AP Invoice Imaging
Accessing MarkView for C-Forms

Brackets ([ ]) indicate a button or menu item.

MarkView is the software used to access images. You will be able to enter MarkView by doing any of the following:

1. Click on URL sent via e-mail notification
2. Establish bookmarks and/or shortcuts

**PC and Virtual PC Users:**
PO Working Folder:
http://fuji.isc-seo.upenn.edu/pr01/up_field.cform

**Mac native OS Users:**
PO Working Folder
http://fuji.isc-seo.upenn.edu/pr01/up_field_mac.cform

*Note: different URL’s for PC & Virtual PC vs. Mac Users*

Your browser session will now connect to MarkView:

![MarkView Connection](Connect_to_pudgy.isc-seo.upenn.edu.png)

**Field:**  **Action:**
User name  Enter your MarkView username.
Password  Enter your MarkView password.
Click on [OK].

- Software takes approximately 45 - 60 seconds to load.
- It is recommended that you dedicate one browser session to your MarkView activity.

**C-Form Scanning Process**

- Accounts Payable will perform a quick review.
- Complete forms will be scanned, while incomplete forms will be returned to their originator for appropriate corrections.
- After scanning, if a C-Form still cannot be processed without additional information or additional approval, Accounts Payable will place a ‘Markup’ on the image.
- The invoice is then transitioned to the designated senior business person for that School/Center.
- For a list of all the designated senior business persons who have responsibility for reviewing and resolving ALL rejected C-Forms and invoices that have been imaged for your School/Center, please refer to:

http://www.finance.upenn.edu/comptroller/sbo.shtml
The Working Folder is now displayed; contains ALL C-Forms on hold within a particular School/Center.

Field: Action:
Image Open respective invoice image

1. If item has more than one hold, they all will appear
2. Click on [I] to view the invoice:

Please note: Initial image requested will remain in screen to the right until new image is requested. Viewing ‘details’ on the left for another invoice will not remove current invoice image from the screen.

View Manager

In order to “markup” or resolve the hold, the View Manager must be activated - click on the [ ] on the Standard Toolbar

From the View Manager Pop-Up Window:

• Click on the [ ]
• For end-users, ‘Markups’ are affixed from the TAC Review view

1. To view markups applied in a respective view, the eyeball column must be active
2. To modify a view (affix markup), the padlock must be active AND a check mark must be displayed
3. By activating the **padlock**, your stamps and sticky notes are now available.

4. Important! Be sure to completely analyze the hold situation before determining your next steps.

5. To **Approve** payment of the invoice, click and place the **TAC Authorizer Approved stamp** on a blank portion of the invoice.
   - Left click to place stamp, right click to deactivate.
   - Click **Save** to permanently save mark-ups and transition the C-form back to Accounts Payable.

OR

To **resolve** the hold, click and place the **Holds Resolved Stamp** on a blank portion of the invoice.
   - Left click to place stamp, right to deactivate.
   - Type explanation into **Hold Resolution Sticky Note**.
   - Click **Save** to place the stamp on the invoice image and transition C-form back to Accounts Payable.
# C-Form Hold Resolution Grid

<table>
<thead>
<tr>
<th>C-form Hold Type</th>
<th>To Resolve</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incomplete form</td>
<td>In TAC Authorizer Review view, place <strong>TAC Authorizer Approved Stamp</strong> for missing approvals and signatures; for other missing information, utilize <strong>Holds Resolved stamp</strong> to specify appropriate information</td>
</tr>
<tr>
<td>Incorrect data</td>
<td>In TAC Authorizer Review view, utilize <strong>Holds Resolved stamp</strong> to specify valid information</td>
</tr>
<tr>
<td>Missing Documentation</td>
<td>In TAC Authorizer Review view, utilize <strong>Holds Resolved stamp</strong> to update status of documentation; hard copy of all required documentation should be forwarded to AP</td>
</tr>
</tbody>
</table>

## Invoice Query (PC & Virtual PC Only*)

### PO Manager Responsibility

1. Follow the menu path Invoice>Inquiry

2. Complete the search criteria for the invoice you want to view – PO Number, Supplier Name or Supplier Number, invoice number, etc. - and click **[Find]**

3. From the Invoice Distribution Detail Form click on the paperclip icon  to activate Markview

4. Open the attachment

5. Click **[Show Markview Document]**

### GL Inquiry (Secured)

1. Follow the menu path Inquiry>Account

2. Complete the search criteria and click **[Show Balances]**

3. Select **[Detail Balances]** to search for the budget details

4. Select the line to view and click **[Journal Details]**

5. **[Drilldown]** then **[Show Transaction]**

6. Click on the paperclip icon  to activate Markview

7. Open the attachment

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**BEN Helps**

6 - HELP
(746-4357)

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