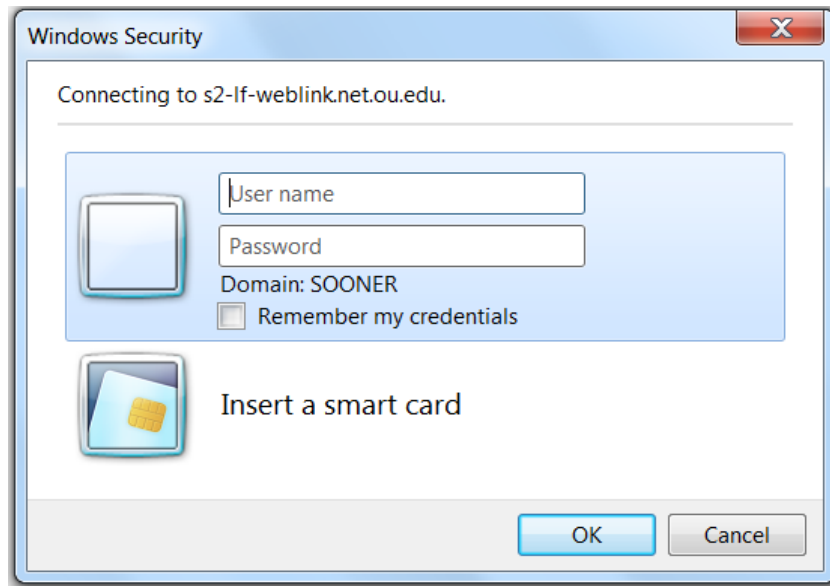


# Viewing Financial Services Documents Utilizing Laserfiche

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**Step 1:** Navigate your web browser to the following website: <http://s2-lf-weblink.net.ou.edu/weblink8>

**Step 2:** Enter your Sooner 4+4 and password *if prompted*. You may not be prompted for your login information. Lock your computer if you are going to be away from it. If your computer is unattended and not locked, someone else could use it to open Laserfiche or any of the other programs that use your Windows login automatically (such as Outlook).



**Step 3:** Click “Document Search”



OU Financial Services Document Repository

[Document Search](#)



**Step 4:** Enter your search criteria and click on “Submit”. Using the appropriate criteria is critical to obtaining the desired search results. It is recommended only 1 or 2 criteria be entered. For example, if you are looking for an invoice paid to supplier ABC from department 122110000, enter “ABC” in the “Supplier/Vendor Name” field and “122110000” in the “Department Nbr” field to limit the search results. Entering more criteria will limit the search results even further. Entering less will result in more search results, i.e. all invoices to supplier ABC will be returned if only the supplier name is entered.



## Please enter your search criteria below

Accounting Begin Date:	<input type="text"/>	
Accounting End Date:	<input type="text"/>	
CC Invoice Nbr/PS Voucher Nbr:	<input type="text"/>	
PO ID Nbr:	<input type="text"/>	
Department Nbr:	<input type="text"/>	
Supplier/Vendor Name:	<input type="text"/>	
Amount Paid by Department:	<input type="text"/>	
Total Invoice Amount:	<input type="text"/>	
Sort by:	Accounting Date	

Documents Provided by OU Financial Services

### Tips for entering search criteria:

- All documents available will have a value for “PO ID Nbr”. **This is the best criteria to use.**
- All other values associated with the document will be added to the documents at the time the invoice is paid.
- The “accounting” date is not added to the document until the invoice is paid. If you are looking for an invoice that has been paid, enter the accounting begin or end date to limit your search results. **If you are not certain the invoice has been paid, do not enter an accounting begin or end date in the search criteria.**
- Partial values can be entered in the search criteria field for Supplier/Vendor Name. For example, entering “Eureka” will retrieve the invoice paid to Eureka Water Co Inc.
- Partial values can be entered in the search criteria field for Amount Paid by Department. If “10” is entered in the search criteria field, all documents with “10” in the department number or the amount will be returned. If “\$10” is entered in the search criteria field, all documents with the amount beginning with “\$10” will be returned. For example, documents with an amount of \$10.50, \$105.00, \$1050, etc will be returned.
- Actual values or blanks must be used for all other search criteria fields to get a result. For example, entering a PO ID number of 400003 will not return any results even though documents exist for PO ID 4000030000.
- “Sort by” value can be selected from the drop down menu. Note: The results are sorted in descending order regardless of the sort by value.

**Step 5:** View your search results and click the name (Voucher \ CC #) of the document you would like to view. The name appears in bold red letters. See example below.

Results 1 - 1 of 1

 **70057956** 

**Delivery Source:** CrimsonCorner  
**Scan Date:** 3/9/2013  
**PO ID:** 4000046346  
**Voucher \ CC #:** 70057956  
**Supplier Name:** EUREKA WATER CO INC  
**Supplier Invoice Nbr:** 0382815  
**Invoice Date:** 2/28/2013  
**Invoice Total Amount:** \$10.50  
**Department Nbr:** 137512800  
**Amount Paid by Dept:** 137512800 - \$10.5  
**Accounting Date:** 3/11/2013  
**Supplier ID:** 0000015604  
**Status:** Complete

View the document and associated metadata. The toolbar contains options to customize your view. The “View Document Only” button will allow you to view the document full screen.



Use to print a document. Laserfiche will create and download a PDF document that can be printed.



Use to email a document. Note: The email may appear in your junk folder. Recipient of email must log in to Laserfiche to open the document.



Use to move the document on the screen.



Use to zoom in on part of the page.



Use to fit the page to the screen.



Use to stretch the page to fit the width of the screen.



Use to display the page on the full screen. (Toolbar and metadata on left of screen will not be visible.) This icon is on the far right side of the screen in the blue bar.

Note: The left part of the screen can display the metadata fields for the document or thumbnail images of the pages of the documents. Annotations to the document can be displayed as well.

The screenshot displays a document viewer interface. On the left, a sidebar contains metadata for a document with ID 70057956, including its last modified date (3/14/2013) and creation date (3/9/2013). Below this, a 'Fields' section lists invoice details such as 'Template: Invoice', 'Delivery Source: CrimsonCorner', 'Scan Date: 3/9/2013', 'PO ID: 4000046346', 'Voucher \ CC #: 70057956', 'Supplier Name: EUREKA WATER CO INC', 'Supplier Invoice Nbr: 0382815', 'Invoice Date: 2/28/2013', and 'Invoice Total Amount: \$10.50'. A red box labeled 'Metadata Fields' points to this section.

The main area shows a scanned invoice from Eureka Water Company. The top toolbar includes icons for 'Print', 'Email', 'Zoom', and 'Fit Width to Screen', each with a red box and arrow pointing to it. The invoice content includes a 'Billing Address Changes?' notice, an 'EMAIL' field, and a table with the following data:

Invoice Date: 02/28/2013	No. 0382815
Account No.:	079680
Please Pay This Amount:	10.50

Below the table, the invoice details for 'OU FINANCIAL SUPPORT SERV' are listed, including the address: 660 FARRINGTON OVAL, NORMAN OK 73019-3003. A 'Pan Tool' icon is highlighted with a red box and arrow. Another red box labeled 'Fit Page to Screen' points to a zoom icon in the toolbar.

At the bottom of the invoice, there is a table with the following data:

Description	Amount	Description	Amount
HC-RNT-HOT AND COLD, MONTHLY,	MAR 2013		

**Step 6:** Close your internet browser window to end your Laserfiche session.

## Important notes regarding the implementation of Laserfiche:

- The initial effort for the new imaging solution has been focused on entering new supplier invoices into Laserfiche.
- Invoice images prior to the implementation date have not yet been migrated to Laserfiche. Until these invoice images are migrated, the document images are accessible in Oracle IPM.
- FS will soon begin transitioning other imaging applications to Laserfiche. Imaging applications with the most campus viewers will be transitioned first.
- For all imaging applications, the focus will be on moving new documents to Laserfiche first. Prior images will still be accessible through Oracle IPM until they are transitioned.

## Summary:

There will be 3 sources for imaged documents temporarily:

1. IPM – all images prior to 7/1/12, internal billings, and FY13 paper invoices received by FS prior to the implementation of Laserfiche. Over time all of these documents will be transitioned to Laserfiche.
2. CrimsonCorner – all Payment Request Form attachments, match exception invoices prior to implementation of Laserfiche, and electronic invoices received direct from suppliers.
3. Laserfiche – all invoices since implementation of Laserfiche.