Log in

2. Enter your UNCW domain username and password. Click Connect.

Adobe Reader
To open PDF documents, Adobe Reader version 9 or higher must be installed on your computer. Go to http://get.adobe.com/reader/ for a free download of the latest version.

Drawer, Explorer Window, Pane & Viewer
WebNow is comprised of the Drawer, Explorer window, the content search result pane and the document viewer.

Upon logging into WebNow, the Explorer window will automatically display.

From this window, you can search and display documents for a specific drawer. This training document focuses specifically on the Accounts Receivable drawer where all documents related to the university’s Non-Student Accounts Receivable (NSAR) (formerly known as External Billing) are processed and stored.

Toolbar icons can be used to navigate, search and maintain filters. Below is a brief description of the WebNow icons:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Open selected document in the Explorer window</td>
</tr>
<tr>
<td></td>
<td>View properties of selected document in the Explorer window</td>
</tr>
<tr>
<td></td>
<td>Save private filter</td>
</tr>
<tr>
<td></td>
<td>Edit private filter</td>
</tr>
<tr>
<td></td>
<td>Refresh</td>
</tr>
<tr>
<td></td>
<td>Select document columns that display in the Explorer window</td>
</tr>
<tr>
<td></td>
<td>Turn the View pane on or off</td>
</tr>
<tr>
<td></td>
<td>Open the Find toolbar on the Explorer window</td>
</tr>
<tr>
<td></td>
<td>Public Filter</td>
</tr>
<tr>
<td></td>
<td>Private Filter</td>
</tr>
</tbody>
</table>
To select the Accounts Receivable drawer, simply click on the drop down arrow beside the word Documents on the toolbar. Select Accounts Receivable from the drop down list.

The Content Search Result Pane displays all documents that meet specified criteria submitted in a search. The screen snapshot below displays a sampling of documents in the Accounts Receivable drawer. The title bar identifies values (property keys) for this drawer. By default, the Accounts Receivable Result Pane is sorted by the Invoice # value. However, any field can be sorted (ascending or descending) by simply clicking on the value in the title bar.

To open a document, double click the document. The document will display in the WebNow viewer as shown here.

By default, documents are displayed one page at a time. By selecting the Window option on the toolbar, a cascade, tile vertically or tile horizontally view format can be selected.
To navigate between document pages, use the blue navigational arrows at the bottom of each page or click on the thumbnail at the bottom of the page. Thumbnails can be displayed on the viewer by selecting the View option on the toolbar and clicking on Thumbnails.

The first document in the viewer will always be an email. This page is used strictly for electronic transmission of the invoice to the imaging system.

**Searching for Documents**

There are several ways to search for documents in the Accounts Receivable drawer.

Following is an explanation of each:

1. **Go:** Clicking on the Go icon will randomly display 500 documents in the drawer. The search results can be sorted by the field value. The search results will contain documents for all departments.

2. **Quick Search:** The Quick Search option allows you to search by values (property keys). Click on the drop down arrow to view all the values, select the value, enter the specific value you are searching for in the box and click the Go icon or hit the Enter key. **Note:** *The % sign can be used as wildcard in the search value. Also, search values are not case sensitive.*

Example: searching for invoices to all customer names containing the word “Pizza”
3. **Search**: The Search option allows you to create searches with multiple criteria. After clicking on the Search tab, a grid will open that allows you to specify the needed criteria. To begin the search, click on the green plus, select the values needed and click the Go icon or hit the Enter key. **Note:** Multiple criteria can be added to the search by clicking the green plus. To delete search criteria, click on the criteria to highlight it and click on the red delete icon.

4. **Filters**: Filters are used to save and execute frequently requested searches and are displayed on the toolbar directly below the drawer name. To view filters, click on the drop down arrow beside the Accounts Receivable drawer on the toolbar.

![Filter Example](image)

There are two types of filters to help facilitate the retrieval of documents, public and private.

**Public filters** are established at a system administrator level and can be used by anyone that has access to the drawer. You cannot modify a public filter. With the exception of the Dept Search filter, all public filters shown above will return documents for all departments. For example, if you search for documents for Firehouse Subs, the system will return documents for Firehouse Subs for all campus departments that have used this customer.

**Private filters** are personalized filters that you create under your user login that are available for your private use. Using private filters, you can create searches that are unique to your departmental needs. For example, you can create a private filter that will allow you to search for documents for Firehouse Subs for your department only. See the Private Filters section of this document for instructions on creating your own private filters.

**Workflow**

Workflows are used to move NSAR documents through the invoicing process. You can determine the status of your invoice by looking at the Workflow Queue column on the Explorer window.
Following are the NSAR workflow queues and a description of work performed in each:

<table>
<thead>
<tr>
<th>QUEUE NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXTERNAL INVOICE RECEIVING</td>
<td>Invoice has been received by the Billing department but processing has not yet begun</td>
</tr>
<tr>
<td>AP CUSTOMER SETUP</td>
<td>Invoice requires a new customer set up in Banner by the Accounts Payable department</td>
</tr>
<tr>
<td>ACCT CUSTOMER SETUP</td>
<td>Invoice customer has been setup in FTMVEND by AP and needs to be setup in Banner Non-Student by the Billing department</td>
</tr>
<tr>
<td>BANNER ENTRY</td>
<td>The invoice is ready to be entered into Banner Non-Student by the Billing department</td>
</tr>
<tr>
<td>PROCESS INVOICE</td>
<td>The invoice has been entered in Banner Non-Student and the Banner assigned invoice number &amp; new Banner customer number (if applicable) will be added to the invoice in this queue. The invoice will also be signed and any corrections made if necessary.</td>
</tr>
<tr>
<td>BILLING MANAGER</td>
<td>The invoice is in this queue awaiting final approval.</td>
</tr>
<tr>
<td>COMPLETED INVOICE</td>
<td>The invoice is final and will be emailed to the customer and to the issuing department from this queue.</td>
</tr>
<tr>
<td>NOT YET PAID</td>
<td>The invoice has already been sent out &amp; is awaiting payment.</td>
</tr>
<tr>
<td>PAID, WRITTEN OFF or VOID INVOICES</td>
<td>The invoice has been paid, written off or voided and stays in this area for the 3 year record retention period.</td>
</tr>
<tr>
<td>NS COLLECTIONS</td>
<td>The invoice is in the collection process.</td>
</tr>
</tbody>
</table>

**Private Filters**

As discussed earlier, you can create private filters to individualize and facilitate the search of invoice documents. Following are instructions for creating several private filters that will be helpful with retrieving your department’s invoices:

**My Department Search** – Displays invoices for your department.

1. Click on the Accounts Receivable drawer name on the toolbar.
2. Click on the Search Tab below the icon toolbar. The Search box will open.
3. Click on the green plus sign . The Add Condition window will open.
4. Select the following values from the drop down lists.
5. Click OK.
6. Click Go to test the query. Results will display in the Explorer view.

   Example: Department Value = Biology displays Biology invoices only.

7. Click the Save Filter icon on the icon toolbar.
8. The Save Filter window will open. Enter a name and description for the filter. Click OK.

9. The filter appears in the drop down list under Documents on the toolbar.

**My Department & Customer Search** – Displays invoices for a specific customer used by your department.

1. Click on the Accounts Receivable drawer name on the toolbar.

2. Click on the Search Tab below the icon toolbar. The Search box will open.

3. Click on the green plus sign. The Add Condition window will open.
4. Select the following values from the drop down lists

5. Click OK.
6. Click on the green plus sign again. The Add Condition window will open.
7. Select the following values from the drop down lists

![Add Condition dialog box]

8. Click OK.

9. Click **Go** to test the query.

10. The Prompt window will open. Enter the customer name in the prompt box.

![Select a Search Value dialog box]

11. Results will display in the Explorer view.

![Workflow Queue and Issuing Dept table]

12. Click the Save Filter icon on the toolbar.

13. The Save Filter window will open. Enter a name and description for the filter. Click OK.

![Save Filter dialog box]

14. The filter will now appear in the drop down list with other filters.

**My Department & Date Range Search** – Displays invoices for your department that have an invoice date between two specified dates.

1. Click on the Accounts Receivable drawer name on the toolbar.

![Accounts Receivable drawer](image)

2. Click on the Search Tab below the icon toolbar. The Search box will open.
3. Click on the green plus sign +. The Add Condition window will open.
4. Select the following values from the drop down lists:

![Add Condition Window]

5. Click OK.

6. Click on the green plus sign + again. The Add Condition window will open.
7. Select the following values from the drop down lists:

![Add Condition Window]

8. Click OK.

9. Click to test the query.

10. The Prompt window will open. Enter the date range in the prompt box.

![Prompt Window]

11. Results will display in the Explorer view.

![Explorer View]

12. Click the Save Filter icon on the toolbar.
13. The Save Filter window will open. Enter a name and description for the filter. Click OK.
14. The filter will now appear in the drop down list with other filters.

My Department, Date Range & Paid Search – Displays invoices for your department that have an invoice date between two specified dates and that have been paid.

1. Click on the Accounts Receivable drawer name on the toolbar.

2. Click on the Search Tab below the icon toolbar. The Search box will open.

3. Click on the green plus sign. The Add Condition window will open.

4. Select the following values from the drop down lists.

5. Click OK.

6. Click on the green plus sign again. The Add Condition window will open.

7. Select the following values from the drop down lists.
8. Click OK.

9. Click on the green plus sign again. The Add Condition window will open.

10. Select the following values from the drop down lists.

11. Click OK.

12. Click to test the query.

13. The Prompt window will open. Enter the date range in the prompt box.

14. Results will display in the Explorer view.

15. Click the Save Filter icon on the toolbar.

16. The Save Filter window will open. Enter a name and description for the filter. Click OK.

17. The filter will now appear in the drop down list with other filters.
My Department & Invoice # Search – Displays invoices for a specific customer used by your department.

1. Click on the Accounts Receivable drawer name on the toolbar.

2. Click on the Search Tab below the icon toolbar. The Search box will open.

3. Click on the green plus sign. The Add Condition window will open.
4. Select the following values from the drop down lists

5. Click OK.
6. Click on the green plus sign again. The Add Condition window will open.
7. Select the following values from the drop down lists

8. Click OK.
9. Click Go to test the query.
10. The Prompt window will open. Enter the invoice number in the prompt box.

11. Results will show in the Explorer view.

12. Click the Save Filter icon on the toolbar.
13. The Save Filter window will open. Enter a name and description for the filter. Click OK.

14. The filter will now appear in the drop down list with other filters.