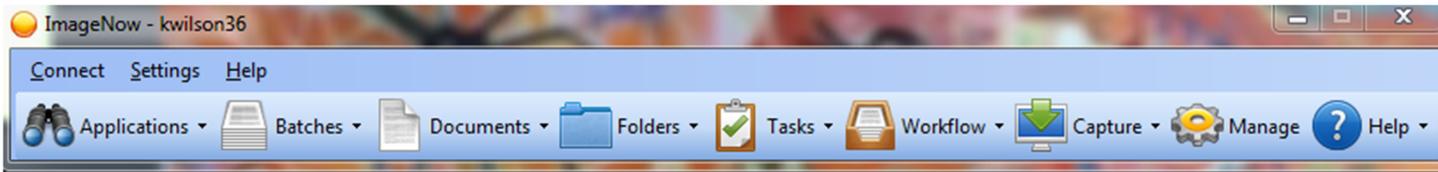


CPSM IMAGE NOW – BUDGET AMENDMENT TRAINING

Page 2	Setting Up a Capture Profile for Entering a Budget Amendment
Page 3	Setting Up a Capture Profile for Modifying or Appending an Existing Budget Amendment
Page 5 - 8	How to Enter a Budget Amendment into Image Now
Page 9 – 10	How to Modify of Append an Existing Budget Amendment
Page 11 - 12	Use of Sticky Notes for Communication
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Page 16	How to Get Additional Assistance!

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 – CPSM" 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.

A screenshot of the 'BA - CPSM' capture profile configuration window, showing the 'General' tab. The window has three tabs: 'General', 'Single', and 'Document Keys'. The 'General' tab is active. The 'Name' field contains 'BA - CPSM'. The 'Description' field is empty. The 'Type' section has 'Source' set to 'ImageNow Printer', 'Mode' set to 'Single', and 'Send To' set to 'BA CPSM Approval Start'. There are checkboxes for 'Set as the default Printer profile' and 'Submit documents to Content Server', both of which are unchecked.A screenshot of the 'BA - CPSM' capture profile configuration window, showing the 'Document Keys' tab. The window has three tabs: 'General', 'Single', and 'Document Keys'. The 'Document Keys' tab is active. The text 'Set the document location and keys.' is displayed. There is a checkbox for 'Save document to a folder.' which is unchecked. Below this is a table with three columns: 'Document Key', 'Type', and 'Value'.

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		

BA - CPSM To create and manage your capture profiles. [X]

General Single Document Keys

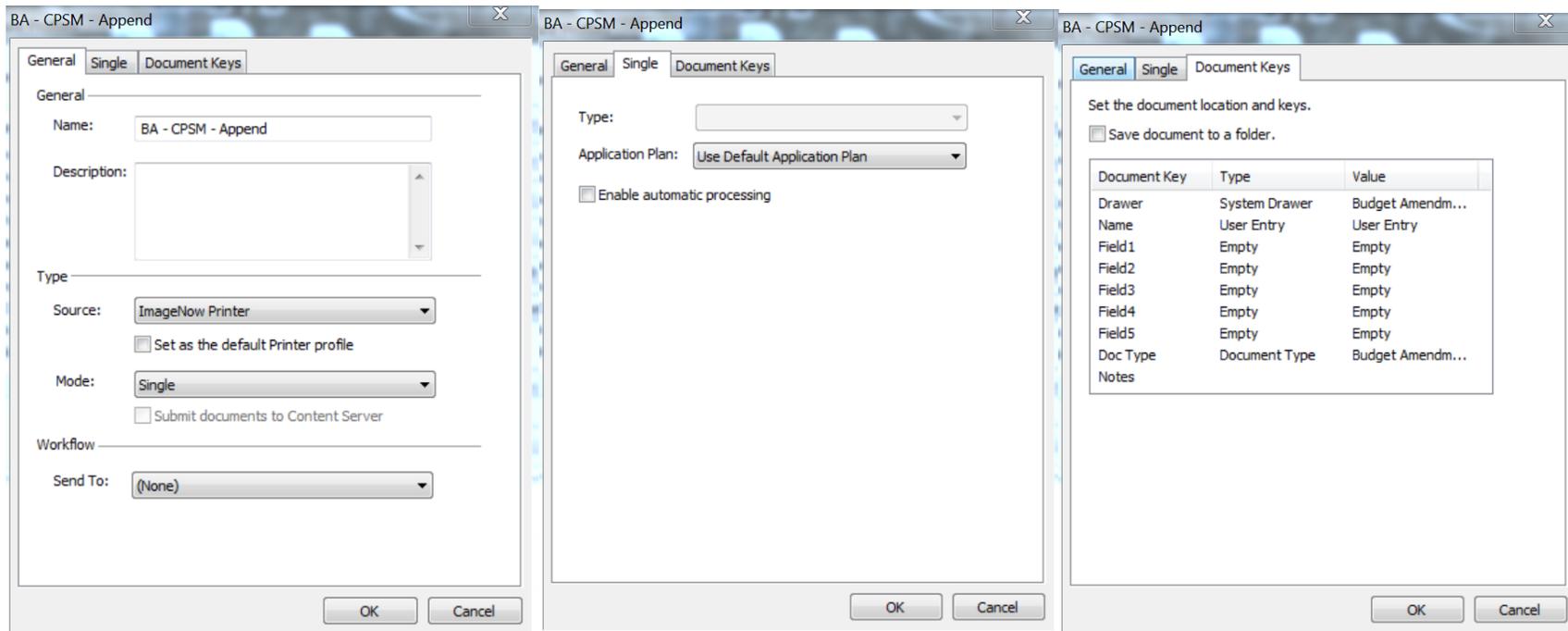
Type: []

Application Plan: Budget Amendments - CPSM []

Enable automatic processing

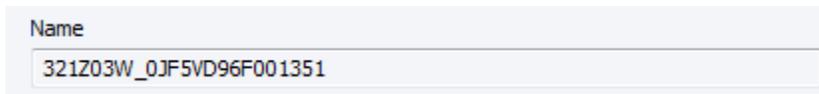
Create a Capture Profile “BA – CPSM – Append” for appending pages to the Budget Amendment Process with the following properties:

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”
- Doc Type should be “Budget Amendments – CPSM”



How to Append

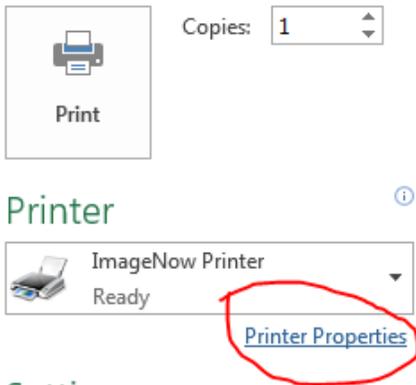
1. Open the existing document to be appended to, and copy its name:
2. Close the document.
3. Open the document you want to append. Print it to ImageNow printer, and at the **ImageNow Print** prompt, select the profile “BA- CPSM - Append”
4. At the next prompt for **Proposed Keys**, paste the document 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. Close the document. At the prompt asking if you want to save the scanned image, click “Yes”
7. At the prompt “A document with the specified name and location already exists . . .” click OK.
8. Open the original document. You will find the new page(s) appended to the end of it.

How to ImageNow print a Budget Amendment

Always open IMAGE NOW as a first step.

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

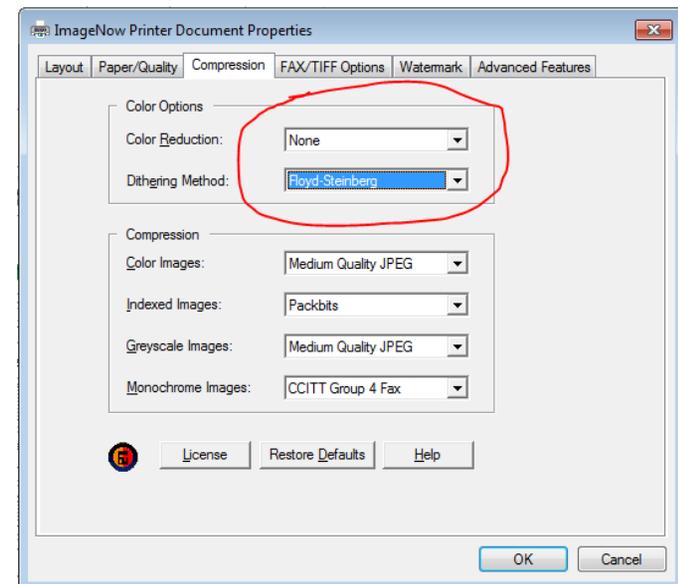


Settings

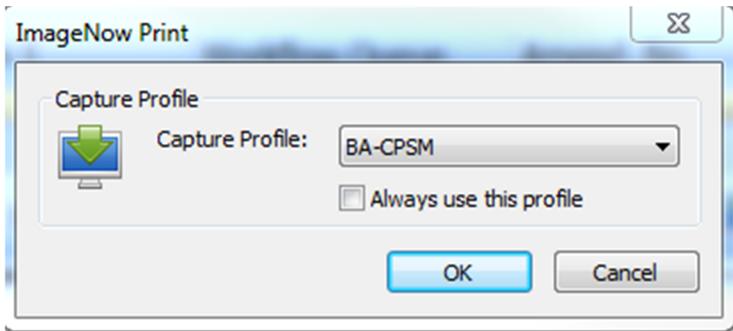
Go to Properties, then select Compression Tab, Change Color Reduction to “None” and Dithering to “Floyd-Steinberg”

Click OK

Print ONLY Page 1



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



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

Notes:

Project Number#: Facilities AIM Project # (0268-2017) or CPSM Project #

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.

Project Title: Name of the project – e.g. Campus Sector Plan for West Campus

Proposed Keys

Location _____

Drawer
Budget Amendments

Name:
<<Unique ID>>

Document Keys _____

Proj. #:

Amendment #:

Amount Requested:

Amnd Ttl Proj Budget:

Project Title:

Document Type:
Budget Amendments - CPSM

Notes:

Capture Cancel

Proposed Keys

Location _____

Drawer
Budget Amendments

Name:
<<Unique ID>>

Document Keys _____

Proj. #:
0168-2017

Amendment #:
1

Amount Requested:
1,000,000

Amnd Ttl Proj Budget:
5,000,000

Project Title:
Kim's Test

Document Type:
Budget Amendments - CPSM

Notes:
|

Capture Cancel

Fill out the **Project Manager** (Select PM Name) and **Design or Construction Review Fields** (Select CPSM). Also put the amount of funds that you are requesting in the **Amount 1** Field.

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: Kim Wilson
 Title: Director of CAP Projects Campus Services

Date: 10.24.16

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

Project Title: West Campus Dining Commons

Project Manager(s): Kim Wilson

PeopleSoft Project Number: _____

Facilities (AIM) Project Number: 0268-2015

Project Start & End Dates: Complete by August 2017 *Please attach estimated cash flow by fiscal yr for multi yr projects*

Click on line to place Approval stamp

Properties

Application Plan
 Select an application plan:
 Budget Amendments - CPSM

Document Keys

Drawer
 Budget Amendments

Name
 321214L_0Y8Q4E597000W8M

Proj. #
 0168-2017

Amendment #
 1

Amount Requested
 1,000,000

Amnd Trl Proj Budget
 5,000,000

Project Title
 Kim's Test

Document Type
 Budget Amendments - CPSM

Custom Properties

Design or Construction Revw?	CPSM
Manager 1	Linda Daniels
Amount 1	1,000,000
Amount 2 (optional)	
Amount 3 (optional)	
Amount 4 (optional)	
Amount 5 (optional)	
PSoft Account 1	

Custom Properties

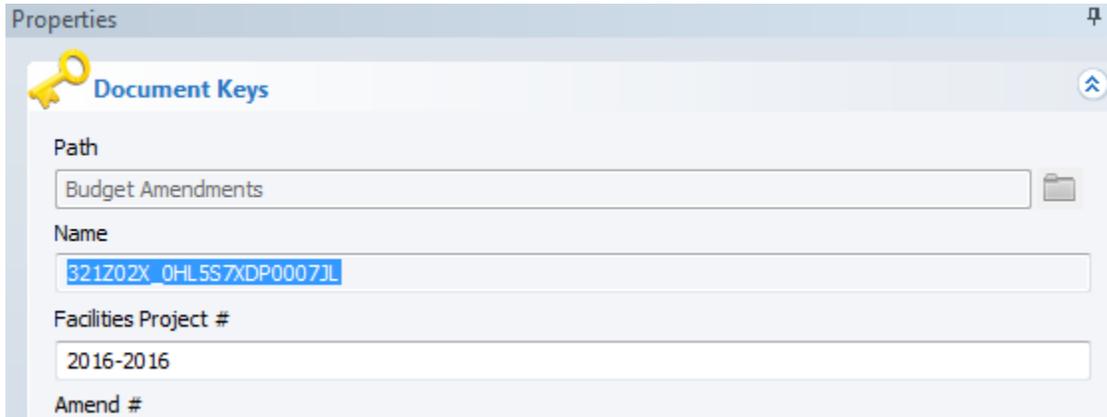
Design or Construction Revw?	CPSM
Manager 1	Amanda Jones
Amount 1	\$ 1,000,000.00
Amount 2 (optional)	
Amount 3 (optional)	

After completing all Index fields, and the two required Custom Properties, the document will automatically route forward to the CPSM AVP for approval.

Append to a Budget Amendment

Always open IMAGE NOW as a first step.

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

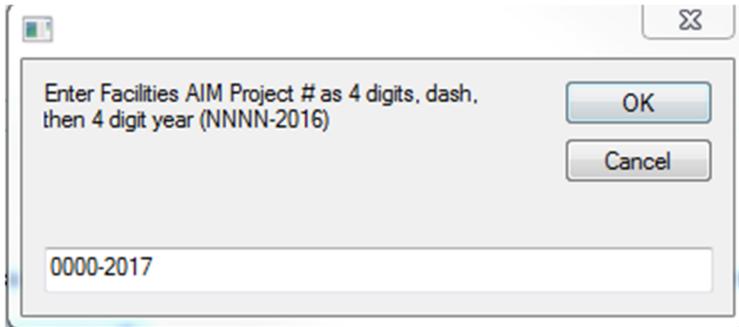


The screenshot shows a 'Properties' dialog box with a 'Document Keys' section. The 'Path' field contains 'Budget Amendments'. The 'Name' field contains '321Z02X_0HL5S7XDP0007JL'. The 'Facilities Project #' field contains '2016-2016'. The 'Amend #' field is empty.

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

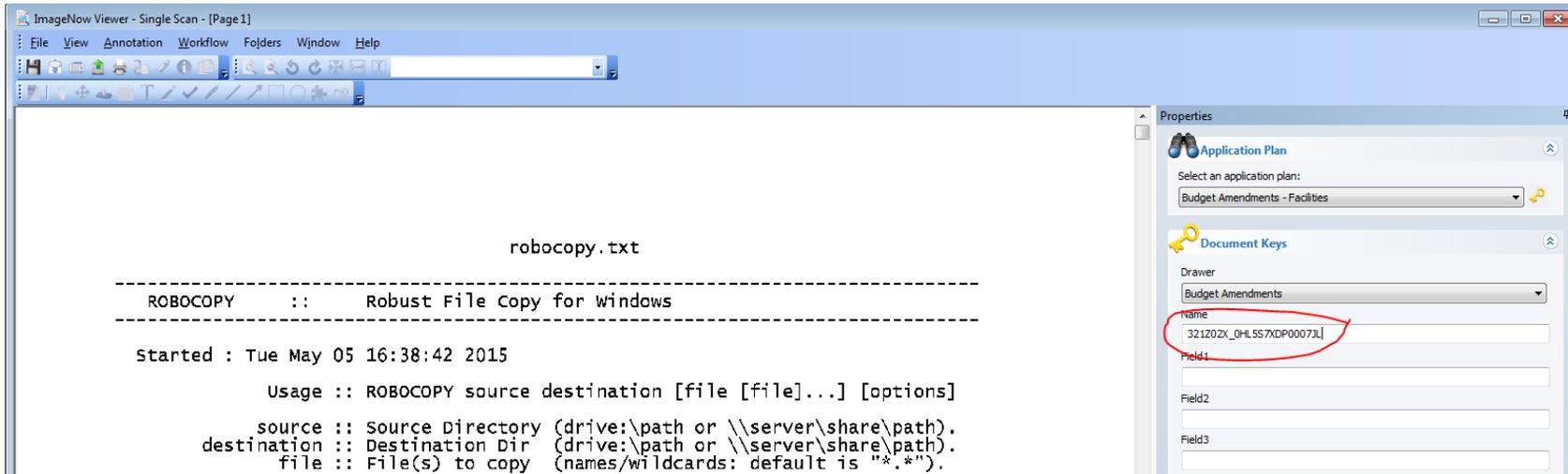
You will be prompted for the Project Number. If you do not have a project number, use 0000-YEAR (0000-2017).

CLICK OK



The screenshot shows a dialog box with the text: 'Enter Facilities AIM Project # as 4 digits, dash, then 4 digit year (NNNN-2016)'. Below the text is a text input field containing '0000-2017'. There are 'OK' and 'Cancel' buttons.

Paste the Name into the empty Name index field.



Fill out the **Project Manager** (Select PM Name) and **Design or Construction Review Fields** (Select CPSM). Also put the amount of funds that you are requesting in the **Amount 1** Field.

Design or Construction Revw?	CPSM
Manager 1	Amanda Jones
Amount 1	\$ 1,000,000.00
Amount 2 (optional)	
Amount 3 (optional)	

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.

Note that you can drag and drop the pages within the document.

USING STICKY NOTES FOR COMMUNICATION

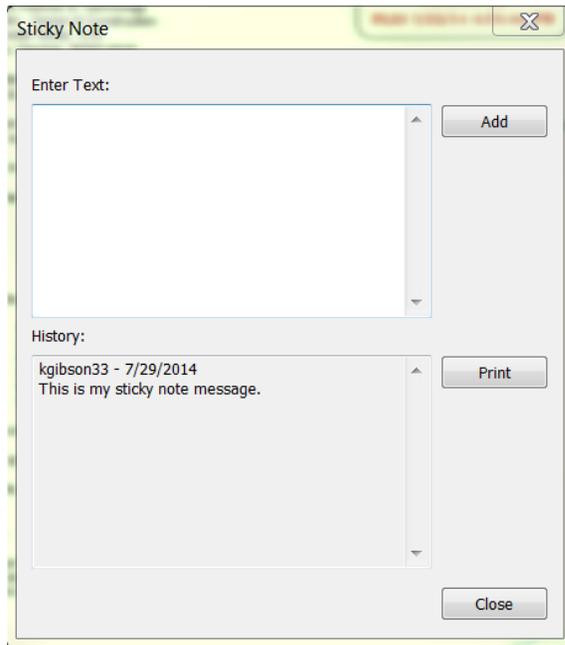
How do I add or respond to a sticky note annotation?

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.

A screenshot of a 'Sticky Note' dialog box. The dialog box has a title bar with the text 'Sticky Note' and a close button (X). Inside the dialog box, there are two main sections. The top section is labeled 'Enter Text:' and contains a text input field with the text 'This is my sticky note message.' and an 'Add' button to its right. The bottom section is labeled 'History:' and contains an empty text area and a 'Print' button to its right. At the bottom center of the dialog box is a 'Close' button.

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.



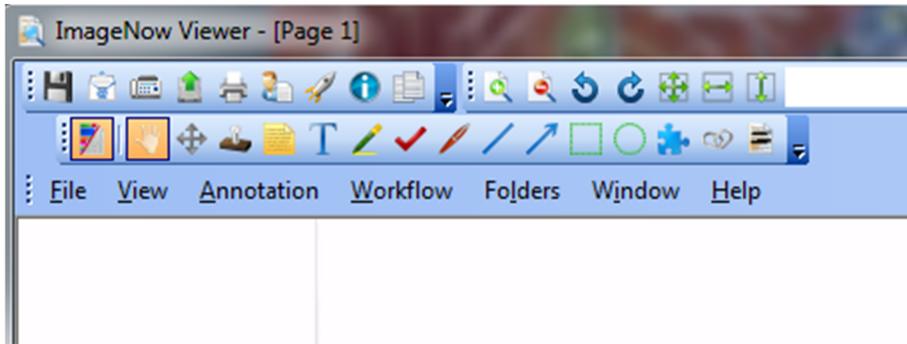
5. Click Close. The sticky note will save when you Save and Close the contract.

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

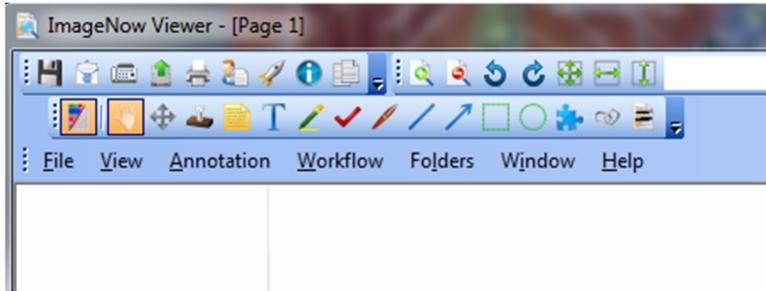
1. Double click on the sticky note to open it.
2. Follow steps 3-5 above.

HOW TO MOVE A DOCUMENT BACK OR FORWARD IN THE WORKFLOW

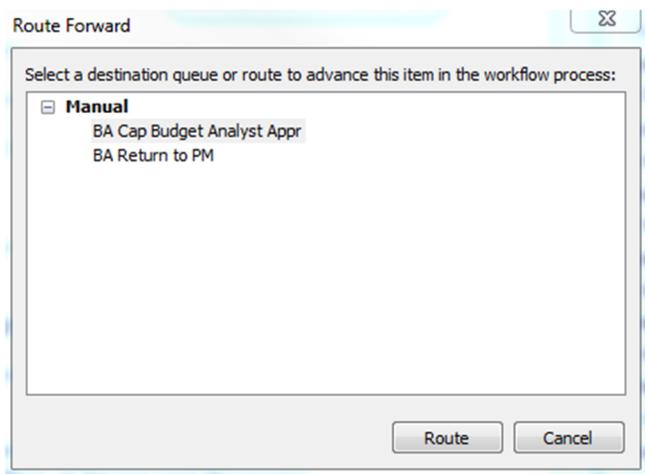
Open the Document. Click on WORKFLOW, at the top of the Document



Click on Work Flow again, and then select EITHER Route Forward or Route Backward from the pull down menu.



Options for moving the document forward or backwards in the workflow will Appear.



VIEW ISSUES:

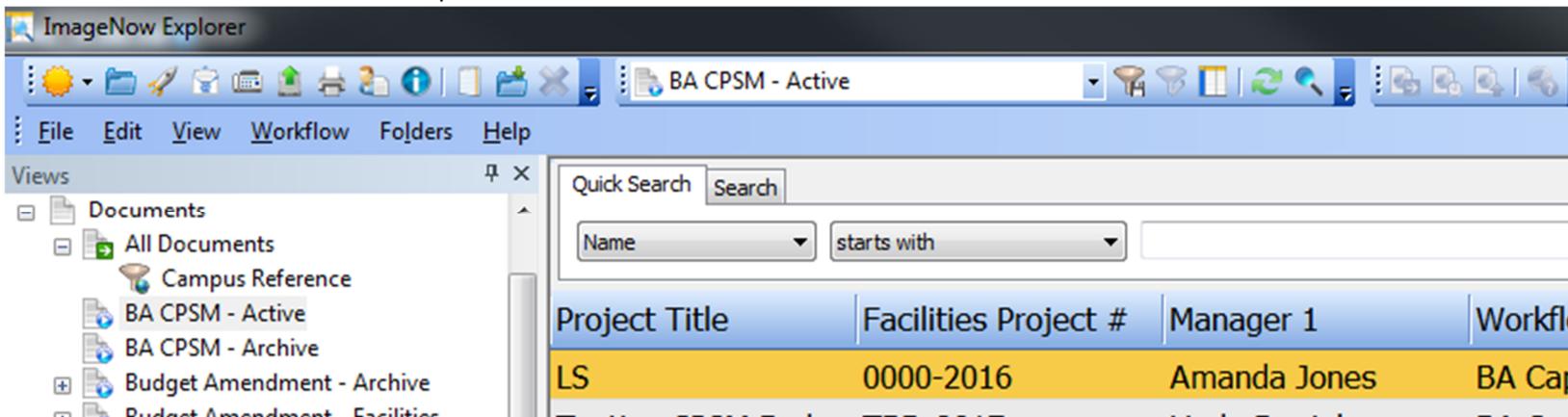
If the Properties and Custom Properties Menus are not visible, hit **F7**

If the Documents Viewer (THUMBNAILS) is not visible Hit **F9**

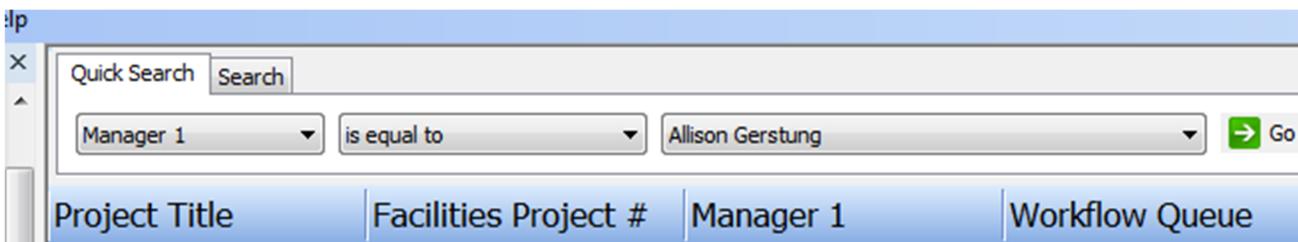
USING FILTERS

You can create saved views of your documents by sort criteria. In the example below, a view is created of Budget Amendments by Project Manager.

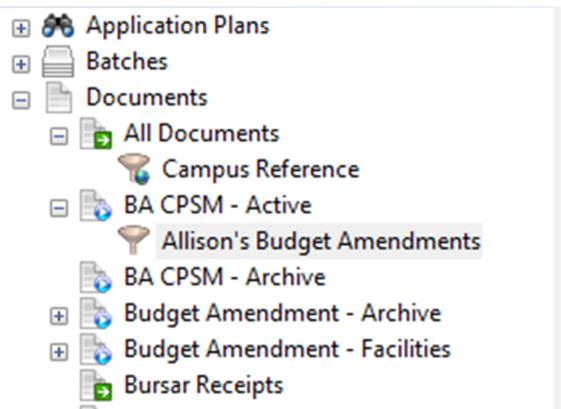
1. Click on Documents on the Image Now Bar. Open the folder of documents where you would like to set up a filter.
2. Go to the QUICK SEARCH bar at the top of the documents list.



3. Click on the Name pull down menu and go to Custom Property.
4. Choose Manager 1
5. Pick the name of the Manager from the pull down menu.



6. Click on the FILTER button (Funnel with a Save Disk)
7. Name the Filer
8. Click OK.
9. The Filter will now be visible.



QUEUE DECODER RING

BA Approval Start	Start Queue - This is the start of the workflow – Where the document starts when it is first put into Image Now
BA Return to PM	Queue for Documents that are returned to the PM with issues.
BA Cap Budget Analyst Approval	Scott Mussak, Budget Office
BA Cap Budget Dir Approval	Lisa-Marie Godfrey
BA CPSM Dir Approval	Howard Wertheimer
BA Complete	Document is complete with all approvals
BA Delete	Delete Budget Amendment

ADDITIONAL HELP

If you are having training related issues, please call Kim Wilson. 404-771-6439

If you are having technology issues, please first call your in house IT department. If Image Now technology issues can not be resolved by that team, reach out the Business Services team that manages Image Now (in the order below):

- 1) marissa.handley@business.gatech.edu
- 2) whitney.tate@business.gatech.edu