

# Searching for Documents in OMNI

Imaged documents can be viewed using the following navigations:

OMNI > Financials 9.1 > Main Menu:

| TO VIEW  | NAVIGATE TO   |
|--|---|
| Purchase Order, Change Orders and related Invoices | Purchasing > Purchase Orders > Review PO Information > Purchase Orders            |
|  | Purchasing > Purchase Orders > Review PO Information > Pactivity Summary          |
|  | Accounts Payable > FSU AP Custom > FSU Document Management                        |
| Paid Encumbered and Unencumbered Invoices          | Accounts Payable > Vouchers > Add/Update > Regular Entry                          |
| Travel Documents to view or modify expense reports | Travel & Expenses > Travel & Expense Center > Expense Report > View               |
|  | Employee Self-Service > Travel & Expense Center > Expense Report > Modify         |
| Travel Documents to approve expense reports        | Manager Self-Service > Travel & Expense Center > approvals > Approve Transactions |

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

## FSU Document Management

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

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

Find an Existing Value

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

Business Unit:

Document ID:

**PO Number:**

**Invoice Number:**

Voucher ID:

Processor:

Invoice Status:

Invoice Date:

Vendor ID:

Short Vendor Name:

Department:

Image Date:

Case Sensitive

[Basic Search](#)

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:**

Click

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The search results are:

Find an Existing Value

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

Business Unit:

Document ID:

PO Number:

Invoice Number:

Voucher ID:

Processor:  APE002

Invoice Status: 

- Complete
- Credit
- Delete
- Hold
- HoldR
- NEW
- NewE
- NewR
- PCARD
- Refund

Invoice Date:

Vendor ID:

Short Vendor Name:

Department:

Image Date:

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

**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 |

# Searching for Documents in OMNI

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"/> |

**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.**

Save    Return to Search    Previous in List    Next in List    Notify

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:**

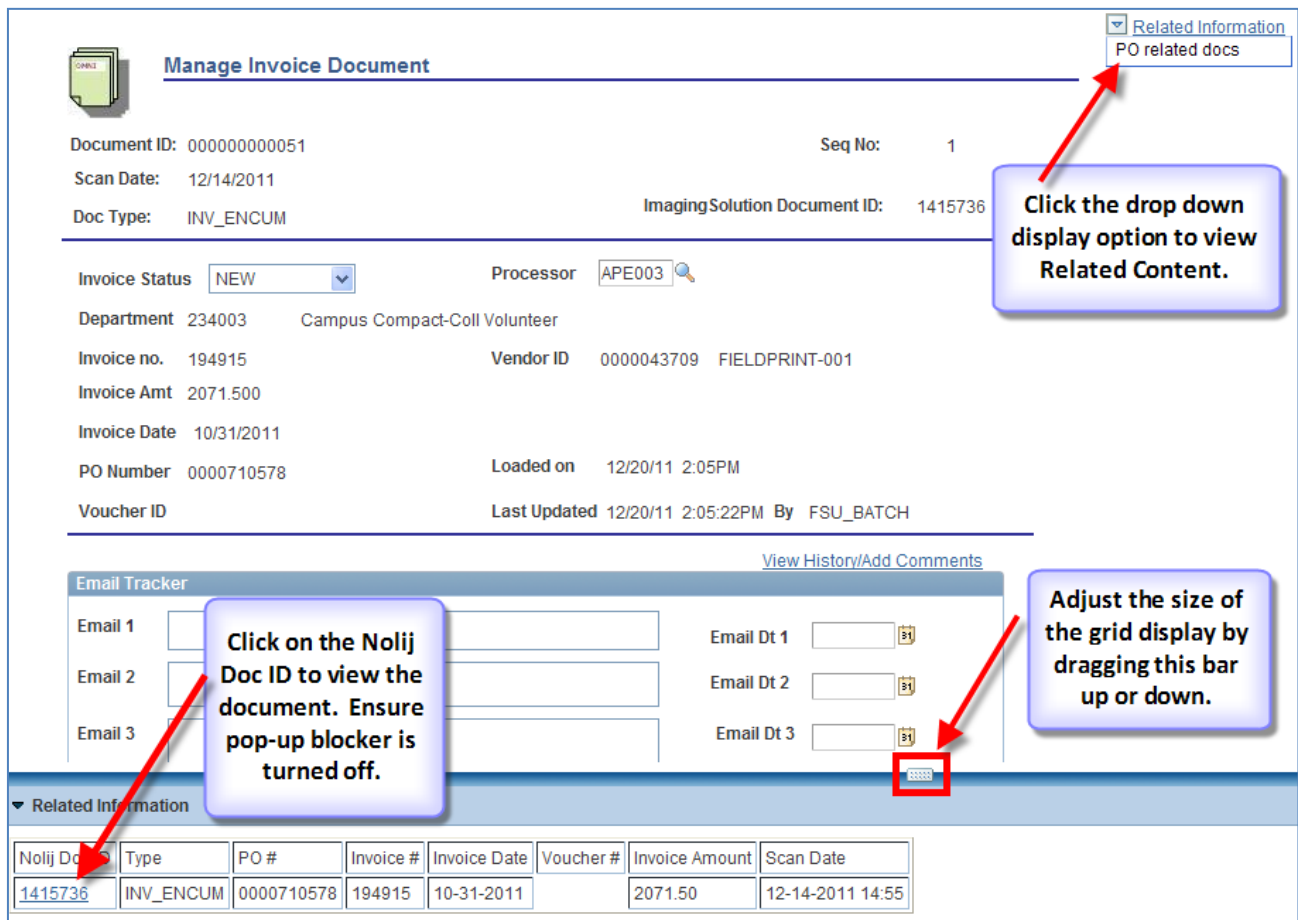
| PROCESSOR | DESCRIPTION  |
|-----------|--|
| APE013    | New TROUBLESHOOTING queue. Move any invoices formally sent to APU006 to this queue as well as any invoice that has incorrect data associated with it (PO#, invoice number, etc.). This includes invoice numbers you plan to process a voucher on 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 .



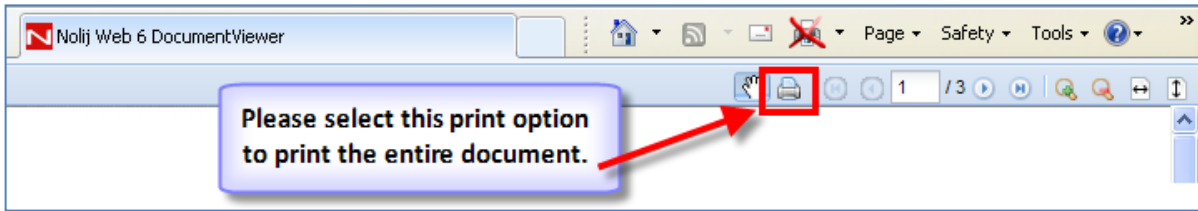
The screenshot shows the 'Manage Invoice Document' interface. At the top right, there is a 'Related Information' dropdown menu with 'PO related docs' selected. A red arrow points to this dropdown with the annotation: 'Click the drop down display option to view Related Content.' Below the main document details, there is an 'Email Tracker' section with three rows for email tracking. A red arrow points to the 'Nolij Doc ID' column in the 'Related Information' grid below, with the annotation: 'Click on the Nolij Doc ID to view the document. Ensure pop-up blocker is turned off.' Another red arrow points to a vertical bar on the right side of the 'Related Information' grid, with the annotation: 'Adjust the size of the grid display by dragging this bar up or down.' The 'Related Information' grid contains the following data:

| Nolij Doc ID            | Type      | PO #       | Invoice # | Invoice Date | Voucher # | Invoice Amount | Scan Date        |
|-------------------------|-----------|------------|-----------|--------------|-----------|----------------|------------------|
| <a href="#">1415736</a> | INV_ENCUM | 0000710578 | 194915    | 10-31-2011   |           | 2071.50        | 12-14-2011 14:55 |

## Searching for Documents in OMNI

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



### Technical Problems

If you have problems viewing Purchase Order documents or accessing the Purchase Order inquiry pages, please submit a CRM ticket (help ticket) to Purchasing.

If you have problems accessing the FSU Document Management screen in OMNI, please submit a CRM ticket (help ticket) to Accounts Payable.

If you have problems viewing or printing Related Information documents in OMNI, please submit a CRM ticket (help ticket) to IT Services, subcategory Imaging.

For all other questions or problems, please email Accounts Payable at [accountspayable@admin.fsu.edu](mailto:accountspayable@admin.fsu.edu).