

# CONTENT CENTRAL PROCEDURES GUIDE

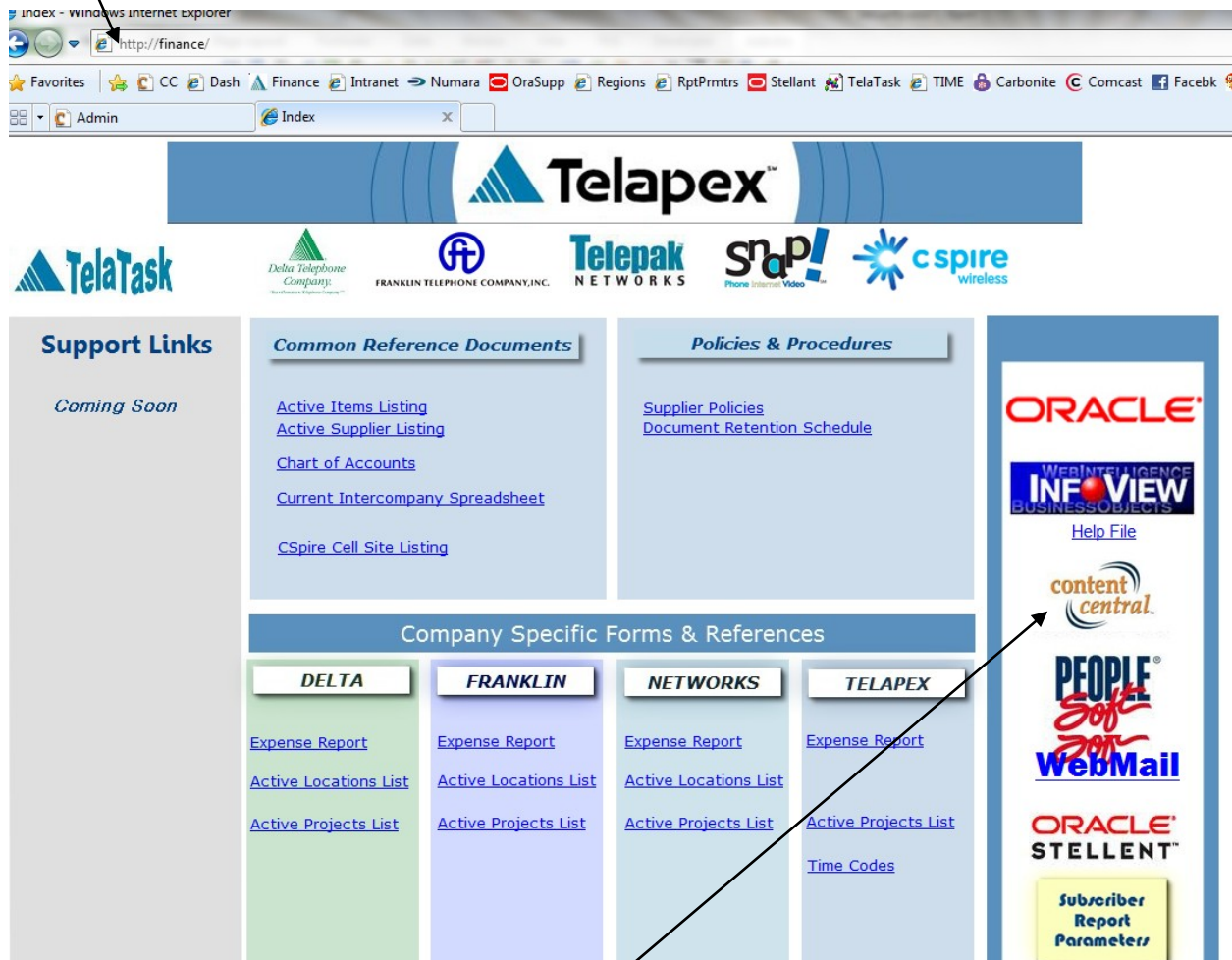
## REQUESTING A NEW VENDOR OR VENDOR ADDRESS

Content Central has been configured to route all W-9s that are captured as *Vendor Request* type to the vendor manager and back to the requestor to confirm its setup. Once the document is submitted, it will automatically enter the vendor request process.

### LOGGING IN:

Using a Web Browser, navigate to the Telapex Finance home page by typing "finance" into the address bar.

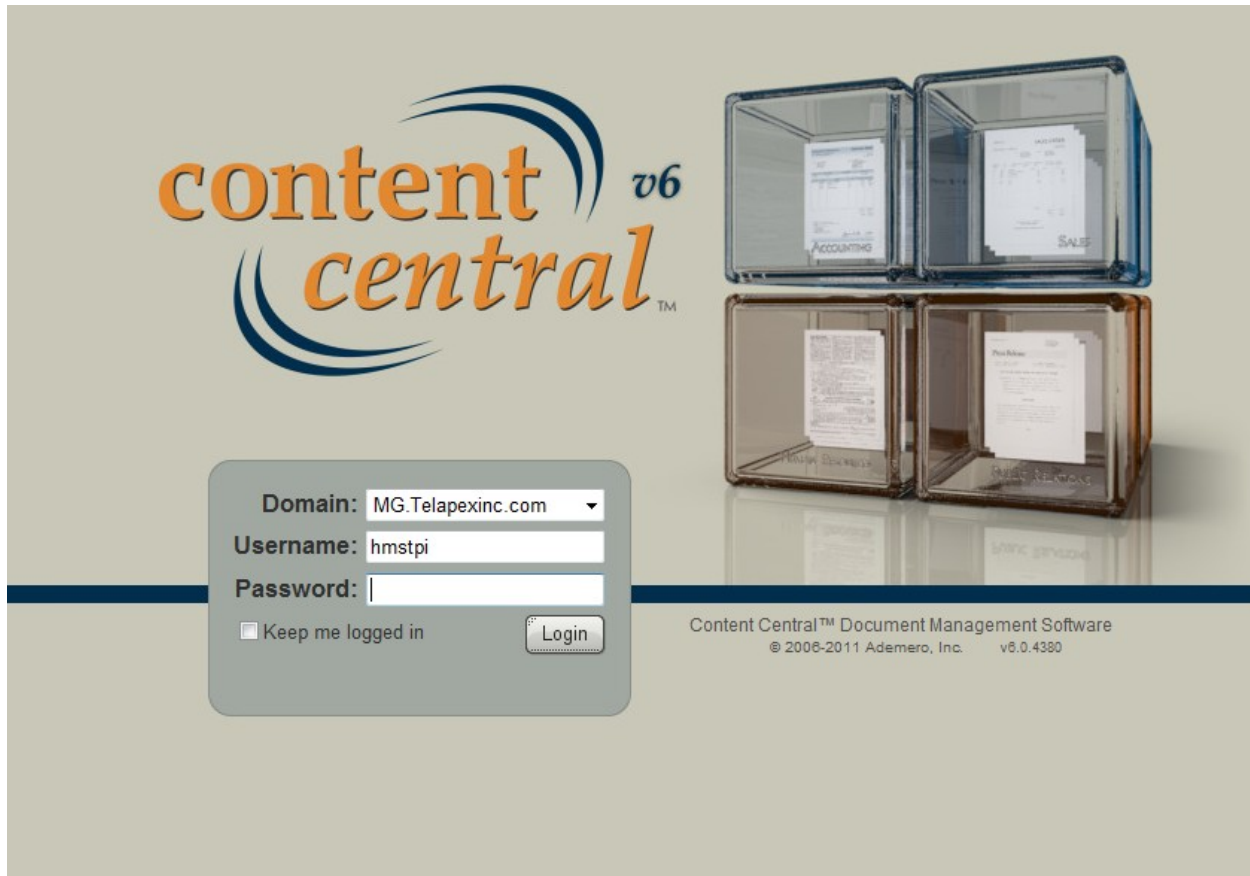
*Note: The "http://" in front should not be necessary when accessing from a computer on the company's network.*



Click on the *Content Central* icon.

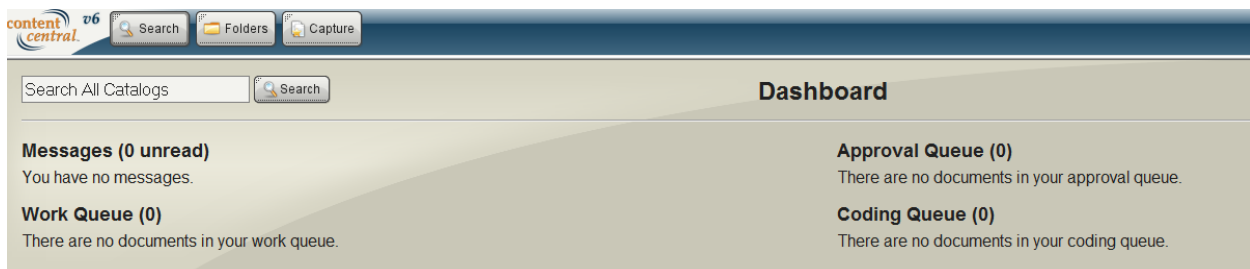
Enter your normal windows username and password and click *Login*.

*Make sure the "Domain" field is populated as shown. If not, click the drop-down arrow to the right to select "MG.Telapexinc.com" from the list before entering your username and password.*



The image shows the login screen for Content Central v6. The logo "content central v6" is in orange and blue. To the right is a 3D graphic of four transparent filing cabinets labeled "ACCOUNTING", "SALES", "HUMAN RESOURCES", and "FINANCIAL SERVICES". The login form is a grey box with the following fields: "Domain:" with a dropdown menu showing "MG.Telapexinc.com", "Username:" with the text "hmstpi", and "Password:" with an empty field. Below the password field is a checkbox labeled "Keep me logged in" and a "Login" button. At the bottom right of the form area, it says "Content Central™ Document Management Software © 2006-2011 Ademero, Inc. v6.0.4380".

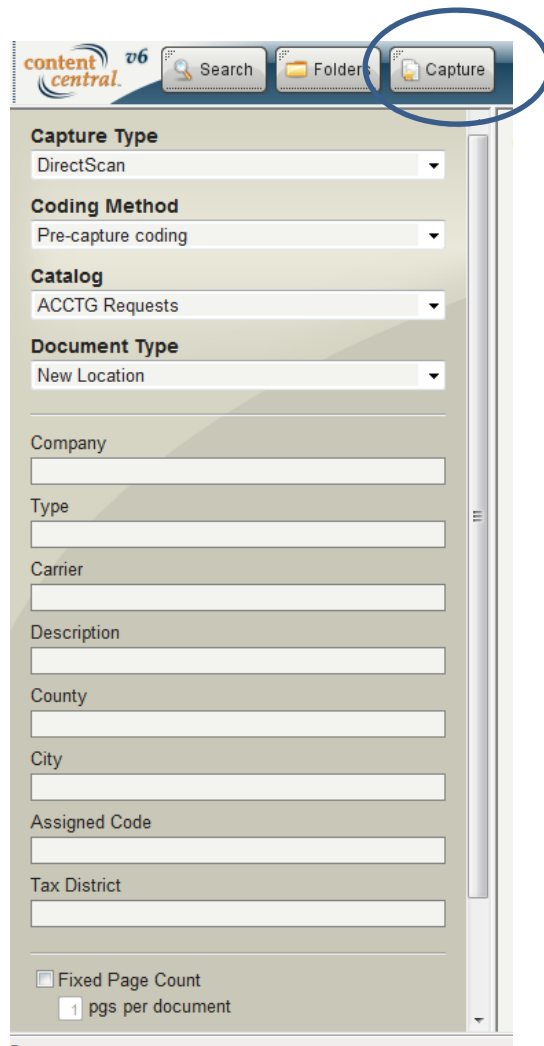
The Content Central Home Page should display as follows.



The image shows the dashboard of Content Central v6. The top navigation bar includes the "content central v6" logo and buttons for "Search", "Folders", and "Capture". Below this is a "Search All Catalogs" input field with a "Search" button. The main content area is titled "Dashboard" and contains four sections: "Messages (0 unread)" with the text "You have no messages.", "Work Queue (0)" with the text "There are no documents in your work queue.", "Approval Queue (0)" with the text "There are no documents in your approval queue.", and "Coding Queue (0)" with the text "There are no documents in your coding queue."

## SUBMIT A VENDOR REQUEST:

To submit a W-9 form requesting a new vendor, click on the CAPTURE button to display the screen below:



The screenshot shows the 'Content Central v6' interface. In the top navigation bar, there are three buttons: 'Search', 'Folders', and 'Capture'. The 'Capture' button is circled in blue. Below the navigation bar, the 'Capture' form is displayed with the following fields:

- Capture Type**: DirectScan (dropdown menu)
- Coding Method**: Pre-capture coding (dropdown menu)
- Catalog**: ACCTG Requests (dropdown menu)
- Document Type**: New Location (dropdown menu)
- Company**: (text input field)
- Type**: (text input field)
- Carrier**: (text input field)
- Description**: (text input field)
- County**: (text input field)
- City**: (text input field)
- Assigned Code**: (text input field)
- Tax District**: (text input field)
- ☐ Fixed Page Count
- pgs per document

Change the **Capture Type** to “Electronic” and the **Document Type** to ”New Vendor”. Fields, as shown below, will be presented for completion. Any fieldname ending with an asterisk (\*) is a *required* field. Complete each field as requested.

*While it is not shown below, do NOT enter anything in the Vendor Number field as it is reserved for the number assigned to the new vendor automatically by Oracle upon creation.*

The screenshot shows the 'Content Central v6' interface for 'Capturing Documents'. The top navigation bar includes 'Search', 'Folders', and 'Capture' buttons. The main form area is split into two panes. The left pane contains the following fields:

- Capture Type**: Dropdown menu set to 'Electronic'.
- Coding Method**: Dropdown menu set to 'Pre-capture coding'.
- Catalog**: Dropdown menu set to 'ACCTG Requests'.
- Document Type**: Dropdown menu set to 'New Vendor'.
- Company\***: Dropdown menu.
- Vendor Name\***: Text input field.
- Address1\***: Text input field.
- Address2**: Text input field.
- City\***: Text input field.
- State\***: Text input field.
- Zip\***: Text input field.
- Vendor Type\***: Dropdown menu.
- Comments**: Text area with scrollbars.

The right pane is titled 'Capturing Documents' and contains the following text:

- DirectScan™** allows you to capture...
- QCards™** contain barcodes and c...
- Electronic capture** lets you upload...
- Form capture** allows you to gener...
- Custom Barcode** lets you capture...

At the bottom of the right pane, it says: 'For complete information on capturing, s...'.

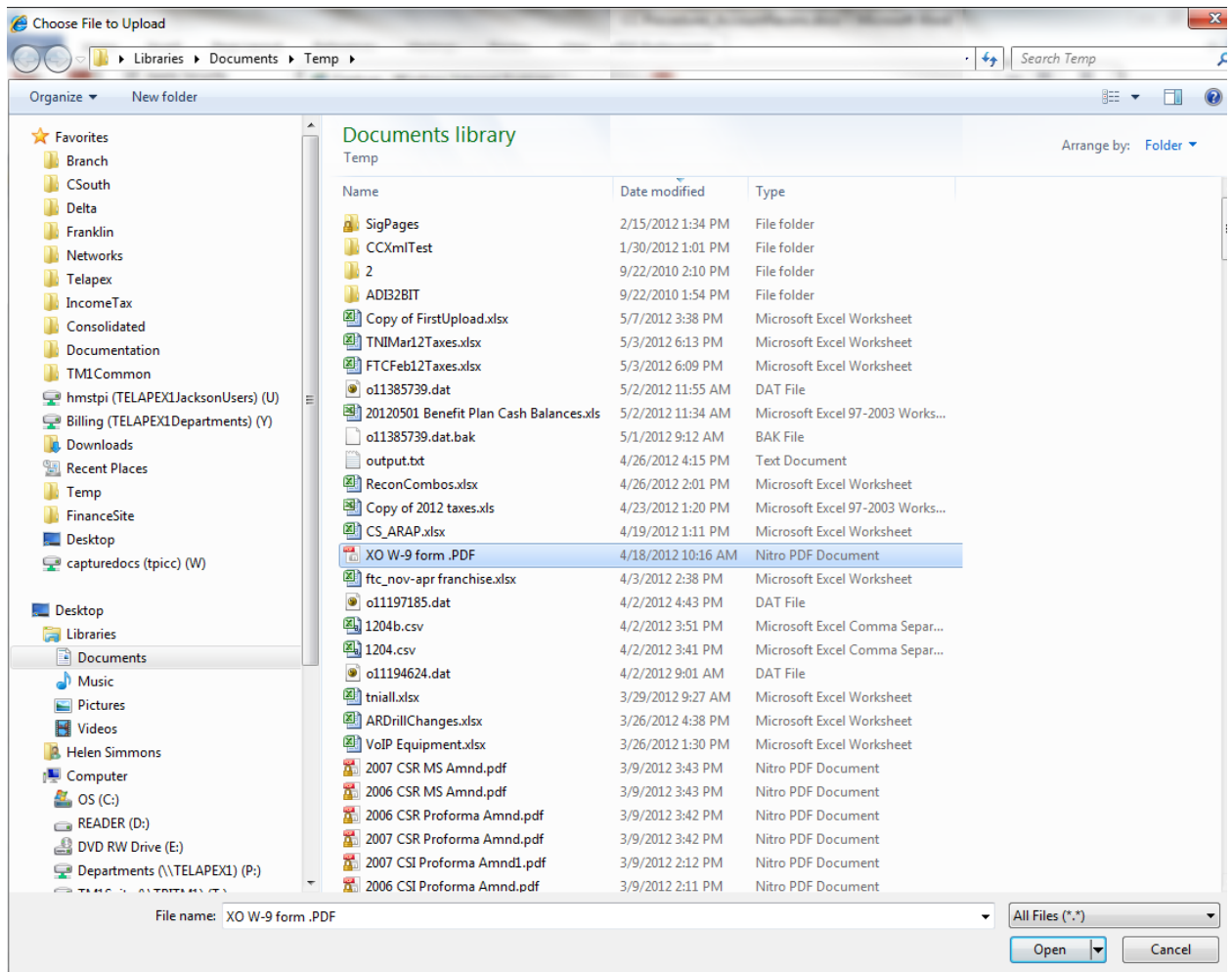
Once all fields are populated, click BROWSE to locate the W-9 form to be uploaded.

*Completed W-9 forms obtained from the vendors should be scanned as a PDF file to any folder accessible by the local computer or, if received via email, saved to a folder on the local computer.*

The screenshot shows a web form for vendor information. The fields are as follows:

- Company\***: A dropdown menu with "Telapex" selected.
- Vendor Name\***: A text input field containing "New Vendor Name".
- Address1\***: A text input field containing "123 Hometown St".
- Address2**: An empty text input field.
- City\***: A text input field containing "Hometown".
- State\***: A text input field containing "MS".
- Zip\***: A text input field containing "39999".
- Vendor Type\***: A dropdown menu with "FACILITYSUPP" selected.
- Comments**: A large text area with a scrollbar, currently empty.
- Vendor Number**: An empty text input field.
- Select document to capture.**: A section with an empty text input field and a "Browse..." button circled in blue.
- Upload**: A button with a document icon and the text "Upload".
- Clear**: A button with the text "Clear".

Navigate to the applicable directory where the image or PDF file was saved, highlight the file to be uploaded, and press OPEN.



Company  
Telapex

Vendor Name\*  
New Vendor Name

Address1\*  
123 Hometown St

Address2

City\*  
Hometown

State\*  
MS

Zip\*  
39999

Vendor Type\*  
FINANCIAL

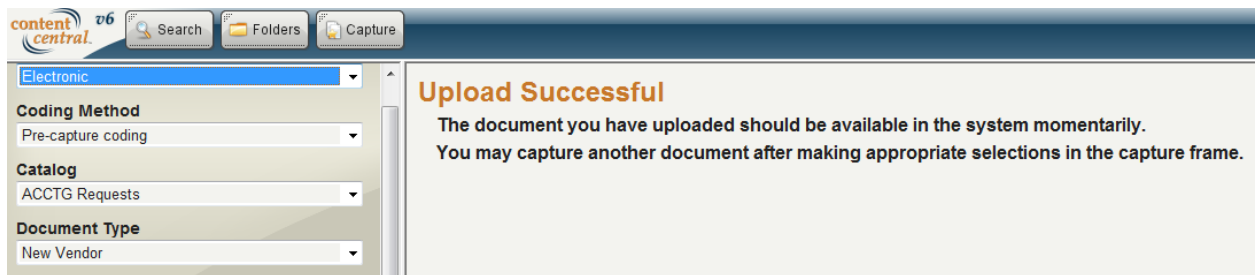
Comments

Vendor Number

Select document to capture.  
C:\Temp\XO W-9 form .PDF

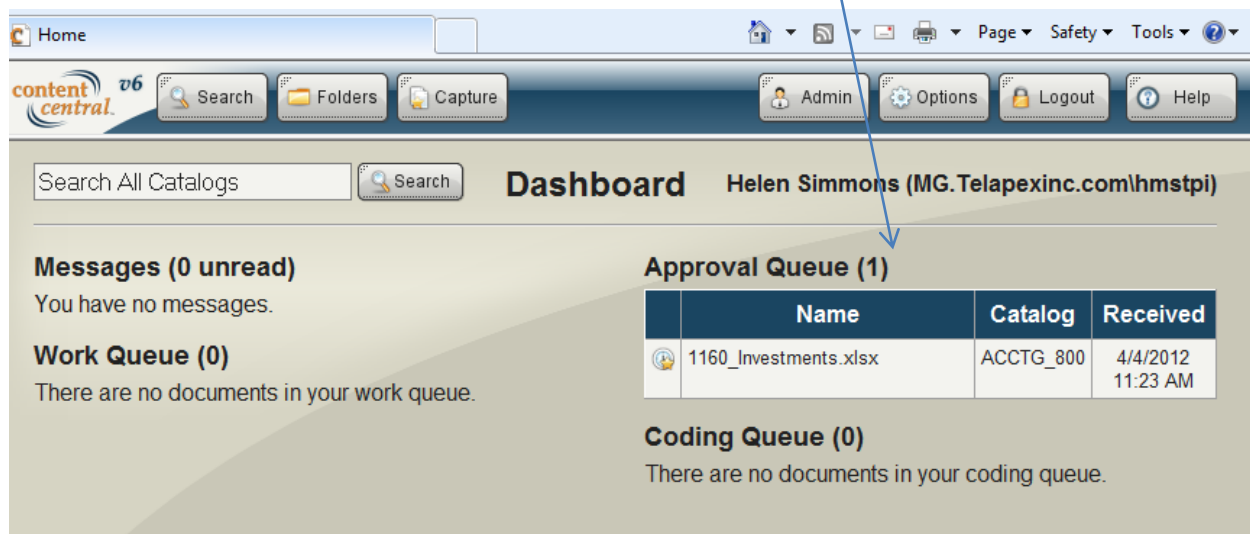
The full path for the highlighted file will now show in the field and you should click the UPLOAD button to capture and file the document.

The “Upload Successful” message should now appear and you can continue to work in Content Central or logoff.



### APPROVAL QUEUE:

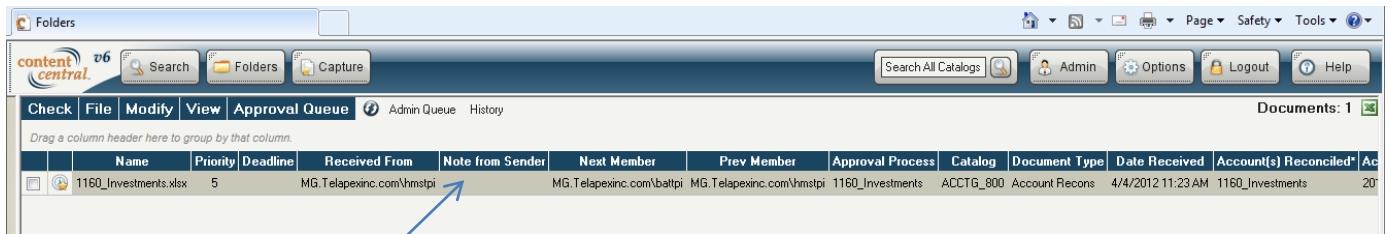
If the vendor manager needs additional information or clarification, the vendor request will be return to the requestor and will appear in the *Approval Queue*. (An email notification will also be sent to the requester notifying them of the returned request.)



Access the documents in the *Approval Queue* by simply clicking anywhere in the *Approval Queue* pane on the *Dashboard*.

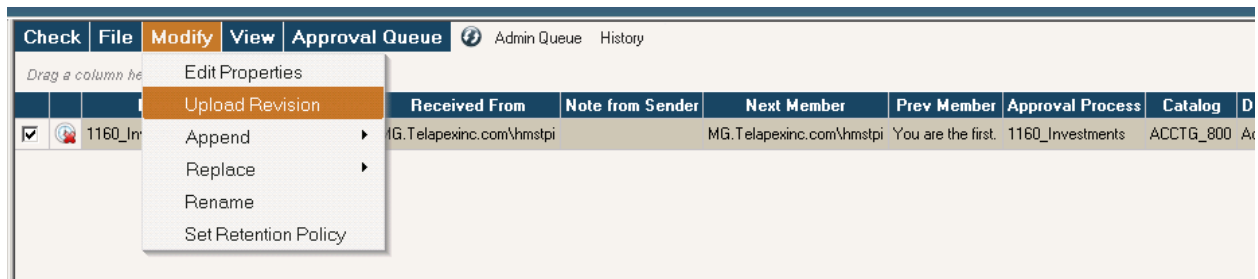
Opening the *Approval Queue* will display a listing of all documents in the queue....



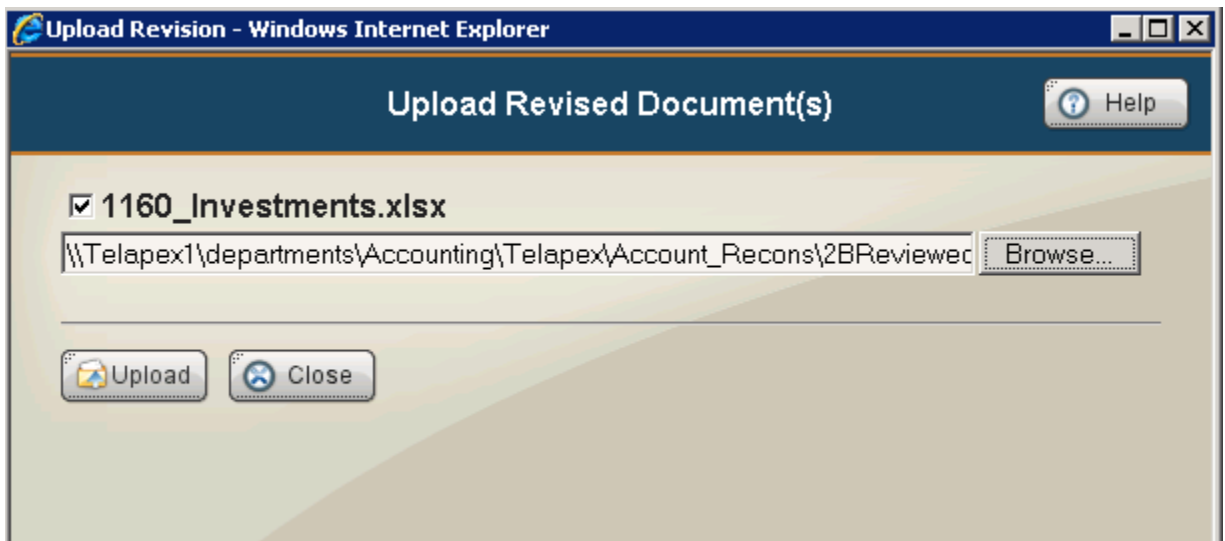


The **Note from Sender** column will display the notes from the reviewer about what is needed before the vendor can be created.

If a revised W-9 is required, obtain the updated form from the vendor, check the box to the left of the document, hover your cursor over **Modify** in the Queue menu and click *Upload Revision*.

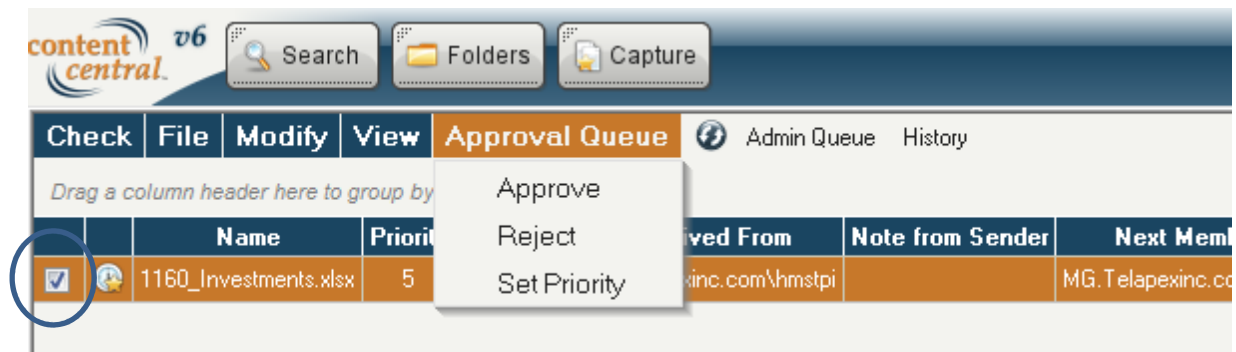


This will present a window for you to browse to and select the new W-9 file. Then click **Upload** to submit the new form to CC.

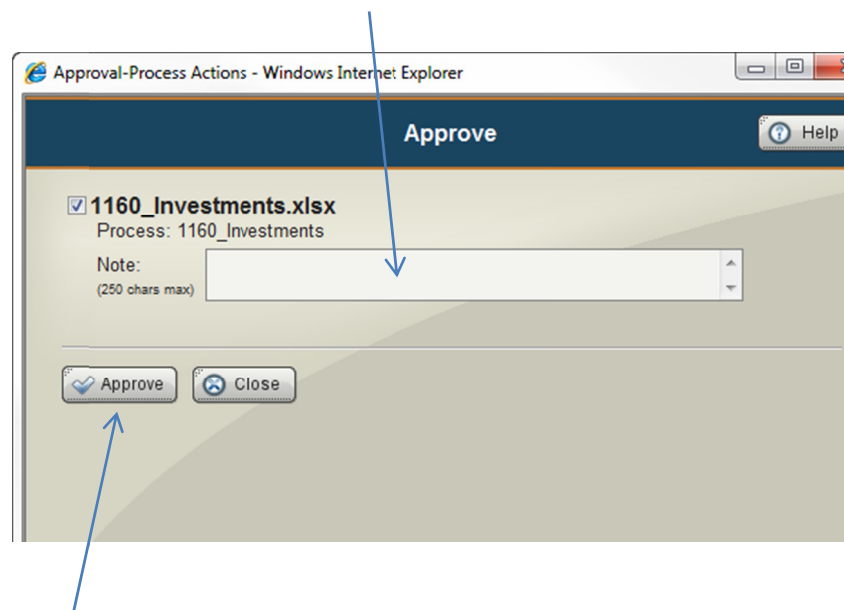


Once the new W-9 form is captured, or if just a text answer needs to be provided to the request, the document can be “approved” to send it back to the vendor manager.

Check the box to the left of the document, hover your cursor over **Approval Queue** in the Queue menu and click *Approve*...



...which will give you a chance to add any notes to provide the requested information to the vendor manager and then...



...click *Approve* to complete the task. *Close* will cancel the approval selection and return to your approval queue document list.

Once a vendor has been added by the vendor manager, the requester will receive an email indicating the completion and the resulting vendor number.

**SUBMIT A VENDOR ADDRESS ONLY REQUEST:**

When only a new address is required for an existing vendor, the process is almost exactly the same with only the following differences:

- The document to be submitted with the request may be a W-9, an invoice copy, or even just a quote. Anything that shows the new address is needed and its purpose (for purchase orders or invoices or both) is acceptable.
- When capturing the address request, select "New Vendor Address" as the **Document Type** rather than "New Vendor".
- The email notification of the completed addition will contain slightly different information.

Otherwise, the process is exactly the same as detailed for requesting a completely new vendor.