Where Did the Paper Go?
Scanning and Workflow

Wendell Vest, Associate Controller
Leisa Shelor, Payroll Manager
Stacy King, General Accounting Manager
Agenda

• Benefits of Workflow & Imaging
• Products used for Workflow & Imaging
• VT Accounts Payable Processes
  • Purchase Orders
  • Invoices
  • Travel Reimbursements
• VT Payroll Process
• VT Journal Voucher Process
• Workflow Edits and Validations
• Reporting
• Challenges
Benefits of Workflow & Imaging

- More efficient than routing paper documents to users
- Can view status of document at anytime in the system - documents are (almost) never lost
- Easy to retrieve on-line for viewing after processed
- Eliminates facilities needed for paper document storage
- Allows edits and validations while documents are processed and routed
Products Used for Workflow & Imaging

- SciQuest – Hosted solution for purchase orders and e-invoicing
- Banner ERP system
- Banner Workflow
- Banner Imaging (BDMS)
- Banner Travel & Expense System (TEM)
VT Accounts Payable Processes
## Significant Events in Accounts Payable

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tr>
<td>Dec 2006</td>
<td>Fully Implemented SciQuest – Electronic approvals with workflow routing, ability to attach images for Purchase Orders</td>
</tr>
<tr>
<td>Jun 2007</td>
<td>Implemented imaging of paper invoices on the back end of Accounts Payable process (excluded travel reimbursement documents) – Nolij System</td>
</tr>
<tr>
<td>Feb 2009</td>
<td>Implemented new eInvoice integration between SciQuest and Banner - no paper invoices received from vendor-only electronic data stored in SciQuest e-invoice form</td>
</tr>
<tr>
<td>May 2010</td>
<td>Implemented imaging and workflow in the Accounts Payable area on the front end (included Travel documents) – BDMS and Banner Workflow</td>
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<tr>
<td>Apr 2012</td>
<td>Implemented pilot Banner Travel &amp; Expense System with departmental workflow for approvals and departments attaching images in the system</td>
</tr>
<tr>
<td>Nov 2012</td>
<td>Procurement department began imaging W-9 and attaching to vendor record in Banner using BDMS</td>
</tr>
<tr>
<td>Jan 2013</td>
<td>Able to accept invoice imaged file (such as pdf) and load into Accounts Payable imaging system for routing in workflow for Accounts Payable auditing</td>
</tr>
</tbody>
</table>
SciQuest-Purchase Orders & e-Invoices

- Hosted system – do you want a 3rd party maintaining and owning your images?

- Used for supporting documents on Purchase Orders – internal and external attachments for POs

- No invoice images maintained in this system as the official supporting documentation

- For e-Invoices, only the data transmitted by vendor is stored on SciQuest electronic invoice form – all of this information interfaces to Banner invoice form
SciQuest Workflow - Purchase Orders

- Allows various workflow approvals
  - Routes to Procurement Department if delegated authority exceed
  - Environmental Health & Safety approvals for selected products or account codes
  - Sponsored program approvals for selected funds and account codes
  - Cost Accounting review for internal purchases from selected service centers that charge sponsored programs
  - Cost Accounting review federal equipment purchases
  - Selected internal service centers approve request prior to departmental approval
SciQuest Workflow Example

Submitted
Daniel Capelluto
On behalf of: Katherine Akers
2/19/2013 5:40 PM

Budget Auth
Approved ✓
✓ System

PI Approval
Approved ✓
✓ Daniel Capelluto

Org Approval 1
Approved ✓
✓ E.F. Benfield

Create PO
Approved ✓

Completed
2/20/2013 9:44 AM
SciQuest Workflow Example

Requisition | Approvals | Comments | Attachments | History

Orientation: Horizontal

Submitted → Budget Auth → Org Approval 1 → Sponsored Programs → EHSS Approval → Create PO → Finish

Workflow Step Approvers (Sponsored Programs)

Approver Group: Fund: 414963 (In situ microbial conversion of seq): (All Values)
- Linda Bucy: lbucy@vt.edu
- Tom Cruise: cruise@vt.edu

Close
Imaging Paper Invoices

- All paper invoices are received in Accounts Payable from vendors or from departments.

- SciQuest purchase order directs vendors to mail invoices directly to Accounts Payable.

- Some invoices are still received directly by departments from vendors and departments forward to AP.

- All daily invoices received are sorted into three groups that correspond to the three AP teams.
Imaging Paper Invoices

- AP has identified 26 categories of invoice documents (i.e. reimbursements, prepayments, credit memos, etc.)

- A scanning employee does the following:
  - sorts the invoices into the 26 predefined categories
  - places a separator sheet (blank sheet with bar code) between each invoice document
  - logs the document counts on a scanning log
Imaging Paper Invoices

- Example of Scanning Log
  - Manual – manual document counts from AP analyst
  - Batch Generator – count from system after batch scanned
  - Index Import – count from system when documents placed in imaging/workflow system
Imaging Paper Invoices

- Once the documents are scanned
  - a batch generator process is submitted
  - this process obtains the next Banner invoice document number and assigns the number to the image
  - a document count is provided from this process which is entered on the log

- A process is run to import the documents into the BDMS imaging system and into the Banner workflow system
  - a document count is provided from this process which is entered on the log

- A team lead, supervisor or manager approves the scanning log at the end of the day
Using the Workflow System in AP

• Once a task has been placed in workflow for each invoice image:
  • AP analyst logs into workflow and sorts workflow tasks
  • AP analyst only sees tasks for their assigned team
  • Workflow tasks are named with assigned category name and Banner invoice number
  • When tasks are sorted, the oldest documents are listed first for each category
  • AP analyst selects the oldest documents for audit and entry into Banner from the category they are assigned to work
Using the Workflow System in AP

• Example of worklist in workflow system:
Using the Workflow System in AP

- AP analyst selects workflow item to process by clicking on workflow task

- This launches a Banner session
  - The Banner invoice form is automatically opened
  - The Banner invoice number pre-assigned to the document image is automatically populated in the document number field on Banner invoice form
  - The BDMS-Display Image icon is clicked on Banner invoice form and the invoice image opens in the adjacent monitor
  - The AP analyst audits the invoice and enters data in the Banner invoice form
Using the Workflow System in AP

- When invoice is completed in Banner, the workflow task is eliminated from the worklist

- If the invoice is saved and not completed in Banner, the workflow task remains in the worklist of the AP analyst that is working on it
  - It will not appear in worklist for other processors to view

- Supervisors and Managers have access to reassign documents between AP analysts as necessary
  - Document may be misclassified when scanned
  - AP analyst may be absent and in process document needs to be processed to meet payment due date
Using the Imaging System in AP

• Each AP analyst can make annotations on the invoice image which is stored in the system
• Annotations are viewable when images are retrieved later
• Annotation stamps are created in the imaging system which allow the AP analyst to stamp the image with their userid or with words such as enclosure, late, tax treaty, prepayment, etc.
• Supervisors can add or delete additional images to a document (example is an email)
Banner Travel & Expense System (TEM)

- Allows departmental users to attach images
  - No paper documents are submitted to Accounts Payable
  - Department keeps paper document for one fiscal year after year in which transaction occurred
  - Accounts Payable audits from image in the system

- All approvals are done in the workflow application and logged in the TEM system for history
TEM – Approval Workflow

- Non-sufficient funds (NSF) checking step and other validations
- Traveler approval if employee or student
- Supervisor approval if desired (optional)
- Financial manager (PI) approval (optional)
- Organization approval
- OESRC (export controls office) approval for international travel (TA only)
- Sponsored Program Administrator approval for international travel (TA only)
- Travel AP staff approval (TR only)
- Routing to Payroll for taxable reimbursements (i.e. moving & relocation)
- Second NSF checking step
TEM - History of Approvals

Vullikanti, A. 20130414-Turin, Italy (TA000224 - Approved)

Anil Vullikanti (ID: 904575457)

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Accounts Payable Paper Invoice Retention Procedures

• Travel – departments keep paper documents similar to p-card supporting documentation

• Invoice destruction for imaged documents is one year after the end of the applicable fiscal year
  • DOA commented on policy change – Tier III
  • Internal approval for state library requirements to switch to electronic for invoices
VT Payroll Process
Imagining of Payroll Documents

Getting started

- Identify most efficient process for area – set up a scanning station for use by one (or multiple people) or should each person have a scanning capability
- Ensure security of documents containing Personally Identifying Information (PII) - no transmission
  - Encrypt PII documents prior to transmission
  - Use dedicated scanners attached to a computer which does not involve transmission of PII
- Who should be involved in the project
- Who should lead the project
Imagining of Payroll Documents

• Getting Started
  • What types of documents should be scanned
  • Decide how to “name” documents – name each document type or group like/similar documents
  • Identify who within the group needs access to add/annotate or view what documents
  • Allow access for imaged documents to be viewed by others – document sharing among groups
  • Decide order of imaged documents –
    • Should new documents appear first?
    • Should former documents of the same type be archived?
  • Examine use of workflow – if not now, maybe for the future
Imagining of Payroll Documents

- HR and Payroll require much of the same information – document sharing important to eliminate duplication of effort

- Working with other areas who gather the same data to share imaged documents – i.e. at VT documents gathered by the international offices for Non-Resident Alien students that are also gathered by Payroll
Imagining of Payroll Documents

• Types of Documents
  • Social Security Card
  • Tax Forms – W-4, VA-4, Lock-in Letters
  • NRA Information – work authorization, change of status notices, data form
  • Wage Attachments – Garnishments, tax levies, child support orders
  • Misc. forms in each category
Imagining of HR/Payroll Documents

- HR began imaging “personnel file” documents in 2011
- All documents are imaged for new employees and all new “personnel file” documents are imaged for existing employees with a designation that the employee still has a paper file
- Work flow is used to send documents from “benefits area” to “transactions area” to process deduction changes
- Types of documents imaged
  - Copies of Social Security Card
  - Personnel Action Forms
  - Terms of offer letters/agreements
  - Benefits – salary reduction agreements
Journal Voucher Imaging

- Worked with Document Management Systems (DMS) team to deliver process to scan journal entries and provide images to users through the accounting system
- DMS staff provided demo of the delivered process to our office and provided a test environment that we used to verify the process worked correctly
- Problems encountered with viewing privileges
  - Delivered process would only allow users to view the document if they had access to all funds in the document
  - This was later changed to allow a user to view a document if they had access to at least one fund in the entry which is consistent with security for viewing accounts payable images
Journal Voucher Imaging

- All journal vouchers are imaged after they have been keyed into the accounting system
- Each document is loaded and indexed separately
Journal Voucher Imaging

- The scan is uploaded into the system and then indexed to a document already posted to the accounting system
- When the document ID is entered, the document information defaults from the system
Journal Voucher Imaging

- From within the accounting system, the user can access the document by clicking the BDMS – Display Document icon.
### Viewing the Document and Security

- The users can view the document and all its pages.
- Security is based on the user’s fund/organization access assigned in the accounting system.

---

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<th>Account</th>
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<td>12345</td>
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**Approval for charges**

**Prepared by:**

**Approval for credit:**

---

**Invent the Future**
Workflow Edits and Validations
Workflow Edits and Validations

- Traveler cannot perform organization approval for own authorization or reimbursement (workflow rejects)
- AP staff notified when itinerary dates overlap for traveler – potential duplicate payment
- AP staff notified when reimbursement has previously been returned for correction by AP
- If traveler has been reimbursed twice during fiscal year, reimbursement is rejected – traveler must sign up for direct deposit
Reporting
Reports - Invoices By Category in Workflow

Report is provided each morning by email

<table>
<thead>
<tr>
<th>Category</th>
<th>TEAM</th>
<th>TOTAL</th>
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<tbody>
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TEAM                        | TOTAL  |
-----------------------------|--------|
AP_Team_1                   | 1391   |
AP_Team_2                   | 301    |
In_Process                  | 145    |
Supervisor_CatchAll         | 2      |
Travel_Team                 | 258    |

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GRAND TOTAL
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2097

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### Reports – Workflow in Process Detail

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Challenges
Challenges

- Technology needs – dual monitors
- Technology skills of employees
- Change in work environment
  - Motivating employees with workload in an electronic format
- System down issues
- Technical support staff and resource needs
Discussion