

Searching for Documents in OMNI

Imaged documents can be viewed using the following navigations:

TO VIEW	NAVIGATE TO
Purchase Orders, Change Orders and related Invoices	Purchasing > Purchase Orders > Review PO Information > Purchase Orders
	Purchasing > Purchase Orders > Review PO Information > Activity Summary
	Accounts Payable > FSU AP Custom > FSU Document Management
Paid Encumbered and Unencumbered Invoices	Accounts Payable > Vouchers > Add/Update > Regular Entry
Travel Documents <small>to view or modify expense reports</small>	Travel and Expense Center on Modify and View screens, whether in process or complete
Travel Documents <small>to approve expense reports</small>	Travel and Expense Center > Approve Transaction on Approval screens

To search for an invoice go to: OMNI > Financials 9.1 > Main Menu > Accounts Payable > FSU AP Custom > FSU Document Management

Enter the desired search criteria.
Entering more data will narrow the search results.

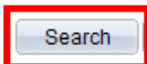
To search by multiple statuses:

- Change the Invoice Status drop down to "IN"
- Hold down the CTRL key and click on each desired status.

For search fields without a drop down box, several items can be searched at once by separating the data with commas:

PO Number: in 0000701224,0000600998,0000719202

Click



FSU Document Management

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300):

Business Unit: begins with

Document ID: begins with

PO Number: begins with

Invoice Number: begins with

Voucher ID: begins with

Processor: begins with

Invoice Status: = ▼

Invoice Date: = ▼

Vendor ID: begins with

Short Vendor Name: begins with

Department: begins with

Image Date: = ▼

Case Sensitive

[Basic Search](#)

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The search results are:

Find an Existing Value

Maximum number of rows to return (up to 300):

Business Unit: begins with

Document ID: begins with

PO Number: begins with

Invoice Number: begins with

Voucher ID: begins with

Processor: begins with

Invoice Status: in

Complete
Credit
 Delete
 Hold
 HoldR
 NEW
 NewE
 NewR
 PCARD
 Refund

Invoice Date: =

Vendor ID: begins with

Short Vendor Name: begins with

Department: begins with

Image Date: =

Case Sensitive

[Basic Search](#)

Search Results

View All First 1-5 of 5 Last

Business Unit	Document ID	Document Type	PO Number	Processor	Invoice Number	Invoice Status	Invoice Date	Voucher ID	Vendor ID	Short Vendor Name	Department	Image Date
FSU01	000000000054	INV_ENCUM	0000707217	APE002	8354	NEW	11/14/2011	(blank)	0000002217	ARAMARK-001	230004	12/14/2011
FSU01	000000000059	INV_ENCUM	0000710741	APE002	03	NEW	09/26/2011	(blank)	0000043954	ELLIOMCCAS-001	098002	12/14/2011
FSU01	000000000062	INV_ENCUM	0000700013	APE002	011068-11/11/11	NEW	11/11/2011	(blank)	0000020412	JILLRICKIE	006016	12/14/2011
FSU01	000000000068	INV_ENCUM	0000707217	APE002	8354	NEW	11/11/2011	(blank)	0000002217	ARAMARK-001	230004	12/16/2011
FSU01	000000000090	INV_ENCUM	0000710741	APE002	03	NEW	09/26/2011	(blank)	0000043954	ELLIOMCCAS-001	098002	12/16/2011

Each of the columns can be sorted by ascending or descending order by clicking on the column header. Click any hyperlink for the document to be viewed:

Search Results

View All First 1-5 of 5 Last

Business Unit	Document ID	Document Type	PO Number	Processor	Invoice Number	Invoice Status	Invoice Date	Voucher ID	Vendor ID	Short Vendor Name	Department	Image Date
FSU01	000000000054	INV_ENCUM	0000707217	APE002	8354	NEW	11/14/2011	(blank)	0000002217	ARAMARK-001	230004	12/14/2011
FSU01	000000000059	INV_ENCUM	0000710741	APE002	03	NEW	09/26/2011	(blank)	0000043954	ELLIOMCCAS-001	098002	12/14/2011
FSU01	000000000062	INV_ENCUM	0000700013	APE002	011068-11/11/11	NEW	11/11/2011	(blank)	0000020412	JILLRICKIE	006016	12/14/2011
FSU01	000000000068	INV_ENCUM	0000707217	APE002	8354	NEW	11/11/2011	(blank)	0000002217	ARAMARK-001	230004	12/16/2011
FSU01	000000000090	INV_ENCUM	0000710741	APE002	03	NEW	09/26/2011	(blank)	0000043954	ELLIOMCCAS-001	098002	12/16/2011

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When a document is selected, the Manage Invoice Document screen will appear. This screen is similar to the invoice data screen used in Hummingbird DM and displays all data related to the invoice, a list of and access to related documents, email notification details and access to the history/comments of the invoice:

Manage Invoice Document

Document ID: 000000000051 Seq No: 1
Scan Date: 12/14/2011 ImagingSolution Document ID: 1415736
Doc Type: INV_ENCUM

Invoice Status: **NEW** Processor: **APE003**

Department: 234003 Campus Compact-Coll Volunteer
Invoice no.: 194915 Vendor ID: 0000043709 FIELDPRINT-001
Invoice Amt: 2071.500
Invoice Date: 10/31/2011
PO Number: 0000710578 Loaded on: 12/20/11 2:05PM
Voucher ID Last Updated: 12/20/11 2:05:22PM By: FSU_BATCH

[View History/Add Comments](#)

Email Tracker

Email 1	<input type="text"/>	Email Dt 1	<input type="text"/>
Email 2	<input type="text"/>	Email Dt 2	<input type="text"/>
Email 3	<input type="text"/>	Email Dt 3	<input type="text"/>

Save Return to Search Previous in List Next in List Notify

To view Purchase Orders, Change Orders, and Invoices related to this document.

To view comments by the invoice processor and the history of the document.

See the list on the next page for Status definitions.

Searching for Documents in OMNI

The new invoice statuses follow:

INVOICE STATUS	DESCRIPTION
Complete	Settled invoice. A voucher number is associated with the invoice if the invoice was paid.
Credit	Vendor credit. When Credit is processed, change the document status to Complete; a voucher number should be associated with the credit.
Delete	Invoice hard delete requested. Enter notes under "View History/Add Comments" indicating reason for the deletion, which will be reviewed by Administrators before invoice is removed from the system.
Hold	Replaces "Recycled" status used in Hummingbird. Invoice has been reviewed but requires additional information. Comments under "View History/Add Comments" should indicate why invoice has not been paid.
HoldR	Invoice is on Hold, awaiting a receipt by the department with no other outstanding issues.
NEW	Invoice received but not yet reviewed by the processor.
NewR	New invoice received and unused receipt on Purchase Order in OMNI. **Status created as foundation for future enhancement requests.**
NewE	New invoice received without available receipt in OMNI and email sent to department. **Status created as foundation for future enhancement request.**
PCARD	Invoice being paid on department's Purchasing Card. "View History/Add Comments" should indicate who provided the processor with this information and their contact phone number and email address.
Refund	Status used by Central Accounts Payable and denotes an invoice/ credit memo for which a refund is expected from the vendor. When Refund is received, document status will be changed to Complete.


New Processor codes – **PAY SPECIAL ATTENTION TO THE NEW CODE APE013:**

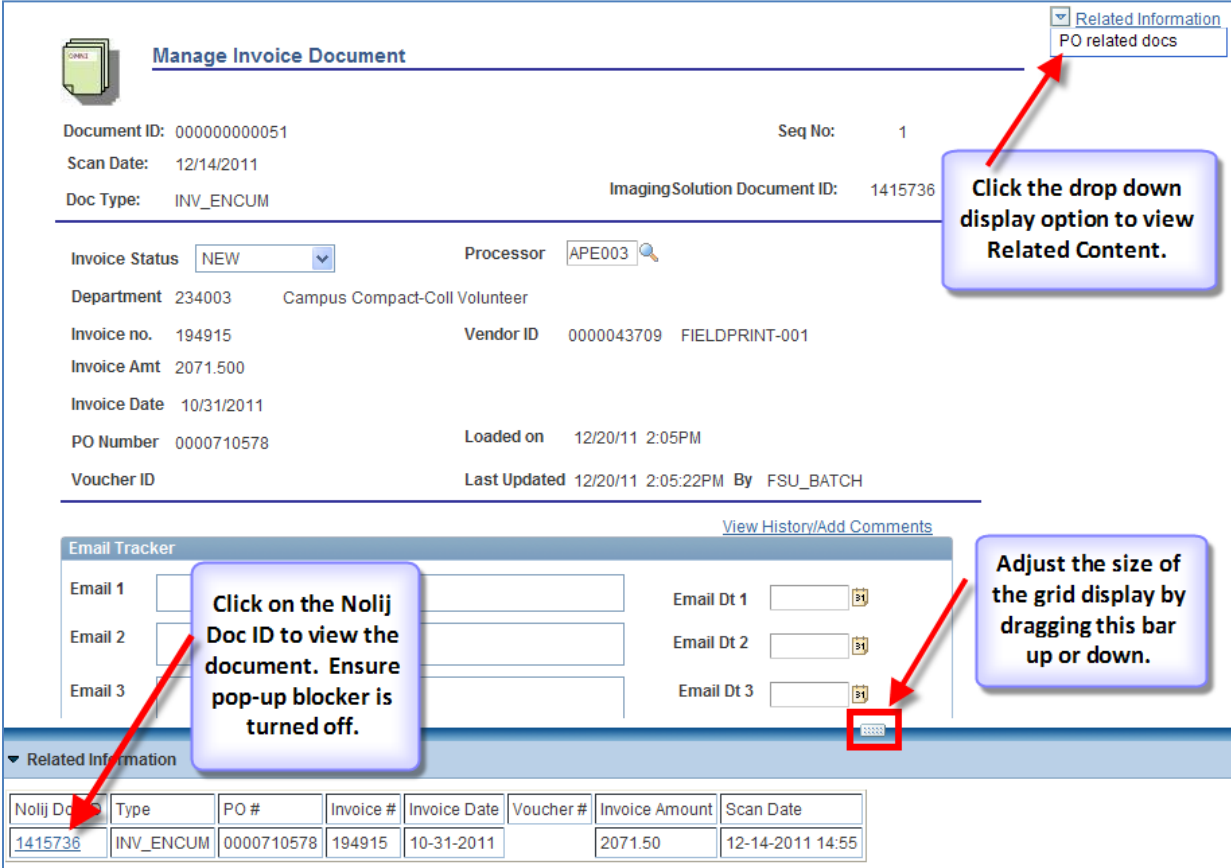
PROCESSOR	DESCRIPTION
APE013	New TROUBLESHOOTING queue. Move any invoices formally sent to APU006 to this queue as well as any invoice that has incorrect data associated with it (PO#, invoice number, etc.). This includes invoice numbers you plan to process a voucher on using a different invoice number. Include a comment as to the reason for the data change.
FND001	Move to this queue when invoices are to be paid through the FSU Foundation.
RF001	Move to this queue when invoices are to be paid through the FSU Research Foundation.

Searching for Documents in OMNI

Related Information

All documents viewable in OMNI will display a [Related Information](#) link amongst the upper right hand hyperlink options. When the link is clicked, a drop down option will display. Click on the display option to reveal related information at the bottom of the screen.

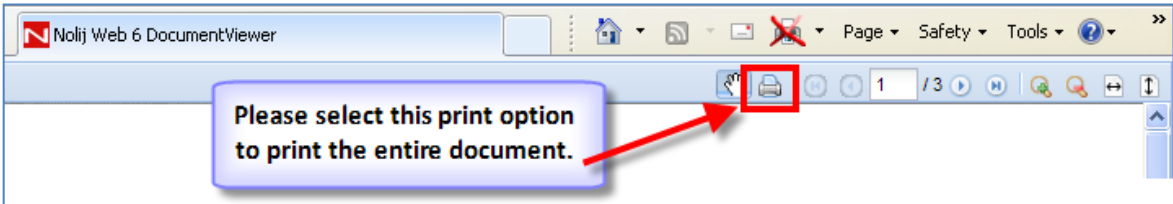
The resulting display details the Purchase Order, Change Order (if relevant) and Invoices received and imaged for the Purchase Order. Once the Nolij Doc ID hyperlink has been clicked, a Nolij Web Document Viewer webpage will pop up with an image of the document. If several documents are assigned to the same Purchase Order number and are indexed separately, the grid will display all the documents with the scan date and timestamp. If new documents are listed, refresh by clicking [PO related docs](#) in the Related Information grid. The Related Information grid can be closed by clicking the red .



The screenshot shows the 'Manage Invoice Document' page. At the top right, there is a 'Related Information' dropdown menu with 'PO related docs' selected. A callout box points to this menu with the text: 'Click the drop down display option to view Related Content.' Below the main document details, there is an 'Email Tracker' section with three email input fields and dates. A callout box points to the first email field with the text: 'Click on the Nolij Doc ID to view the document. Ensure pop-up blocker is turned off.' To the right of the email tracker, there is a vertical bar with a red box around its bottom portion. A callout box points to this bar with the text: 'Adjust the size of the grid display by dragging this bar up or down.' At the bottom, there is a 'Related Information' grid with the following data:

Nolij Doc ID	Type	PO #	Invoice #	Invoice Date	Voucher #	Invoice Amount	Scan Date
1415736	INV_ENCUM	0000710578	194915	10-31-2011		2071.50	12-14-2011 14:55

To print documents, select the viewer print option, not the web screen print option. If the image is compressed, refresh the page to restore.



The screenshot shows the 'Nolij Web 6 DocumentViewer' browser window. The toolbar at the bottom contains several icons. A red box highlights the printer icon, and a callout box points to it with the text: 'Please select this print option to print the entire document.'