

Hello All,

To improve and expedite our invoice approval process, we recently implemented new software - DocuWare. DocuWare provides the ability to process invoice approvals electronically. This will assist Accounting in the status of pending invoice approvals, and open invoices. If you are receiving this email, you are an invoice approver that will be utilizing the system.

Below is a link to the instructions you need to follow to register as a first time user of DocuWare. If you encounter any issues while registering, or as you being to use DocuWare, please contact IT via the ticket system.

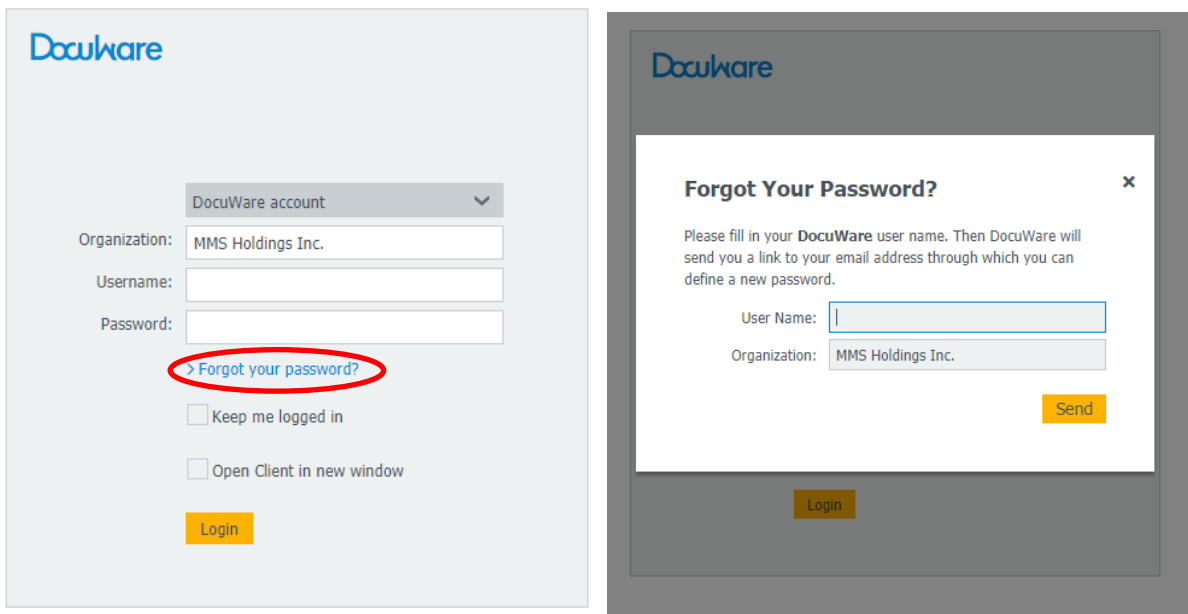
LINK TO THE INSTRUCTIONS (To Be Added)

Navigate to the following website:

<https://docuware-online.com/DocuWare/>

In order to access DouWare, please following the below instructions:

Select “Forgot your password”



The image contains two screenshots of the DocuWare login interface. The left screenshot shows the main login page with a 'Forgot your password?' link circled in red. The right screenshot shows the 'Forgot Your Password?' dialog box with a 'User Name' input field and a 'Send' button.

Enter your Username which is your First initial last name.

Example “Jan Noelke”: jnoelke

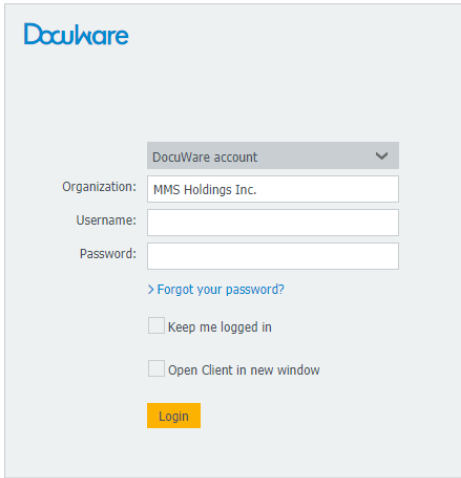
Organization: **MMS Holdings Inc.**

*****If you receive an error message – Contact IT*****

You will then receive an email with instructions from DocuWare to reset your password.

Once your password is reset, navigate back to the website and sign in:

<https://docuware-online.com/DocuWare/>



DocuWare

DocuWare account

Organization: MMS Holdings Inc.

Username:

Password:

> Forgot your password?

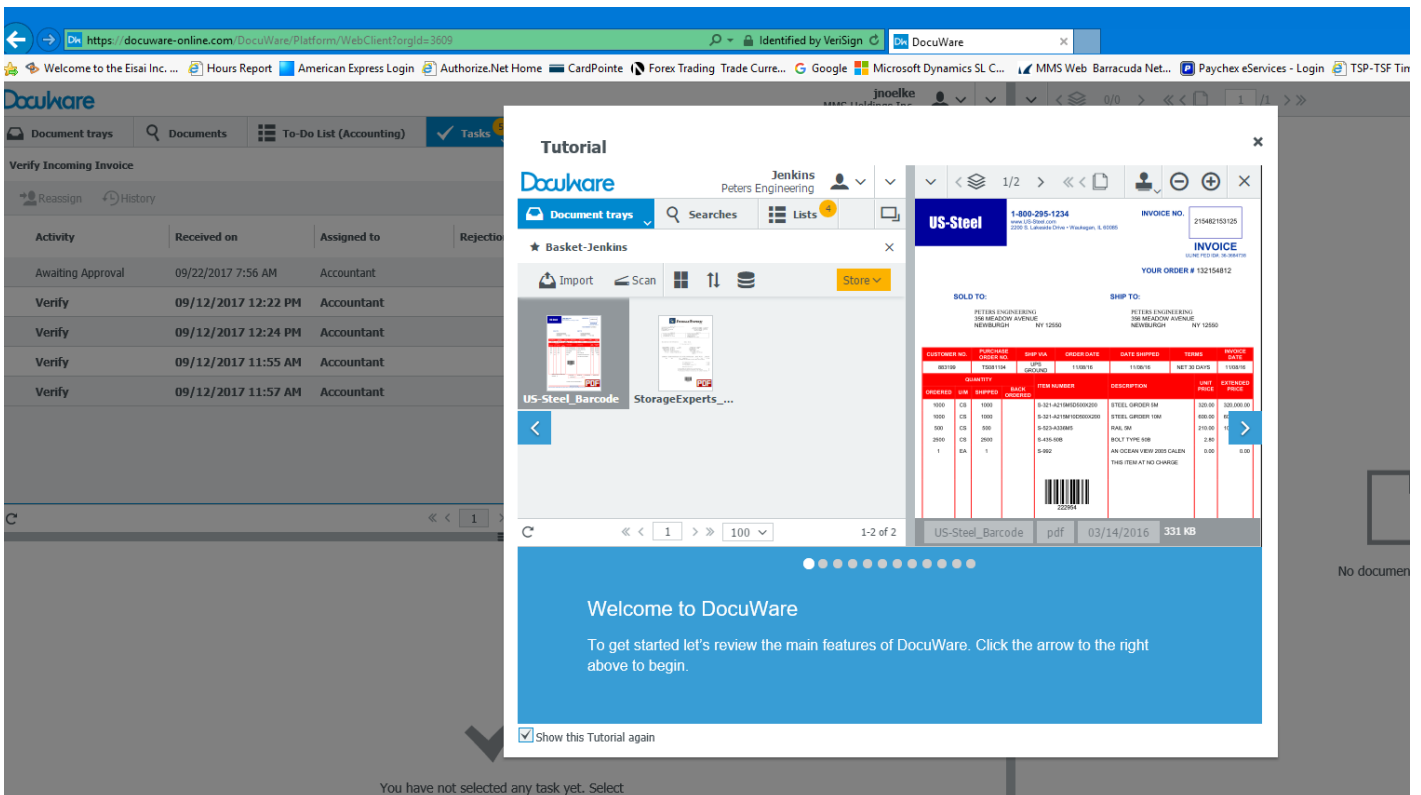
Keep me logged in

Open Client in new window

Login

Once you have completed the above steps and are able to access DocuWare, a survey may appear for you to complete (this is random and am not sure who will receive the survey).

Tutorial may pop-up for you to view, this tutorial is not intended for the approval users, please close.

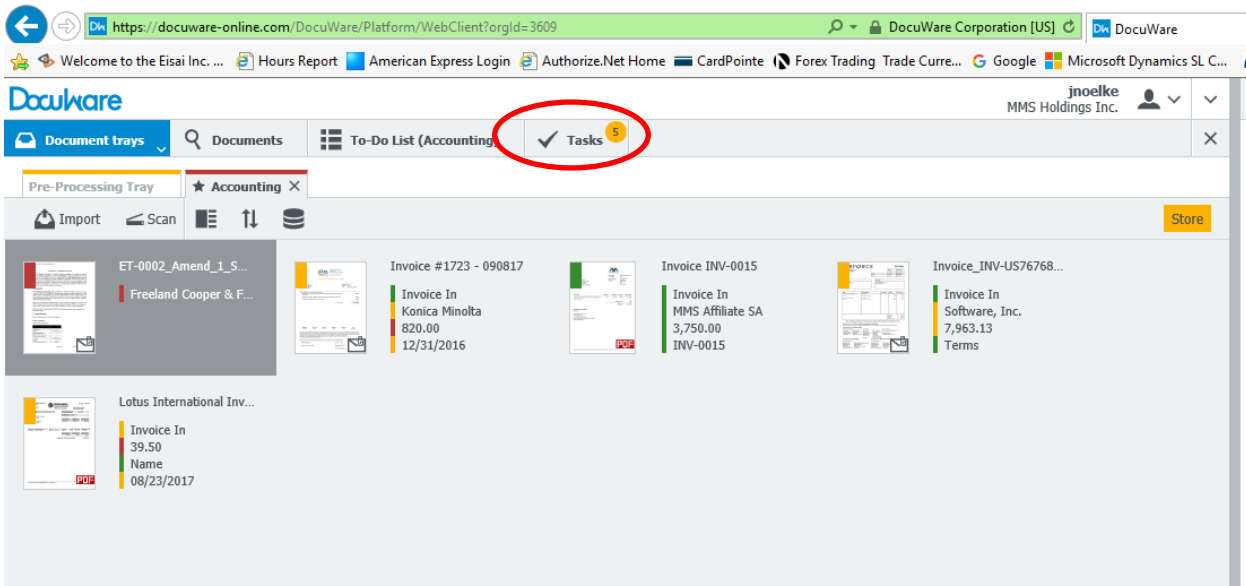


The screenshot shows the DocuWare web interface. In the background, there is a 'Verify Incoming Invoice' table with columns for Activity, Received on, Assigned to, and Rejection. The foreground features a 'Tutorial' overlay window. The tutorial window has a title bar 'Tutorial' and a DocuWare logo. It contains a 'Document trays' section with a search bar and a 'Basket-Jenkins' section with document thumbnails. To the right, there is a preview of a 'US-Steel' invoice with a table of order items. At the bottom of the tutorial, a blue box says 'Welcome to DocuWare' and 'To get started let's review the main features of DocuWare. Click the arrow to the right above to begin.' There is a checkbox 'Show this Tutorial again' which is checked.

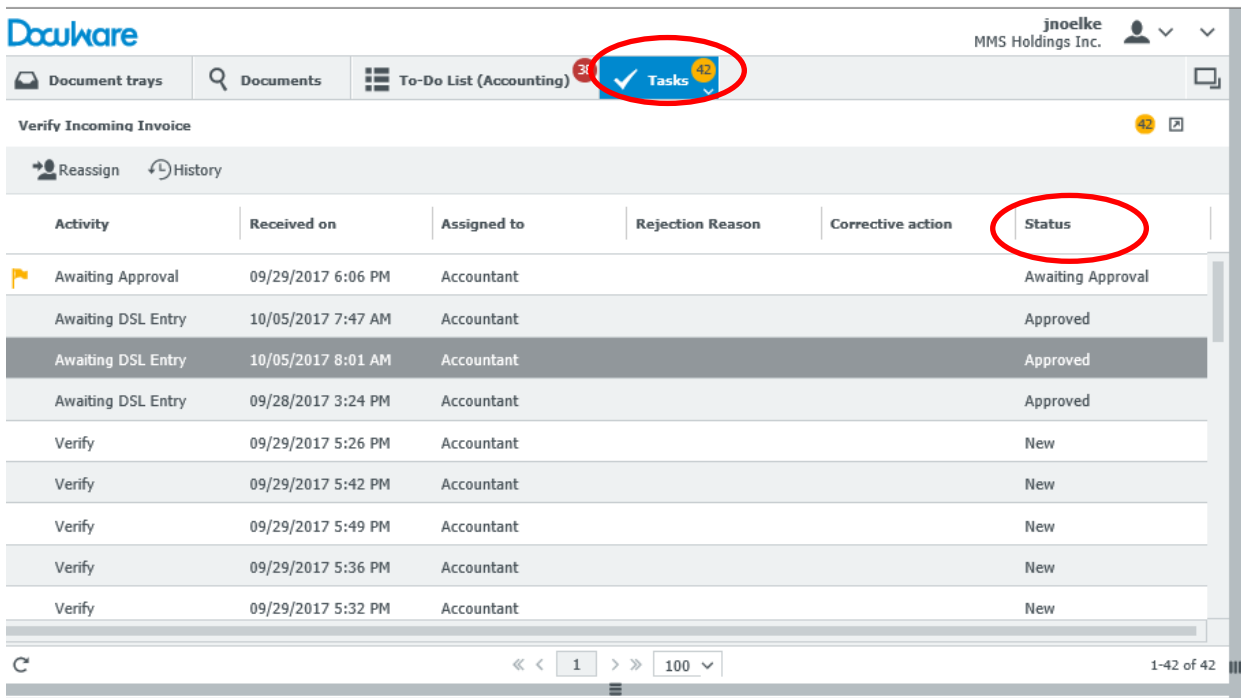
ACTIVITY	RECEIVED ON	ASSIGNED TO	REJECTION
Awaiting Approval	09/22/2017 7:56 AM	Accountant	
Verify	09/12/2017 12:22 PM	Accountant	
Verify	09/12/2017 12:24 PM	Accountant	
Verify	09/12/2017 11:55 AM	Accountant	
Verify	09/12/2017 11:57 AM	Accountant	

ORDERED	QTY	UNIT	DESCRIPTION	UNIT PRICE	EXTENDED PRICE
1000	CS	1000	STEEL ORDER 100	800.00	800.00
100	CS	800	STEEL ORDER 100	800.00	80.00
100	CS	800	RAIL 90	210.00	21.00
2000	CS	2000	ROLY TYPED 008	2.00	4.00
1	EA	1	AN CLEAN WED 000 CALDN	0.00	0.00
			THIS ITEM AT NO CHARGE		

Once the Tutorial has been closed, you can view your tasks in Tasks Tab. This will show how many tasks (open invoices pending your approval) need to be completed:



Click on Tasks Tab to view your tasks and the current status of each task. You can also click on Status to sort.



Double click on a task to view. On the right, DocuWare has stamped the invoice showing who the invoice was routed from and the approver chosen.

In the example below, the invoice was routed from jnoelke and the approver is Accountant. In most instances, the task will be to choose 'Approved' or 'Rejected' for the invoice shown. On the left, you will need to determine the action to take for the invoice.

If 'Rejected' is chosen, a 'Rejection Reason' box will appear to input the reason for rejecting the invoice.

Once you have completed your approval or rejection, the 'Confirm' box will be active to select. Once Confirm is selected, the task will then be routed to the appropriate user.

The task will no longer appear in your Task list and the *next user* will see an additional DocuWare stamp for the approval/rejection of the invoice with the approver's name and the date of approval/rejection.

The screenshot shows the DocuWare interface. On the left, the 'Verify Incoming Invoice' task list is visible. The 'Tasks' button in the top navigation bar is circled in red. On the right, an invoice document is displayed. A red circle highlights a stamp on the invoice that reads 'joelke 10/5/2017 Approved'.

Rep	DATE	Invoice #
MIYBW	8/22/2017	407257

P.O. NO.	TERMS	DUE DATE	TREES SAVED
	Net 30	9/21/2017	4

ITEM	QTY	DESCRIPTION	RATE	AMOUNT
Standard Executive Console	1	Standard Executive Console	47.37	47.37
Additional 40" Console	3	Additional Executive Console	5.00	15.00

Payments/Credits \$0.00
TOTAL DUE: \$62.37

You can also forward the invoice by using the envelope in Tools. If the Tools are not displayed, click on the arrow, circled in red below, so it is pointing up, to display Tools. Use the envelope icon to send the document to someone.

The screenshot shows the DocuWare interface with a document tray. A red circle highlights an upward-pointing arrow in the top navigation bar. A blue circle highlights the 'Send document' and 'Send page' options in the Tools menu.

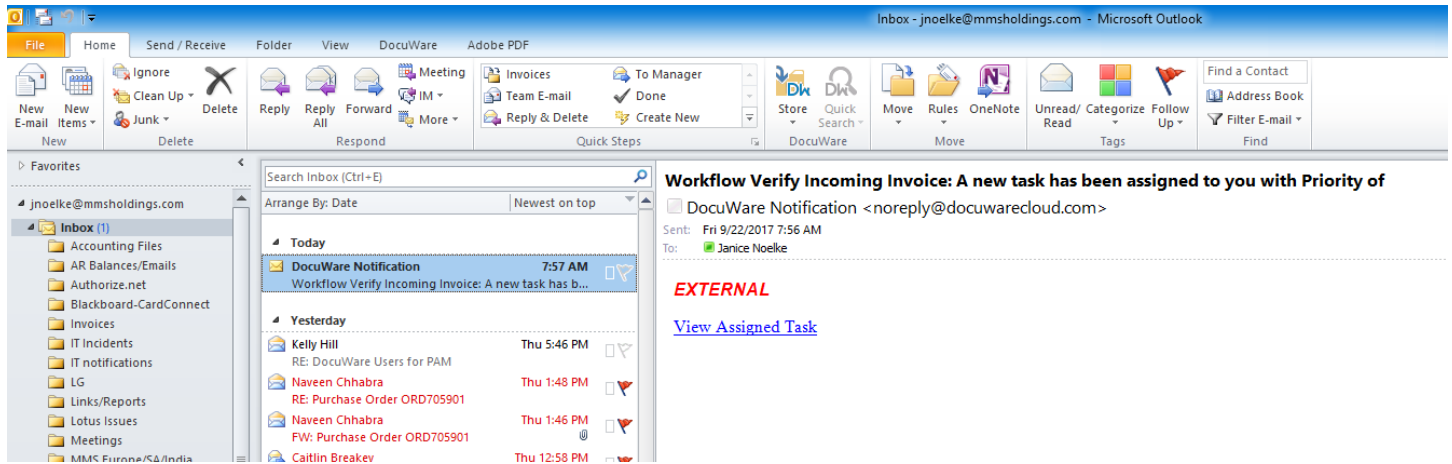
Vendor-Approver Info link:

<http://mmsservervm6/pam/Account%20Management/Vendor-Invoice%20Info.xlsx>

Expectation for reviews: Time allocated = 3 days to reject or approve.

If you need access to invoices that were previously approved/rejected in DocuWare, please contact Accounting.

After the initial sign-in, if you have a task to complete, you will receive an email notification from DocuWare that a task has been assigned to you. Click on the link in the email to navigate to the DocuWare sign-in. After signing in, you can view your tasks as stated in the above instructions.



Docuware link:

<https://docuware-online.com/DocuWare/>