct server:

Go to the Connection Profiles in the upper left corner of the login box.
Open the profile that you see (probably says Default Profile).

Make sure the settings are configured like this:



Modify Connection Profile

Name: ImageNow

Server ID: pbf-inow-app-p.ad.gatech.edu

Server Type: Production

Port Number: 6000

User Name:

- Always prompt
- Set to: kgibson33
- Remember last successful user name

OK Cancel

OK out and log back in.

You should be able to login, create your capture profile and work as expected.

Let me know if I can help.

Karla

Karla Gibson, MSIT
ImageNow System Administrator
Business Services
Georgia Institute of Technology
711 Marietta St. | Atlanta, GA | 30332-0303

Image Now - Process Improvement

November 19, 2014
Business Services Office

Attending: Karla, Lisa, Kim, John, David, Teresa, Donna, Quinae, Ericka, Sharon
Meeting Notes and Decisions in **RED**

A. Invoice Routing

a. Using Text for Notes to Accounts Payable

- i. If we are cutting a payment, should we use the Text feature on the front page (in lieu of a sticky note) so that the note will go on the invoice sent to Accounts Payable? Is this necessary, or does Sharon transfer the notes into the Accounts Payable Image Now.

PROCESS:

- **PMs will be requested to use TEXT on the first page of the actual invoice (not first blank page) and they need to note that they are cutting the invoice.**
- **PMs will be requested to change both invoice payment amount fields when they cut an invoice.**
- **Everyone will put stamps on the first page of the invoice (not first blank page)**
- **Sharon will send the invoice back the PM if they do not follow this procedure.**

PLEASE CUT PAYMENT TO
HOLD CONTRACT OPEN. ←
PAYMENT CUT FROM
\$2,500 to \$2,000. ←
E
APPLICAT

APPLICATION FOR PAYMENT NO. NINETEEN (19)

CERTIFICATE OF THE CONTRACTOR

Custom Properties	
Manager 1	Kim Wilson
Invoice Date	11/11/2014
Invoice Amount	2,000.00 ←
PSoft Account 1	53612530
Amount 1	2,000.00 ←
PSoft Account 2 (optional)	
Amount 2 (optional)	
PSoft Account 3 (optional)	
Amount 3 (optional)	

- b. List of All Queue's – INV Return to Start
i. It would be helpful to have a list of all the Queue's and what they are for

Purchase Order = Ericka

>100 = Teresa

<100 = Donna

Invoice Approval Start or Invoice Return to Approval Start = Quinae

Invoice Accounting Approval = Sharon

- c. Multiple Invoices Submitted in One Email
i. Vendor submits more than one email in a PDF to the email.

PROCESS:

- **Quinae will go into her invoice email, and reply back the vendor and ask the vendor to re-submit the invoices individually. If a GT PM forwards multiple invoices, Quinae will tell the PM to separate them out / get the vendor to separate them out.**
- **Quinae will delete the invoice with multiple copies from the queue.**
- **Everyone will start telling vendors that invoices must be emailed individually.**

- d. Invoice without Invoice Number
i. Document current process. Vendors and PMs will try to look up invoices and the invoice number has been changed by Facilities, so this needs to be clear.

PROCESS:

- **Invoices that do not have a number will be pushed back to the vendor by either the PM or Quinae. The vendor will be requested to submit all invoices with an invoice number. It is preferable if the invoice number is at least 3 digits.**
- **For construction periodic payments, the contract number will be added to the front of the invoice number to make it more searchable. (e.g. for invoice #2, the number would be 0174-13-2).**
- **For all other invoices (consultant invoices), the actual invoice number will be used.**

- e. Deleting Invoices
i. Right now the entire accounting team can delete invoices.

PROCESS:

- **Sharon and Quinae are to be given privileges to delete invoices.**

- f. Invoice Routing – Wrong PM
i. What happens if a PM gets an invoice that does not belong to them? No way to forward back or send to another PM? Right now the only way to move it is to approve it?

PROCESS:

- **Karla fixed the software during the meeting so that a PM can route an invoice back to start that does not belong to them.**

- g. Invoice Routing – more than one peoplesoft account
- i. Sharon asked how to duplicate an invoice to submit to Accounts Payable in Image Now. For invoices with multiple people soft accounts she has to submit the invoice individually for each invoice.

PROCESS:

- **Karla showed Sharon how to copy the document. File, Copy Document; Change PO Number, etc; Click Send to Workflow Queue.**

- h. Windows Issue – Accounts Payable Image Now + Facilities Image Now
- i. Sharon is unable to open the Accounts payable Image Now, and the Facilities Image Now simultaneously. As a result, she has to type everything onto the invoice in text, and then type it in again in Accounts Payable.

This has been resolved.

- i. Purchase Order Invoices – Where to send?
- i. Will purchase order invoices continue to be sent to Accounts Payable, or will they go to the GTFAC invoice email?

PROCESS:

- **Purchase order invoices will continue to go through Accounts Payable. Only contracts with an AiM contract number (i.e. Donna and Teresa's contracts) will go to the GTFAC invoice email.**

- j. Purchase Order Invoices – PM responsibility for Duration in Queue
- i. Once the invoices leave the accounting department and go into the PM queue, what happens?

PROCESS:

- **The invoices age in the PM queue. Everyone, including managers, have visibility to this shared PM queue. There is no action required by accounting once they go to the PM queue.**

- k. Purchase Order Invoices – PM Name and Adding a Project
- i. Should Polly or Reagan's name be used if Ericka starts a new project in the Manager 1 slot?

PROCESS:

- **It is fine to use Polly or Reagan's name in the Manager 1 slot. If it is a larger project, the project will already be set up before furniture is ordered. If it is a furniture order only project, and they are the first to procure something, it is probably one of their projects only. The Manager slots in Project are for convenience only and don't have to perfectly assigned. PMs can search other ways to find their documents.**

B. General Image Now Items

a. Procurement Folder:

- i. How is this going to work? Process for PMs to get this input / get it to Teresa?
- ii. How are we going to handle selection sheets?

PROCESS – Selection Sheets

- PMs will include the selection sheets only when routing in the contract PDF. They will place a note in the notes section of the pages to delete from the PDF when sending contract to vendor. This note will help Donna and Teresa make sure that they are not sending the selection sheet to the vendor.
- Teresa and Donna will need to check through the contract before sending to the vendor to make sure that the PMs have remembered to do this.

PROCESS – Bid / Procurement Documents

- RFP/Q proposals, selection sheets, and bid documents will be stored in the new Meridian document management system.

b. File Size Issue

- i. CM at Risk contracts and invoices are large. Image Now locked up when trying to print to Image Now . What is file size limit? How do we handle this?

This could be a computer speed/ processing issue. Image Now does not have a file size limit.

c. What is Process for Designating Signature Authority:

- i. Do we have a handout on this? Will Lisa handle?

PROCESS:

- **Notify Business Services (Lisa) and the change will have to be made in the software**

d. O&M and EH&S:

- i. Recommend that we use PM names if they are available, but leave these defaults in case we are waiting for a name to be added, or there is a shift in personnel.

PROCESS:

- **We will go ahead and delete generic O&M and EH&S names from the contract routing and invoice system. If new PMs need to be added, they should be directed to Kim or Lisa for the form to have them added to Image Now.**

e. Projects Folder Set Up:

- i. What is our process for setting up the folders? Does Quinae set them up (moving forward) when the PRF comes through (Probably best)? Or, do we wait for the first contract to be routed?

PROCESS:

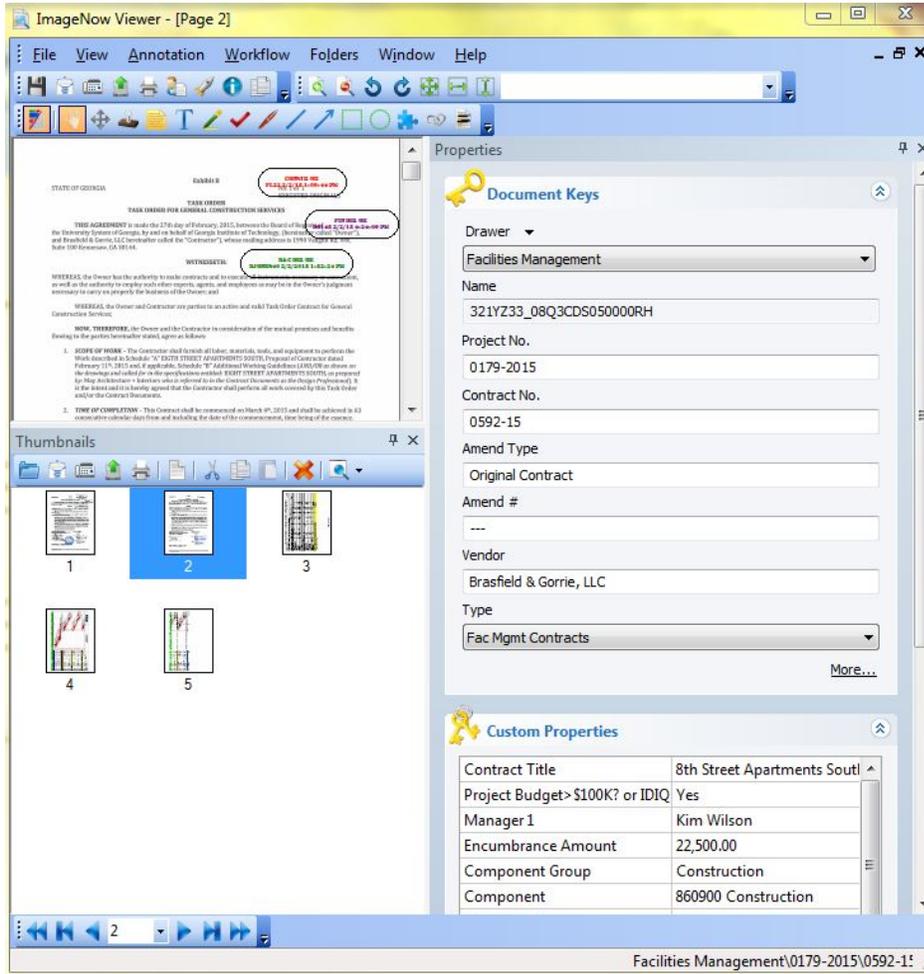
- **Quinae is going to feel this out and will be either adding the folders when the PRF comes through, or when the first invoice comes through. Ericka also adds folders for projects that are managed only by Polly with Purchase Orders (furniture, carpet only jobs).**

- f. Project Name in Project Folder:
- i. Can we add a project name column to the Projects folder?
 - ii. Should we add a second project manager name to the Projects folder?
 - iii. Can we go ahead and fill out , Project Name, Bldg # and Alternate Project #?

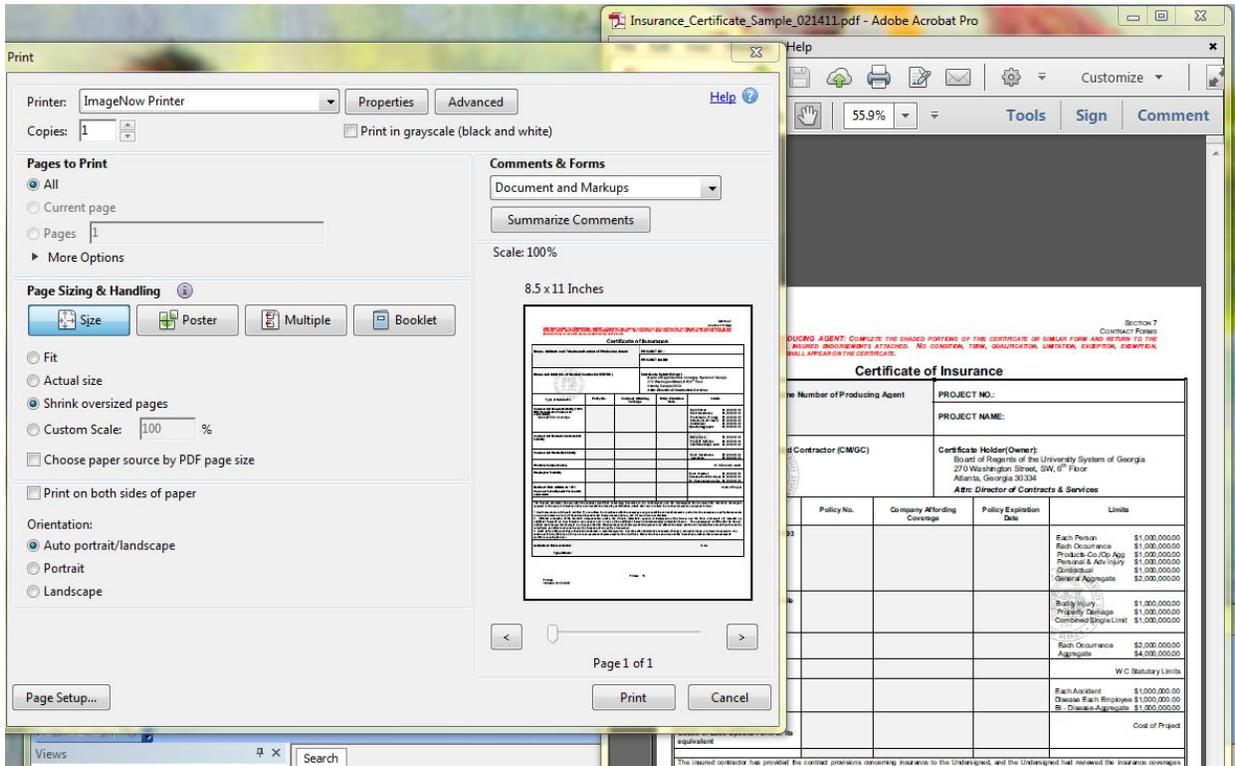
This is complete.

APPENDING CONTRACTS

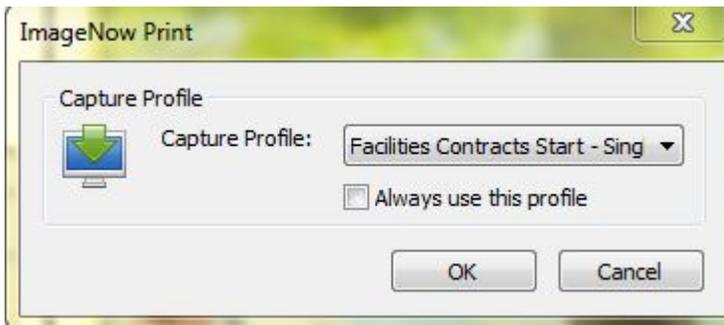
- 1) Open the existing document in Image Now that you want to append (or insert) a new document into.



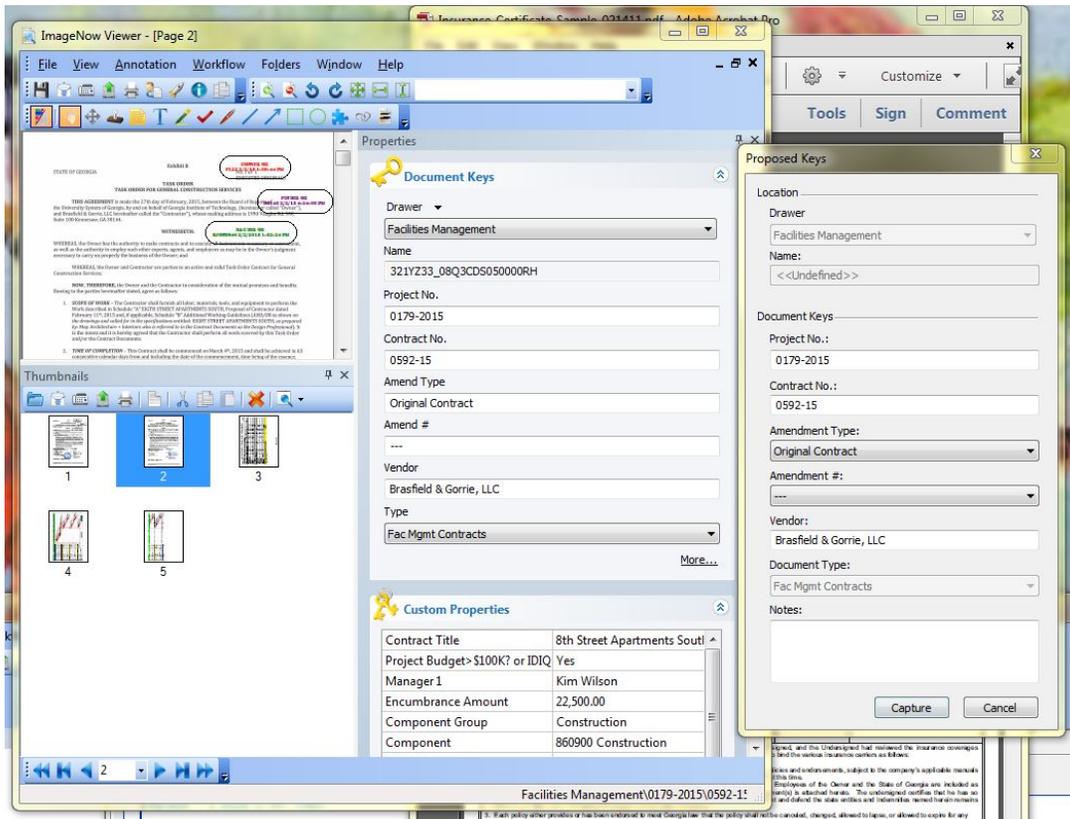
- Open the document that you want to insert (PDF). Go to File, select Print. Select the Image Now Printer. (In this example, we are inserting an insurance certificate to the contract document already in Image Now.)



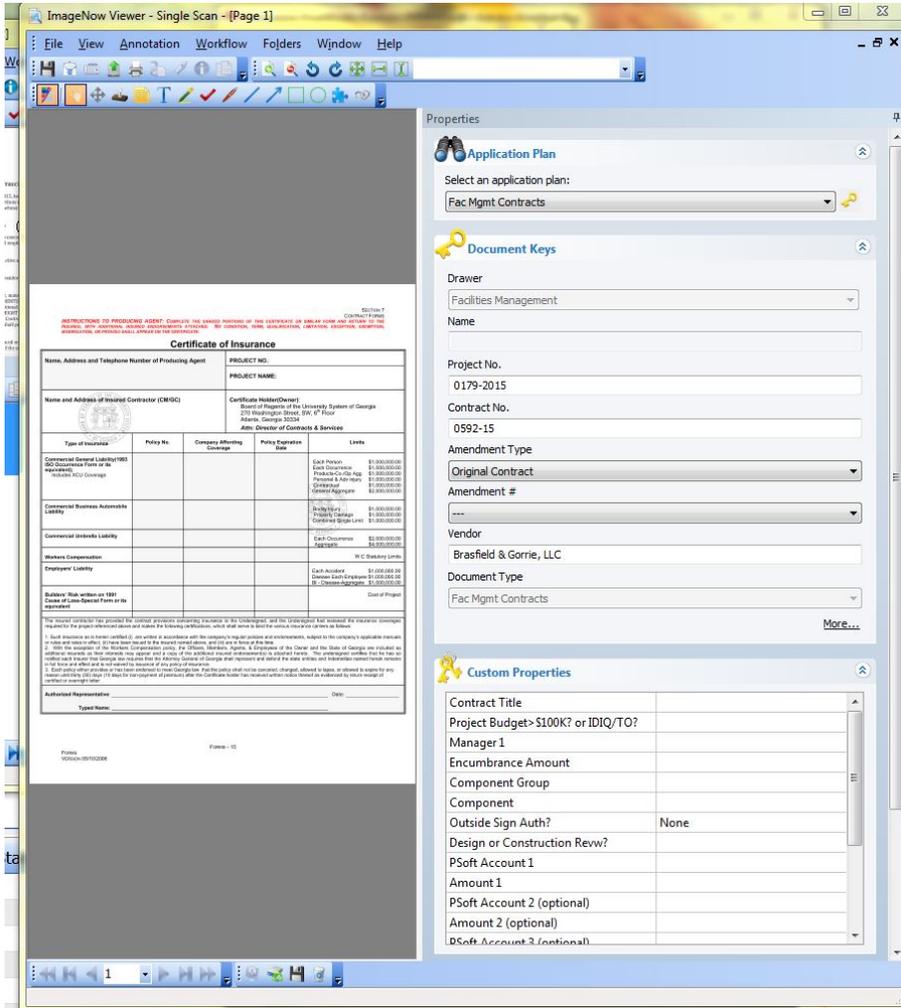
- Click OK when the Capture Profile Box appears.



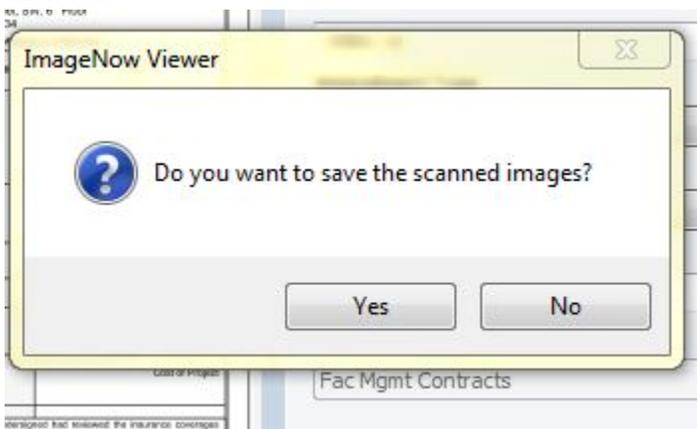
- 5) When the proposed key window comes up, you'll need to fill out the document keys for the document you are inserting to ***exactly*** match the document keys on the existing document. Only the following (5) keys have to be completed: Project Number, Contract Number, Amendment Type, Amendment Number, and Vendor. Click CAPTURE when you are done. NOTE: For fields that are not pull downs, it is recommended that you copy / paste from the original document keys to the new fields so that they match exactly. These keys are the document address, which is why they must be exactly the same.



- 6) When the document that you are appending opens, you do ***NOT*** need to complete any other fields. Simply click the red 'x' to close the document. (You might want to double check that all the fields match exactly first!)

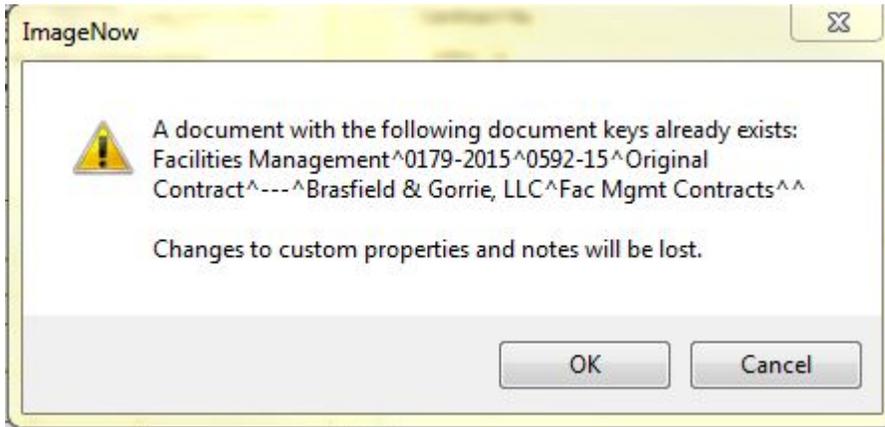


- 7) Click Yes.

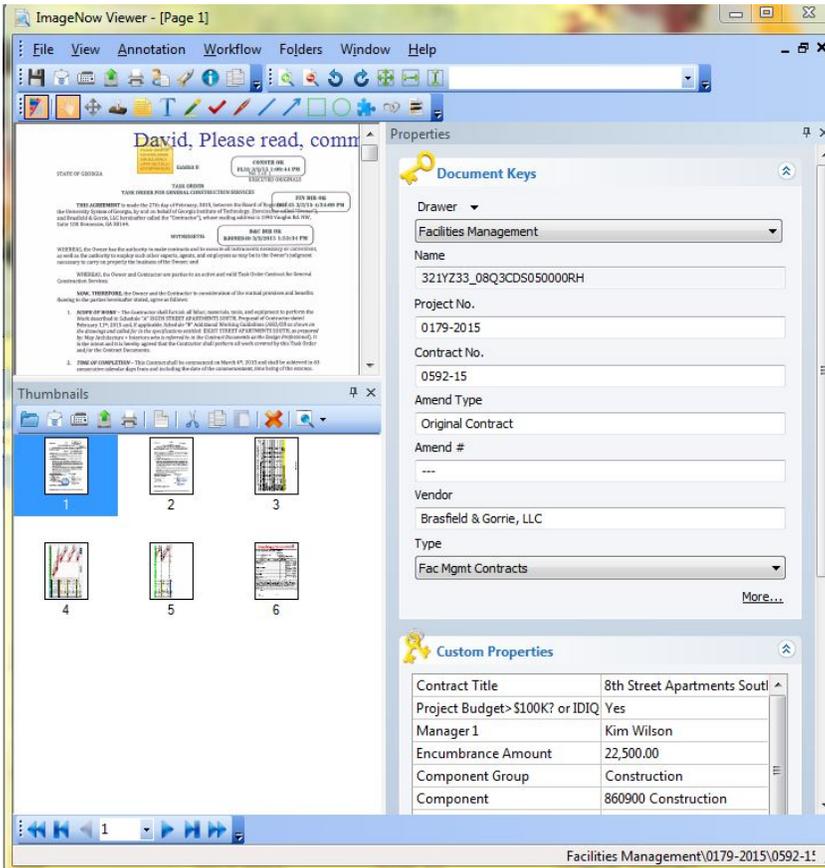


8) If this message comes up, you are on track and your document is going to append correctly. Click OK. (This message is asking if you know that you are about to add to an existing document.)

If this message does NOT come up, you had fields that were not exact and you've created a brand new document in the queue. You'll need to Route it Forward to the accounting department to delete it from the queue.



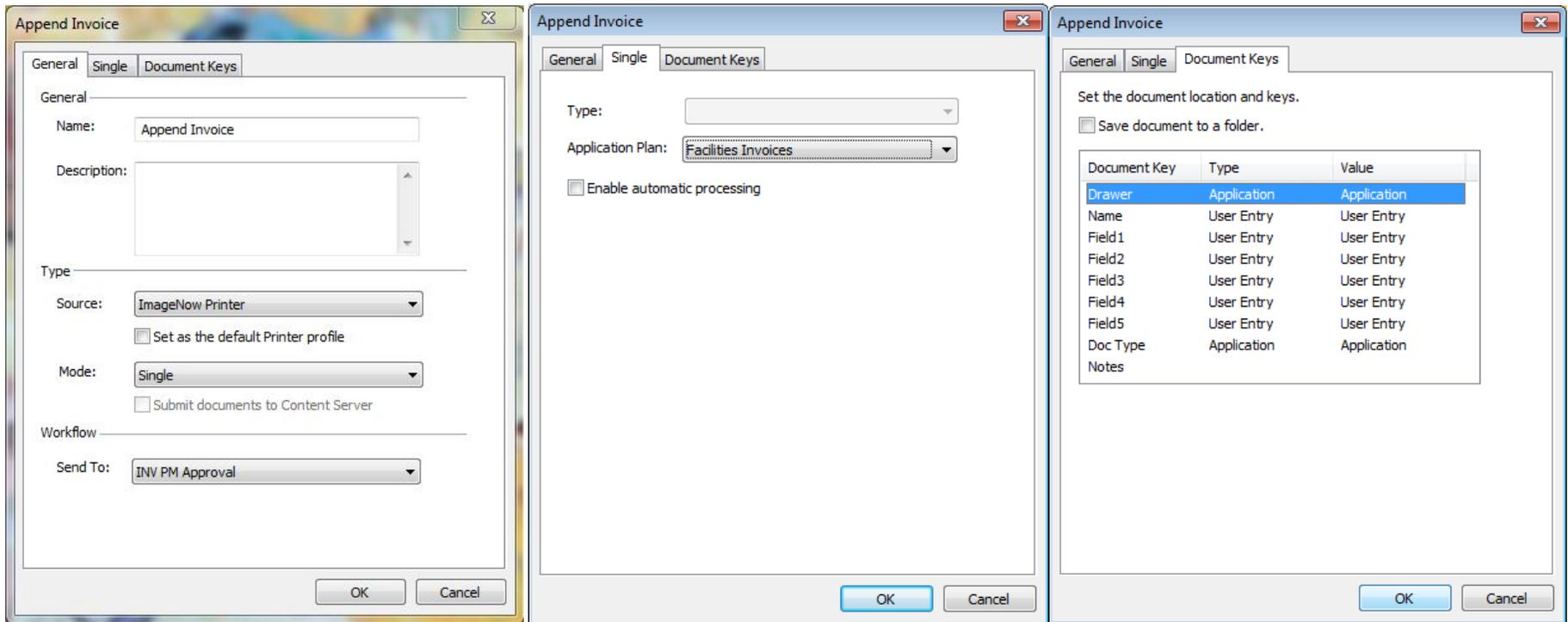
9) Reopen the document that you were appending to, and you'll see the new pages at the end of the document. You can drag and drop them into the order that you prefer.



Facilities - Capture Profile Creation for Appending Invoices

Create Capture Profile (This must be complete ONE TIME only to set up the ability to append)

- A. Log into ImageNow
- B. Click the down arrow to the right of the Capture Button
- C. Click on Manage Capture Profiles
- D. Click on Create
- E. Create a new profile using the following settings on the 3 tabs (settings to match below!).
On the **General Tab**, the **Name:** field should be **Append Invoice**.

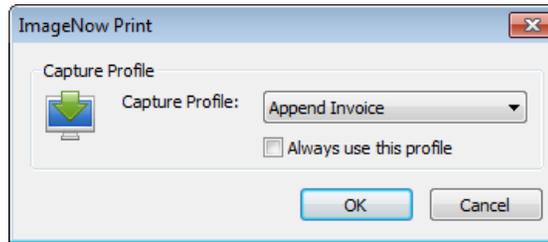


F. **Hit CLOSE**

Facilities – APPENDING INVOICES

Note: In order to append an invoice, you must first set up an Append Invoice capture profile. See above.

- A. Open the invoice that you want to append.
- B. Open the PDF document that you want to add, and Print that document to the ImageNow Printer.
- C. When the below screen appears, select the “Append Invoice” profile from the pull down, and click OK.



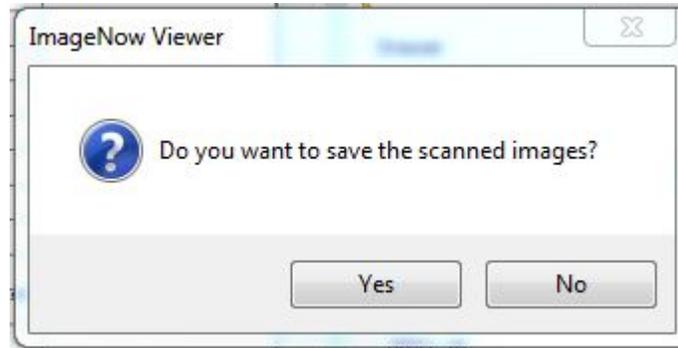
- D. Copy the Document Keys information from the ImageNow document to the blank fields of the document to be appended. You must **copy and paste the following fields** from the original document into the fields of the document being appended: **Name, Project Number, Contract Number, Invoice Number, PO Number, and Vendor Name.**

Drawer	Facilities Management
Name	321YZB6_OEB1S049P0005VZ
Project No.	Tue Oct 06 09:47:35 EDT 2015
Contract No.	ine - Marcus Nanotechnology Building
Invoice No.	NEW
PO Number	
VENDOR NAME	

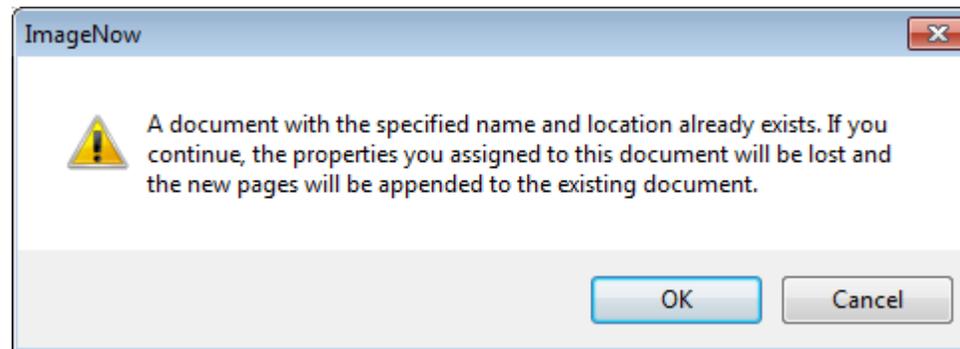
Location	Facilities Management
Drawer	Facilities Management
Name	
Document Keys	
Project No.:	
Contract No.:	
Invoice No.:	
PO Number:	
VENDOR NAME:	
Document Type:	Fac Mgmt Invoices
Notes:	

Location	Facilities Management
Drawer	Facilities Management
Name	321YZB6_OEB1S049P0005VZ
Document Keys	
Project No.:	Tue Oct 06 09:47:35 EDT 2015
Contract No.:	Gilbane - Marcus Nanotechnology Building
Invoice No.:	NEW
PO Number:	1
VENDOR NAME:	vendor
Document Type:	Fac Mgmt Invoices
Notes:	

- E. Click "Capture" and the document will be printed into ImageNow.
- F. Click the Red X (upper right corner) to close the document to be appended.
- G. A prompt will appear asking if you want to save the scanned image: Click YES.



- H. A prompt will appear notifying you that you are adding to an existing document: Click OK.



- I. You will need to close and reopen the original document for the appended document to appear. The document to be appended has been added to the end of the existing document. Note that you can drag and drop the added pages to any location within the existing document.
- J. If you make a mistake, the document will be in the INV PM Approval queue, and you will need to route it forward in workflow to someone in accounting with a sticky note to delete the document that did not append.

◆◆◆ DONE ◆◆◆

Create Two Budget Amendment Capture Profiles. One is used for the initial capture. The second is used to append documents later, should you need to.

Click on **Capture**, then on the pull down menu select **Manage Capture Profiles**. Click **Create**.

Create a Capture Profile “BA – Facilities” for the Budget Amendment Process with the following properties

Enter the data below and all of the field information on each tab below. It must match exactly. Click ~~Close~~ and the profile will be saved.

Red X in upper right corner

The image displays three sequential screenshots of the 'BA - Facilities' configuration dialog box, showing the 'General', 'Single', and 'Document Keys' tabs.

General Tab: The 'Name' field is set to 'BA - Facilities'. The 'Description' field is empty. Under the 'Type' section, 'Source' is 'ImageNow Printer', 'Mode' is 'Single', and 'Send To' is 'BA Approval Start'. There are checkboxes for 'Set as the default Printer profile' and 'Submit documents to Content Server', both of which are unchecked.

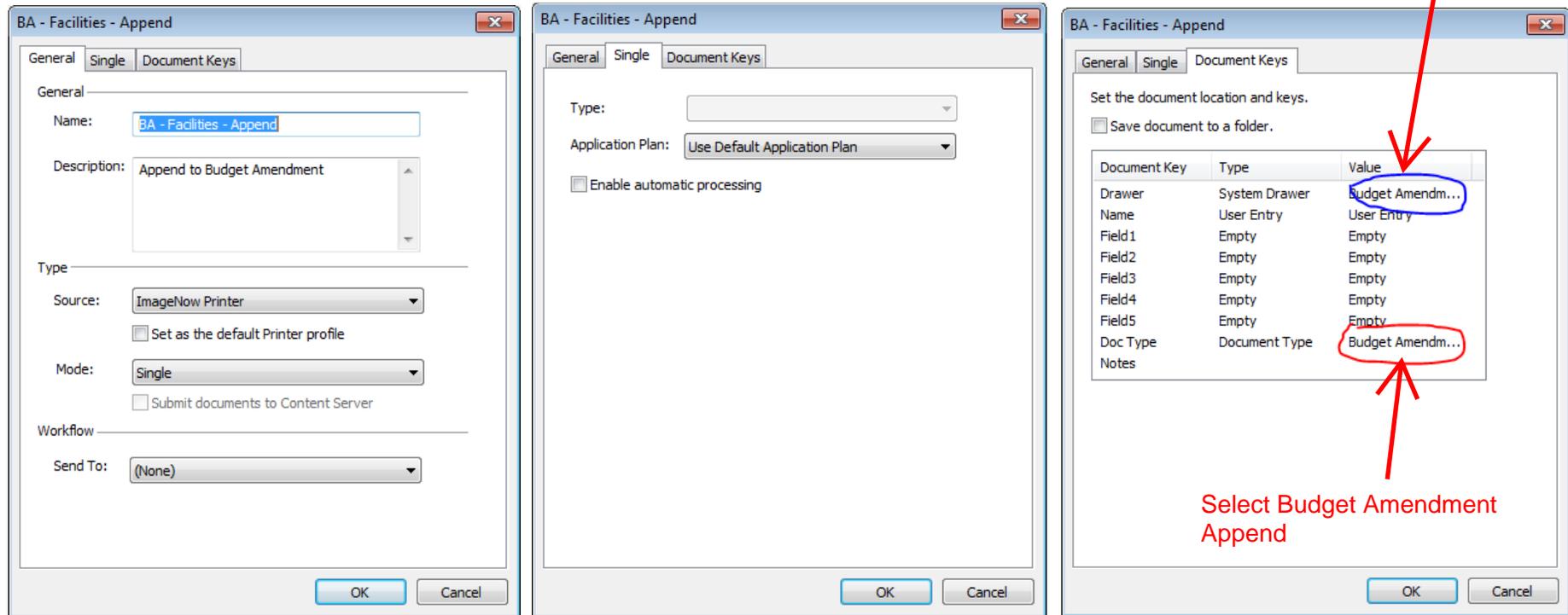
Single Tab: The 'Type' dropdown is empty. The 'Application Plan' dropdown is set to 'Budget Amendments - Facilities'. There is an unchecked checkbox for 'Enable automatic processing'.

Document Keys Tab: The 'Save document to a folder' checkbox is unchecked. A table lists document keys and their values:

Document Key	Type	Value
Drawer	Application	Application
Name	Unique ID	
Field1	Application	Application
Field2	User Entry	User Entry
Field3	User Entry	User Entry
Field4	User Entry	User Entry
Field5	User Entry	User Entry
Doc Type	Application	Application
Notes		

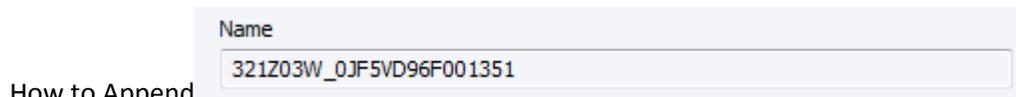
Capture Profile for Appending to Budget Amendments

Create an ImageNow Printer Capture Profile with these settings:



On tab 3 (Document Keys) two items are cut off in this screen shot.

- Drawer should be "Budget Amendments" (circled in blue)
- Doc Type should be "Budget Amendments – Append" (circled in red)



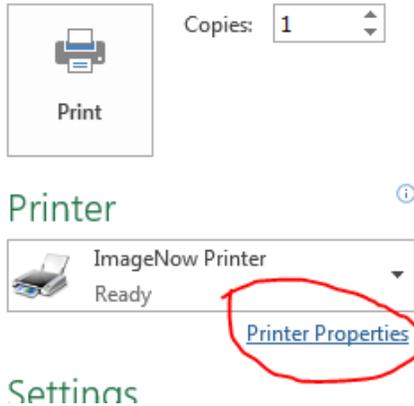
How to Append

1. Open the existing document to be appended to, and copy its name:
2. Close the document.
3. Open the document you want to append. Print it to ImageNow printer, and at the **ImageNow Print** prompt, select the profile "BA- Facilities - Append"
4. At the next prompt for **Proposed Keys**, paste the document name copied from step 1.
5. The document will appear in an ImageNow Viewer window, with the pasted name, all other fields will be empty.
6. Click CAPTURE.
7. When document appears, close with the Red X in upper right hand corner.
8. Open the original document. You will find the new page(s) appended to the end of it.
9. Pages can be moved by dragging and dropping.

How to ImageNow print a Budget Amendment

Complete a Budget Amendment form, and attach any back up into a **single PDF**. Then select print to the ImageNow Printer. Set the Properties as follows:

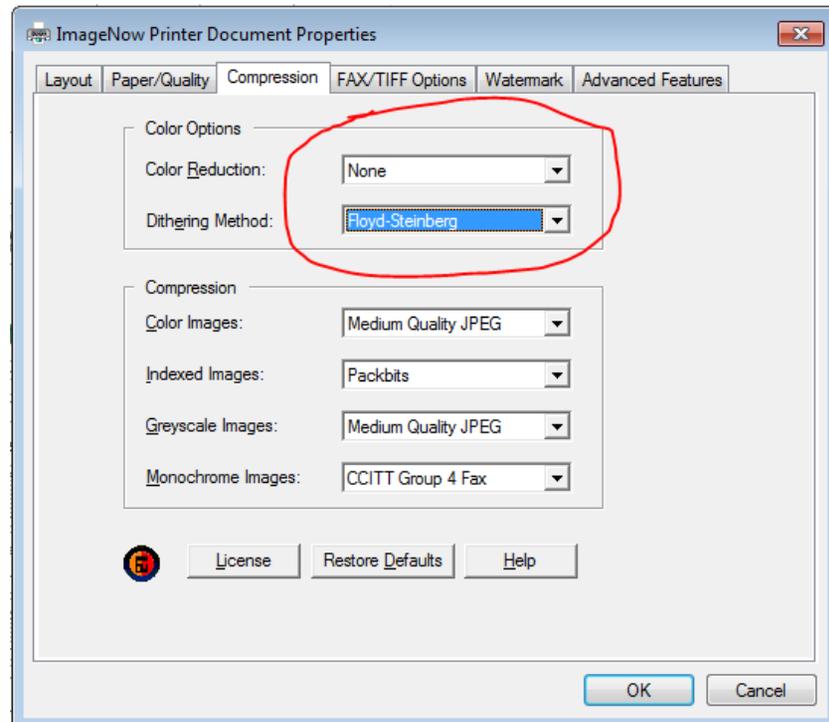
Print



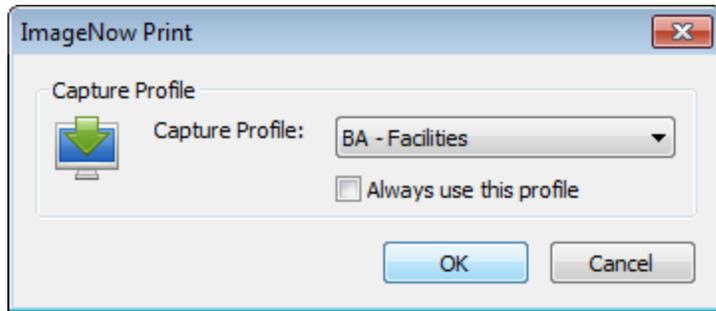
Go to Properties, then select Compression Tab, Change Color Reduction to "None" and Dithering to "Floyd-Steinberg"

Click OK

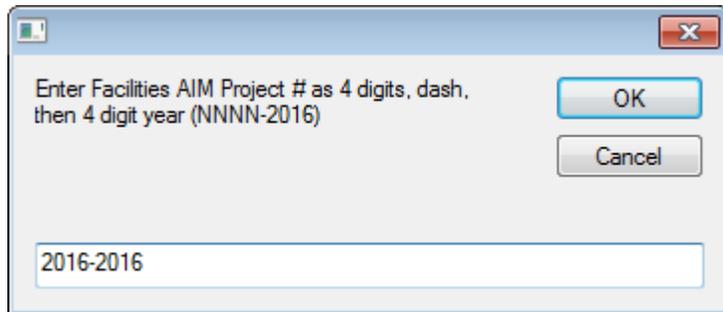
And Select PRINT



Select the BA – Facilities Capture Profile on the pull down menu, then click OK.



You will be prompted for a Project Number (AiM Project Number). Enter the project number in the format xxxx-Year. If this is your first budget amendment on the project and you do not have a project number assigned yet, enter 0000-year (0000-2016). Once funding is approved, a project number will be added later by the Facilities Accounting Department. **Click OK**



Index prompt will appear. Enter other applicable information on the Budget Amendment. Click **Capture**.

Notes:

Amendment #: Use zero if this is the first budget request on a project.

Amount Requested: This is the amount of funding requested in the budget request being routed.

Amended Total Project Budget: This is the total amount of funding requested to date, including the request being routed. Note that if this is your first funding request on a project the amount requested and the Amended Total Project Budget will be the same amount.

The 'Proposed Keys' dialog box contains the following fields and controls:

- Location:** A text input field.
- Drawer:** A dropdown menu with 'Budget Amendments' selected.
- Name:** A text input field containing '<<Unique ID>>'.
- Document Keys:**
 - Facilities Proj. #:** A text input field containing '2016-2016'.
 - Amendment #:** An empty text input field.
 - Amount Requested:** An empty text input field.
 - Amnd Ttl Proj Budget:** An empty text input field.
- Project Title:** An empty text input field.
- Document Type:** A dropdown menu with 'Budget Amendments - Facilities' selected.
- Notes:** A large empty text area.
- Buttons:** 'Capture' and 'Cancel' buttons at the bottom.

The 'Proposed Keys' dialog box contains the following fields and controls:

- Location:** A text input field.
- Drawer:** A dropdown menu with 'Budget Amendments' selected.
- Name:** A text input field containing '<<Unique ID>>'.
- Document Keys:**
 - Facilities Proj. #:** A text input field containing '2016-2016'.
 - Amendment #:** A text input field containing '0'.
 - Amount Requested:** A text input field containing '5000'.
 - Amnd Ttl Proj Budget:** A text input field containing '500000'.
- Project Title:** A text input field containing 'Big Campus Project I'.
- Document Type:** A dropdown menu with 'Budget Amendments - Facilities' selected.
- Notes:** A large empty text area.
- Buttons:** 'Capture' and 'Cancel' buttons at the bottom.

Select Manager 1 and Design or Construction (Required). Click Red X in upper right hand corner to close and save the budget amendment.

Georgia Institute of Technology
Capital Project Budget Request Form

Memorandum

To: Steven G. Swant
 Executive Vice President for Administration and Finance

From: Name: Gregory Beyer
 Title: Construction Project Manager II

Date: _____

It is requested that the project listed below be established/amended.

Project Title: Big Project I

Project Manager(s): Gregory Beyer

PeopleSoft Project Number: 987654321

Facilities (AiM) Project Number: 2016-2016

Project Start & End Dates: _____ Please attach estimated cash flow by fiscal yr for multi yr projects

Project Purpose Statement: _____

Click on line to place Approval stamp

Fill out the following fields:
 Manager 1
 Design or Construction Review
 PS Account/s and Amount/s.

Properties

Application Plan
 Select an application plan:
 Budget Amendments - Facilities

Document Keys

Drawer
 Budget Amendments

Name
 321202X_OHLS57XDP00073L

Facilities Proj. #
 2016-2016

Amendment #
 0

Amount Requested
 5000

Amnd Ttl Proj Budget
 500000

Project Title
 Big Campus Project I

Document Type
 Budget Amendments - Facilities

Custom Properties

Manager 1	Gregory Beyer
Design or Construction Revw?	Construction
PSoft Account 1	
Amount 1	

After completing all Index fields, and the two required Custom Properties, the document will automatically route to either Design or Construction review.

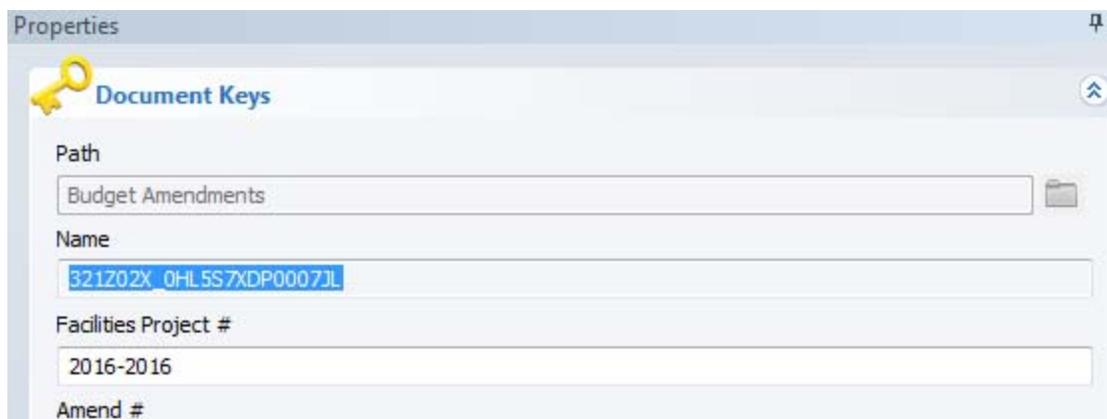
FOUR

Gerald Shumake
Design
0
\$ 1,066,471.00

If this is a budget amendment fill in the Peoplesoft number/s for the project and fill out the amount of funding needed.
 If this is a first time budget request put a zero in the Peoplesoft numbers field, and fill out the amount of funding needed.

Append to a Budget Amendment

To append to an existing Budget Amendment, first Open the BA, and copy contents of the Name field to clipboard:



Properties

Document Keys

Path
Budget Amendments

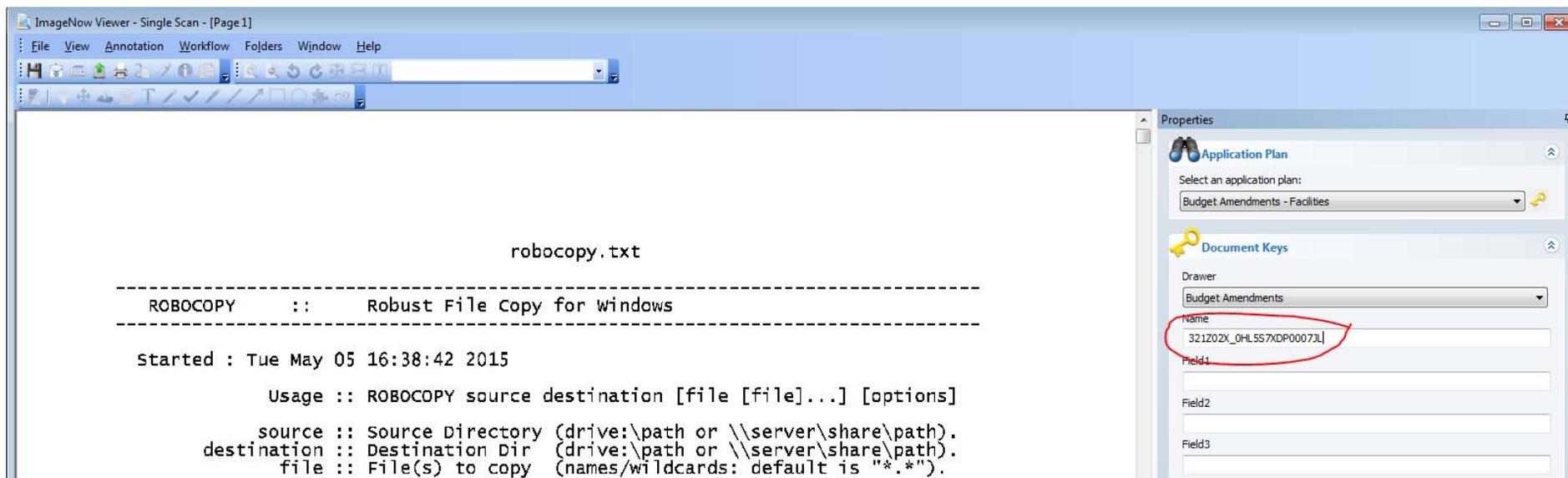
Name
321Z02X_0HL5S7XDP0007JL

Facilities Project #
2016-2016

Amend #

Print the document to be appended, using the ImageNow printer, but select the “BA – Facilities – Append” Capture Profile

Paste the Name into the empty Name index field.



ImageNow Viewer - Single Scan - [Page1]

File View Annotation Workflow Folders Window Help

robocopy.txt

ROBOCOPY :: Robust File Copy for windows

Started : Tue May 05 16:38:42 2015

Usage :: ROBOCOPY source destination [file [file]...] [options]

source :: source Directory (drive:\path or \\server\share\path).
destination :: Destination Dir (drive:\path or \\server\share\path).
file :: File(s) to copy (names/wildcards: default is "*.*").

Properties

Application Plan

Select an application plan:
Budget Amendments - Facilities

Document Keys

Drawer
Budget Amendments

Name
321Z02X_0HL5S7XDP0007JL

Field1

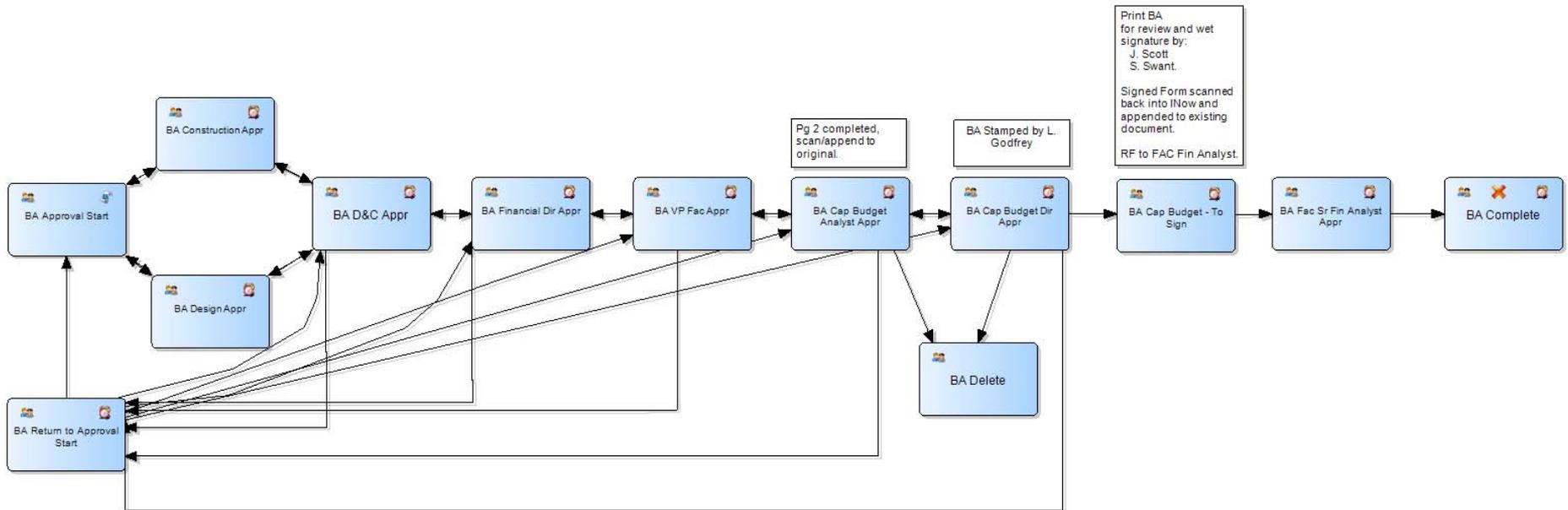
Field2

Field3

Click the Red close button with an 'x' in the upper right hand corner, which will save the scanned Image.

The second document will be appended to the existing Budget Amendment. Note that you will have to reopen or refresh the existing Budget Amendment in order for the appended pages to appear.

Overview of Budget Amendment workflow

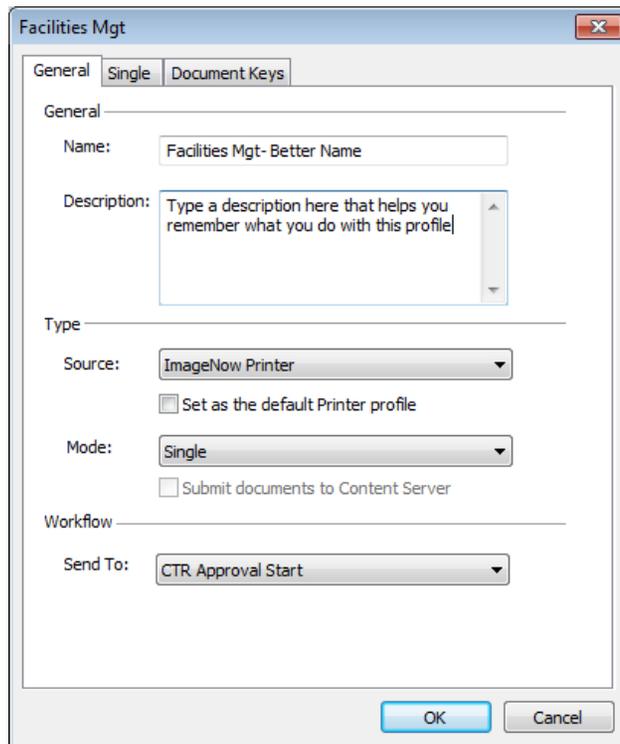
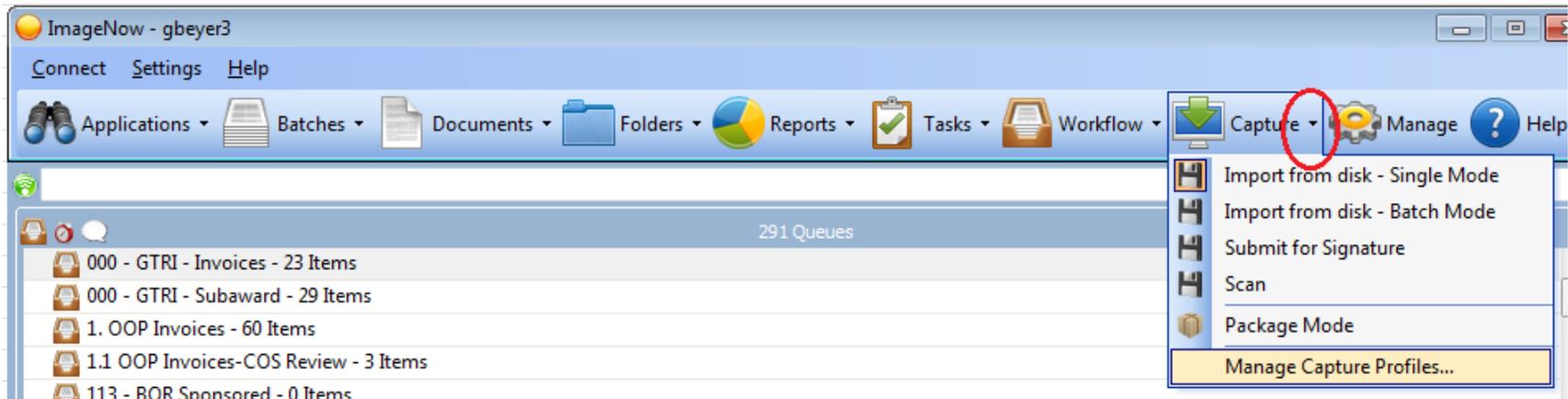


1. PM completes and print-captures only Page 1 of Budget Amendment into BA Approval Start. May use 0000-2016 placeholder if a project number has not yet been assigned.
2. BA forwards to either Construction or Design Appr as appropriate, approver stamps
3. D&C, Financial Dir, VP Fac review and stamp approval
4. Budget Analyst completes only Page 2 of BA, appends it to document, stamps approval
5. Budget Director reviews and stamps BA, doc moves to BA Cap Budget – To Sign.
6. In BA Cap Budget - To Sign
 - a. document is printed to hard copy for review and wet signature by J. Scott and S. Swant
 - b. Signed copy is print-captured back into ImageNow, appended to existing document in ImageNow.
 - c. Document is manually Route Forwarded, to Facilities Sr. Financial Analyst
7. Facs Financial Analyst sets up the project in AIM if it is not already, may increase AIM funding, corrects fictional AIM number if necessary. Stamps Approval
8. Document moves to BA Complete. PM is notified by email that document is in the queue for review.

At any step 1-5, the BA may be sent back to PM for correction. After correction PM may then send it directly back to whomever sent it back.

How to Rename ImageNow Capture Profiles:

Click the small down arrow next to “Capture” Select “Manage Capture Profiles . . .”



A list of Capture Profiles will appear. Click Modify on any, and in the Name: field rename it with a short descriptive name. Put text in the Description to further describe it.

Rename all capture profiles with descriptive names and descriptions.

Budget Amendment Review and Approval by Facilities Approver

1. You will receive an email similar to below, notifying you that you have a document available for review and a direct link to the queue containing the document.

From: ap.ask@business.gatech.edu [mailto:ap.ask@business.gatech.edu]
Sent: Tuesday, March 08, 2016 11:34 AM
To: Rhode, Charles G <chuck.rhode@facilities.gatech.edu>
Subject: WebNow / ImageNow BA VP Fac Appr has 1 documents for review/approval

Document requires your review and approval.

View your queue: <https://www.webnow.gatech.edu/webnow/index.jsp?action=workflow&queue=BA%20VP%20Fac%20Appr>

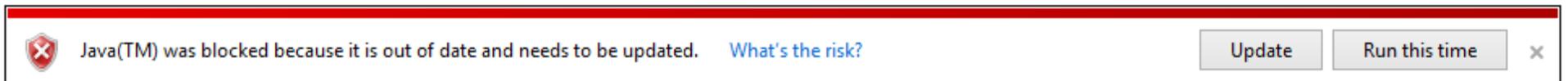
2. Click the link, your browser will open. You may see a message like this. Simply click “Activate Java” or “Run this Time”



Firefox message:

~or~

Internet Explorer message:



3. You'll be prompted to login to WebNow. Enter your regular ATTID and password and click Connect:



4. Your queue (BA VP Fac Appr) with a document for review will automatically open:

Time In Queue	Project Title	Facilities ...	Manager 1	Workflow Qu...	Ame...	Amount Req...	Amend Total Pro...	PSoft Accoun...	Notes	PSoft Account 2 (...)	PSoft Acc
11 minutes 57 ...	REbuild East Campus	0168-2016	Gregory Beyer	BA VP Fac Appr	0	5000	10000000	54646564564	a lot of notes		

5. Double-click the document, and it will open for viewing:

Georgia Institute of Technology
Capital Project Budget Request Form

Memorandum
To: Steven G. Swant
 Executive Vice President for Administration and Finance

From: Name: Joe Project Meister
 Title: Construction Project Manager ii

Date:

It is requested that the project listed below be established/amended.

Project Title: Rebuild West Campus
Project Manager(s):
PeopleSoft Project Number: 10293847
Facilities (AIM) Project Number: 1234-2016

Project Start & End Dates: Please attach estimated cash flow by fiscal yr for multi yr projects

Project Purpose Statement:

New Project Request:		Budget Amendment to Existing Project:	
Original Project Budget Estimate	Updated Project Budget Estimate	Original Project Budget Estimate	Updated Project Budget Estimate
<input type="checkbox"/> Yes <input type="checkbox"/> No			

Type of Project: (check only one)
 Buildings - New Buildings - Renovations
 Improvements Other than Buildings Equipment

Building Information: (see Building List for Building # and name)
 Building # Name:

	Original Budget	Requested Increase (+) or Decrease (-) to Existing Project Budget				Amended Project Budget
		Budget Amendment #1	Budget Amendment #2	Budget Amendment #3	Budget Amendment #4	
Planning/Programming:						0
Consultant/Survey:						0
Design/Construction Documents:						0
Construction:						0
Contingency:						0
FF&E:						0
Facilities Management D&C Fee:						0
Other:						0
Total	0	0	0	0	0	0

Justification for Request: please attach all relevant back-up documentation (quotes, bids, etc.)

1 of 2 Printed 2/16/2016

Document Keys
 Path: Budget Amendments
 Name: 321202H_OH47FVL5Y000F8X
 Facilities Project #: 0168-2016
 Amend #: 0
 Amount Requested: 5000
 Amend Total Proj. Budget: 10000000
 Project Title: REBuild East Campus
 Type: Budget Amendments - Facilities

Custom Properties

Manager 1	Gregory Beyer
Design or Construction Revw?	Construction
PSoft Account 1	54646564564
Amount 1	20,000,000.00
PSoft Account 2 (optional)	
Amount 2 (optional)	
PSoft Account 3 (optional)	
Amount 3 (optional)	

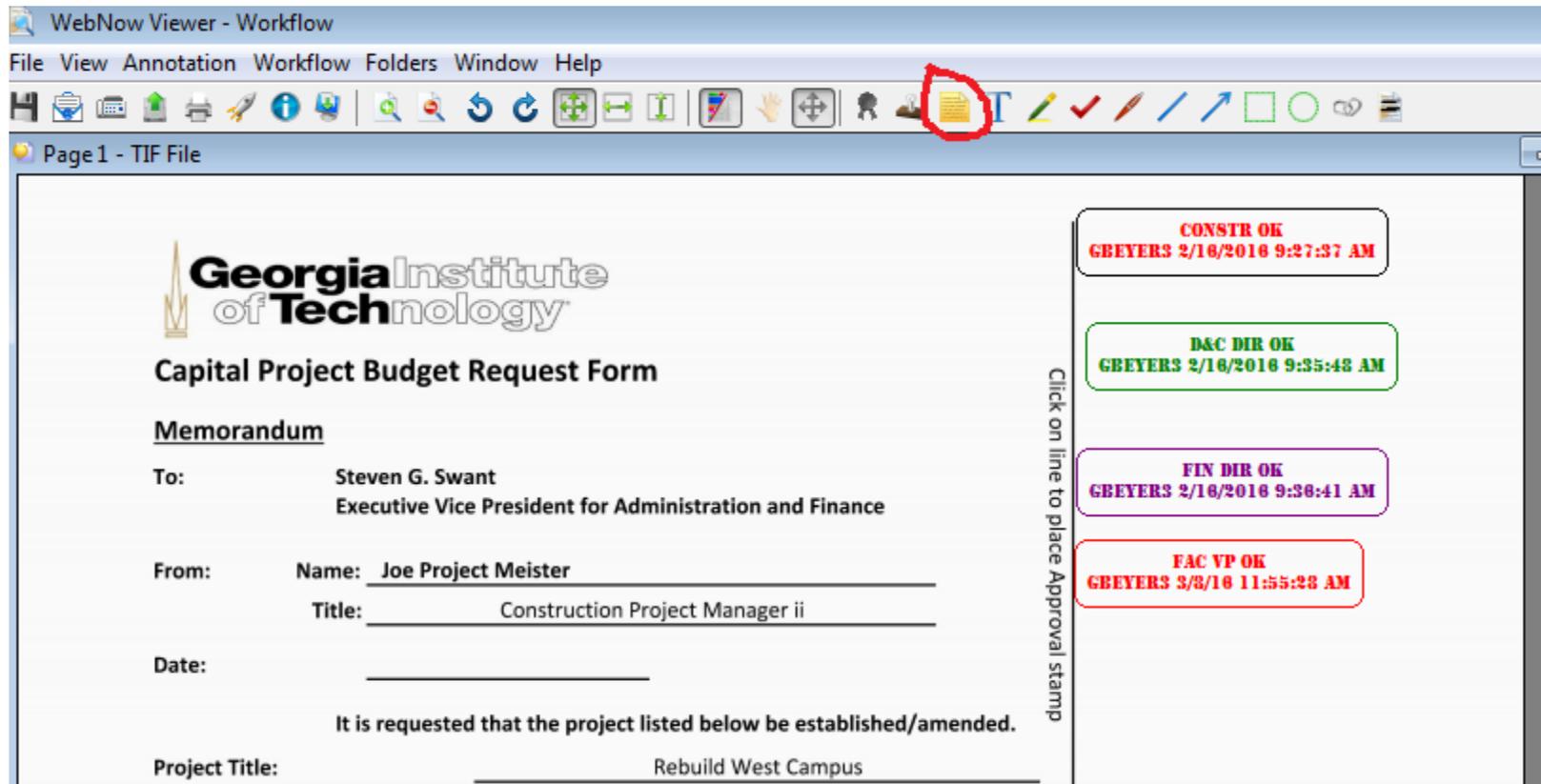
Notes
 a lot of notes

Upper-right, you will notice preceding approval stamps from Construction or Design, D&C Director and Financial Director

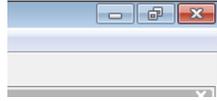
6. Review the Amendment. If you approve, Right-click the Stamp icon, select your “Fac VP OK” stamp. For future documents, your stamp will be pre-selected.



7. Click on the vertical line next to the other stamps to place your stamp. You may also place notes on the document using the yellow sticky note icon.



8. Click the red close button, upper-right .



The document will close and be automatically sent to the next reviewer.

Budget Amendment Review and Approval by Facilities VP

1. You will receive an email like the below notifying you that you have a document available for review and a direct link to the queue containing the document.

From: ap.ask@business.gatech.edu [mailto:ap.ask@business.gatech.edu]
Sent: Tuesday, March 08, 2016 11:34 AM
To: Rhode, Charles G <chuck.rhode@facilities.gatech.edu>
Subject: WebNow / ImageNow BA VP Fac Appr has 1 documents for review/approval

Document requires your review and approval.

View your queue: <https://www.webnow.gatech.edu/webnow/index.jsp?action=workflow&queue=BA%20VP%20Fac%20Appr>

2. Click the link, your browser will open. You may see a message like this. Simply click “Activate Java”



3. You'll be prompted to login to WebNow. Enter your regular ATTID and password and click Connect:



Your queue (BA VP Fac Appr) with a document for review will automatically open:

File Edit View History Bookmarks Tools Help

WebNow 6

https://www.webnow.gatech.edu/webnow/index?rdtoken=1457455115777

webnow

BA VP Fac Appr

Time In Queue	Project Title	Facilities ...	Manager 1	Workflow Qu...	Ame...	Amount Req...	Amend Total Pro...	PSoft Accoun...	Notes	PSoft Account 2 (...)	PSoft Acc
11 minutes 57 ...	REbuld East Campus	0168-2016	Gregory Beyer	BA VP Fac Appr	0	5000	10000000	54646564564	a lot of notes		

4. Double-click the document, and it will open for viewing:

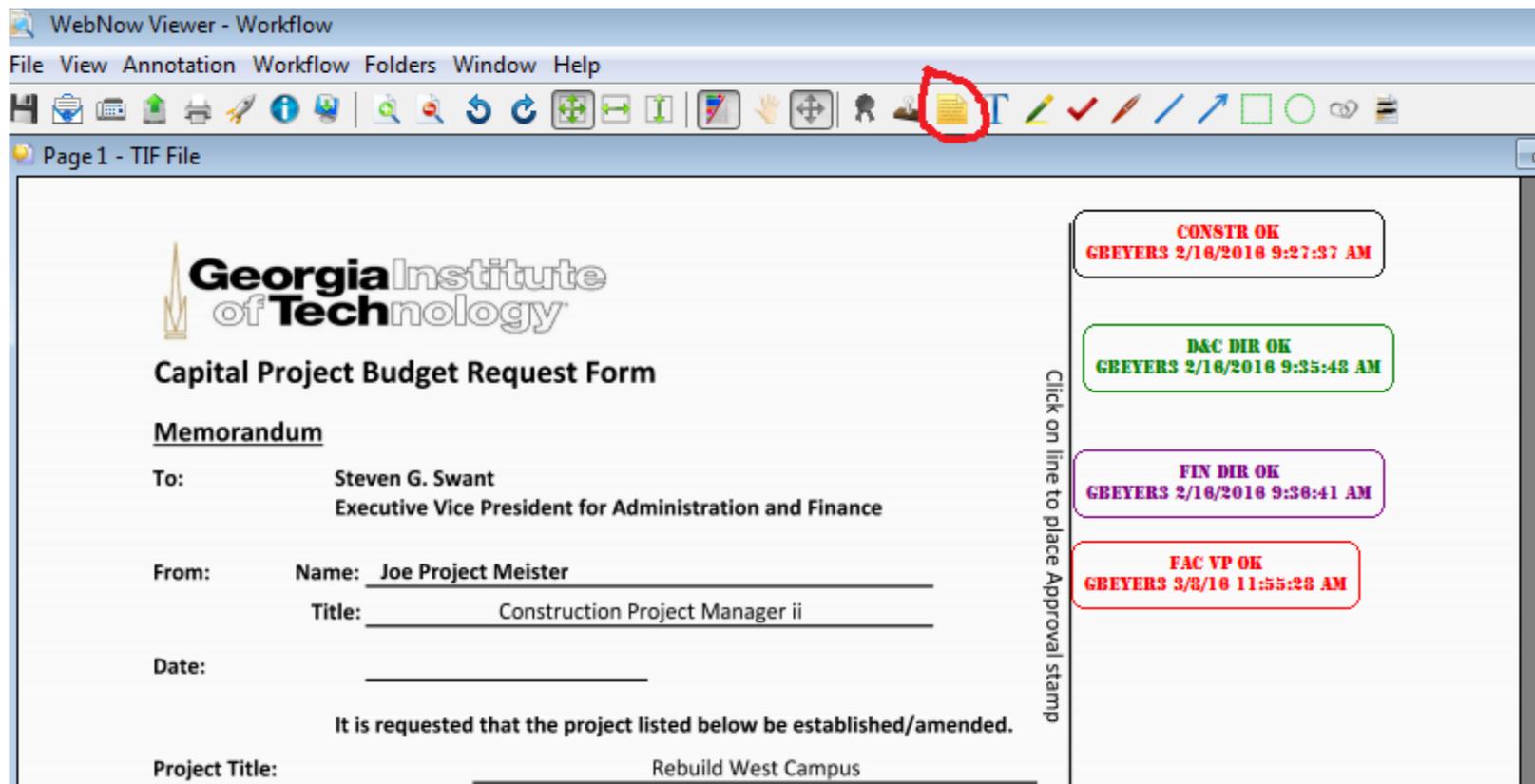
The screenshot shows a web browser window displaying a 'Capital Project Budget Request Form' from the Georgia Institute of Technology. The form is titled 'Memorandum' and is addressed to Steven G. Swant, Executive Vice President for Administration and Finance. The project title is 'Rebuild West Campus'. The form includes sections for 'Project Purpose Statement', 'New Project Request' (with 'Yes' and 'No' checkboxes), and 'Budget Amendment to Existing Project' (also with 'Yes' and 'No' checkboxes). A table titled 'Requested Increase (+) or Decrease (-) to Existing Project Budget' is present, with columns for 'Original Budget', 'Budget Amendment #1', '#2', '#3', '#4', and 'Amended Project Budget'. The 'Total' row shows all values as 0. The form also includes a 'Justification for Request' section and a 'Building Information' section. On the right side of the form, there are three approval stamps: 'CONSTR OK' (dated 2/16/2016 9:52:57 AM), 'D&C DIR OK' (dated 2/16/2016 9:33:48 AM), and 'FIN DIR OK' (dated 2/16/2016 9:28:41 AM). A 'Properties' panel on the right side of the browser window displays 'Document Keys' and 'Custom Properties'. The 'Document Keys' section shows the path 'Budget Amendments' and the name '321202H_OH47FVL5Y000F8X'. The 'Custom Properties' section lists various properties such as 'Manager 1' (Gregory Beyer), 'Design or Construction Revw?' (Construction), and 'Amount 1' (20,000,000.00). The browser window title is 'WebNow Viewer - Workflow' and the page is identified as 'Page 1 - TIF File'. The status bar at the bottom of the browser shows the file path 'Budget Amendments\321202H_OH47FVL5Y000F8X', the user 'BA VP Fac Appr', and the page size 'Page 1 of 1 192,418 K'.

Upper-right, you will notice preceding approval stamps from Construction or Design, D&C Director and Financial Director

- Review the Amendment. If you approve, Right-click the Stamp icon, select your “Fac VP OK” stamp. For future documents, your stamp will be pre-selected.



- Click on the vertical line next to the other stamps to place your stamp. You may also place notes on the document using the yellow sticky note icon.

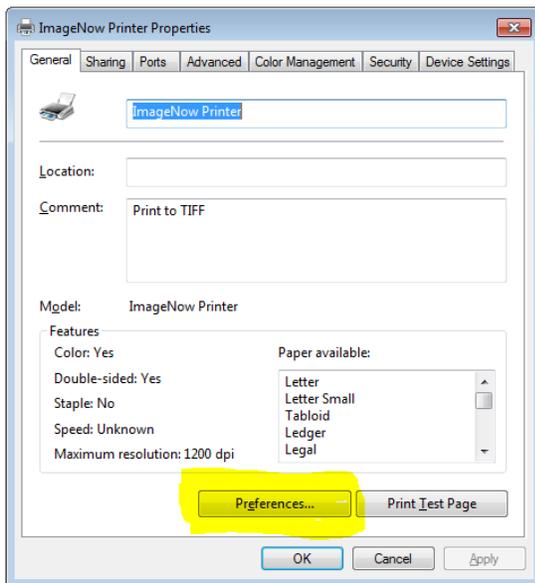


- Click the red close button, upper-right.  The document will close and be automatically sent to the next reviewer.

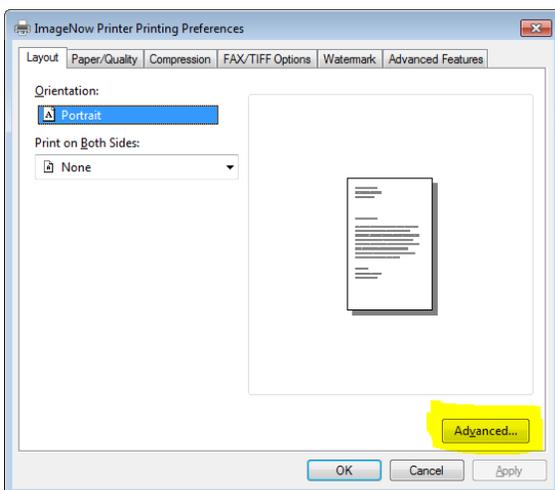
PRINTING QUALITY ISSUES

Contract printing quality varies widely between PMs and between documents. The following shows how to permanently set ImageNow printer properties to produce high quality document captures. You MUST go through Control Panel, Devices & Printers, to make these changes stick from session to session.

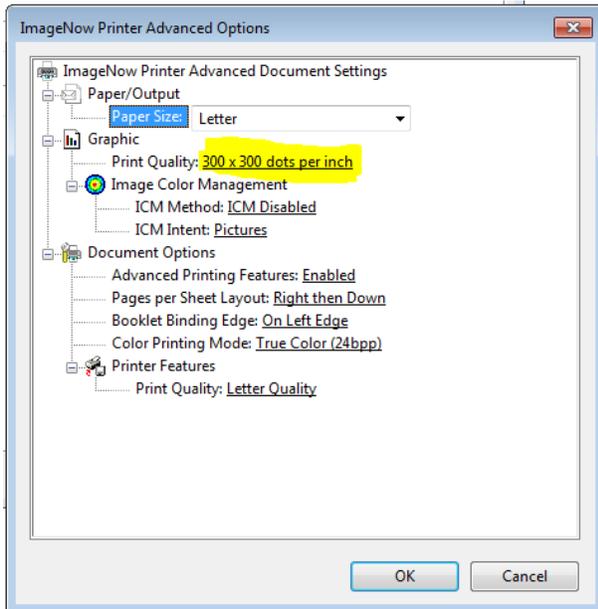
1. Start Button
2. Select Devices and Printers
3. Locate the ImageNow Printer and Right Click.
4. In fly-out menu select "Printer Properties" (NOT Properties at bottom of menu)
5. ImageNow Printer Properties box appears:



6. Click Preferences, ImageNow Printer Printing Preferences box appears:

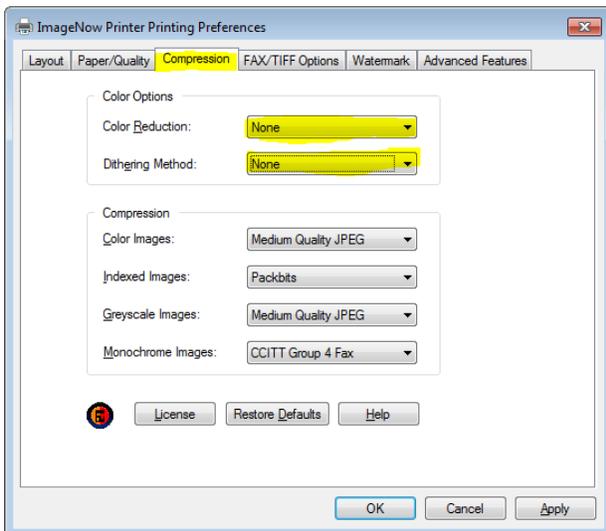


7. Click Advanced, ImageNow Printer Advanced Options box appears:



8. Set print Quality to 300 x 300 dots per inch, and OK.

9. Previous ImageNow Printer Printing Preferences appears, Select the Compression Tab



10. Set Color Reduction to None

11. Set Dithering to None

12. Click OK, OK, and close "Control Panel Devices and Printers".

These printing preferences are now permanently set for your ImageNow printer. Assuming the original is of high quality, your contracts will now be consistently captured in high quality.

Note: When capturing Budget Amendment Excel spreadsheets, follow the Budget Amendment instructions to choose **Floyd-Steinberg** Dithering, to maintain color fidelity for the BA document. You may change dithering temporarily, on-the-fly through printer properties, when printing Budget Amendments.

USE OF ANNOTATIONS ON DOCUMENTS: STICKY NOTES vs TEXT and LINE TOOLS

ABOUT THE TOOLS

Sticky Notes:

Sticky Notes can be utilized to communicate as documents are passed between various reviewers and the document initiator. They keep a running conversation intact on the document file in Image Now. Sticky Notes do not print on the final document when issued. Best practice is to keep a single sticky note with a running conversation – don't start a new sticky note for a reply.

Text or Line Tools:

Text or Line Tools can be used to mark up a document or to edit a document. The mark ups will permanently reside on the document when printed or issued.

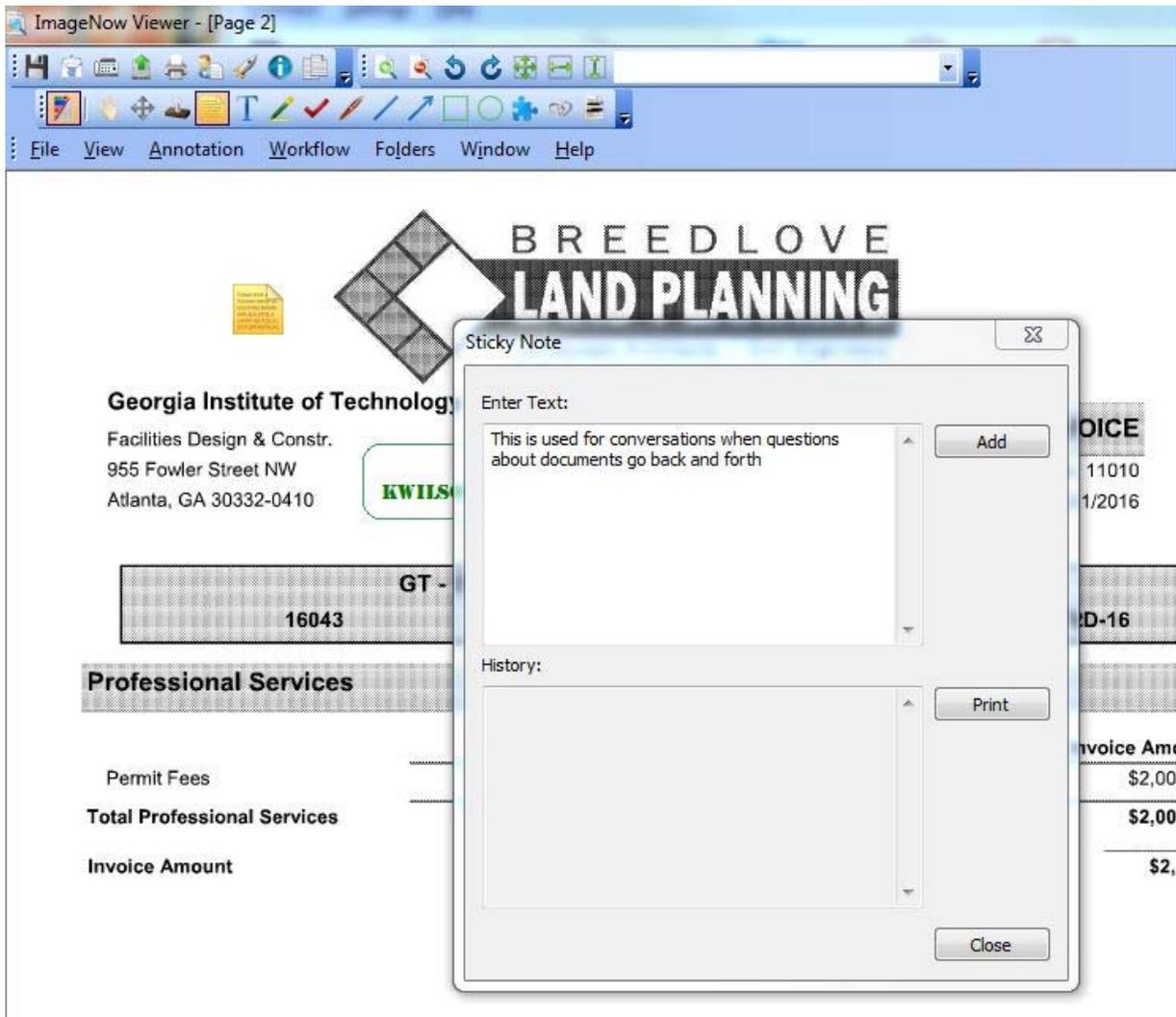


BEST TOOLS FOR THE JOB:

Annotating Contracts: Sticky Notes are the only annotation tool that should be used on contracts. The sticky notes will stay on the contract within Image Now for future reference, but the advantage is that they do not print out on the document when the document is issued to the vendor. We don't want text notes which do print to be used on contracts because a contract is a legal document and we don't want to confuse the vendor with random notes between D&C Facilities Staff.

Annotating Budget Amendments: Use Sticky Notes for conversations. Use Text or Line Tools for minor mark ups on the document. If major changes are required, append new pages into the document.

Annotating Invoices: Text or the Line Tool should be used for any invoice mark ups or notes to accounting that need to move forward with the invoice. For example, if you are cutting payment use the Text or Line Tool. This way the notes will go all the way through to Accounts Payable. It is OK to use Sticky Notes for conversations, but know that they will not go with the document to Accounts Payable once the document leaves Image Now.



Sticky Note
 Example
 Sticky Notes do
 not print

Parking Decks: Final Design & Doc	8,000.00	100.00	8,000.00
Parking Decks: Implementation	3,000.00	100.00	3,000.00
Additional Support Services	5,250.00	100.00	5,250.00
Total Fee	53,250.00		53,250.00
	Previous Fee Billing		49,968.75
	Current Fee Billing		3,281.25

Total Fee	3,281.25
Change Payment Amount to \$2,500. Amendment is coming, need to keep contract open.	Total this Phase \$3,281.25
	Total this Invoice \$6,281.25

Line, Box, and
 Text Example
 These print with
 document

HOW TO CORRECT RESOLUTION ISSUES IN IMAGE NOW

- 1) First go to the control panel and under Hardware and Sound select view devices and printers.
- 2) Right click on the Image Now printer.
- 3) Select printer properties.
- 4) Select Change Properties. It is a select button at the bottom of the display box.
- 5) Select the Preferences button.
- 6) Select the Advance button on the bottom right side.
- 7) Then click on the Print Quality line. This will cause an arrow to appear at the right of the numbers. Select the arrow and scroll down to either 600 x 600 or 720 x 720 dpi.
- 8) Select ok and as the various screens close select the Apply button if it shows up at the bottom of the dialog box or select ok located in the same location. If the Apply button appears and you only select Ok your changes will not be saved as your default.