Certainty
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ECM Viewpoint

Guide for University of Queensland Faculty and Department Staff
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How to use this document

The User Guide has two major sections.

The first section describes generic functionality of the user screens and how to navigate them. Examples and diagrams are sourced from both, The University’s ECM Viewpoint services and from Computershare’s demonstration system, FastCharge. Some colours and wording may not exactly match what you will see when using The University of Queensland service.

The second section describes specifics of University of Queensland’s user screens and many aspects of normal use of the service. In this section you will find screen shots that match those configured for the University of Queensland.

Tips & Tricks

Throughout the document you will find additional tips and some tricks on getting the most out of the system interfaces. Tips & Tricks will look like this:

Tips like this one will help you to avoid common mistakes, or help you get your work done quicker. Please consider using these tips.
Generic Functionality of ECM Viewpoint

Search Screens and Navigation

When you log into the system, depending on your User setup you will be presented with one of two initial views; either a simple ‘Welcome’ with a menu bar above as below.

![Initial view for University Staff User type](image)

Figure 1 - Initial view for University Staff User type

Selecting a Search View

The Menu Bar at the top of the screen will provide the User access to a number of functions of the system. The options available in the Menu Bar will change based on context and User configuration.
Most menu bar items have sub-menus that will pop down when you hold the mouse pointer over the menu item for a few seconds. In the sample above you will see that the 'Search' menu bar item opens to reveal only one menu item; 'General Search'.

Search Basics

Each Search Screen has a Filter Criteria section and a Results section. The Filter Criteria section is where you can specify characteristics of the documents you are looking for. This could be a range of dates the documents were created, it could be the Member or Policy number, or any of the other characteristics displayed in the section. Use this section to reduce the number of documents returned in the Results section to make it easier to find the document you need.

The Results section displays a list of documents that match the criteria you have specified in the Filter Criteria section. The Results section is where you take action on the document you want to work with.

The Fields available in the Filter Criteria section and the Result section vary depending on the Search Screen selected and the Roles a User has been assigned.

Types of search fields

The search fields have been configured according to the needs and desires of the University of Queensland. The following sections describe the characteristics of a few of the field types and how to use them.
Text Fields

For Text Fields there are a number of different behaviours that can be configured for search results. Only 2 types of search filed are used in The University’s implementation. The table below describes the 2 types of text search fields you will encounter and which search fields are set up for that type of filtering.

Table 1 - Field search types and behaviours

<table>
<thead>
<tr>
<th>Contains</th>
<th>What you type can be found somewhere within the field value and is not required to be at the beginning or end of words within the field value.</th>
</tr>
</thead>
</table>

For example: The value “on” in the Name search box will return the highlighted records in the following table.

<table>
<thead>
<tr>
<th>Name</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sam Jones</td>
<td>12345678</td>
</tr>
<tr>
<td>Samantha Jones</td>
<td>23456789</td>
</tr>
<tr>
<td>Tina Jones</td>
<td>34567890</td>
</tr>
<tr>
<td>Tom Sam</td>
<td>45678901</td>
</tr>
</tbody>
</table>

Used when filtering on:

- Document No.
- Supplier Invoice Number
- UQ Purchase Order Number
- Notes
- Vendor ID
**Exact Match**

What you type must match exactly what is in the field value.

For example: The value “Sam Jones” in the Name search box will return the highlighted records in the following table.

<table>
<thead>
<tr>
<th>Name</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sam Jones</td>
<td>12345678</td>
</tr>
<tr>
<td>Samantha Jones</td>
<td>23456789</td>
</tr>
<tr>
<td>Tina Jones</td>
<td>34567890</td>
</tr>
<tr>
<td>Tom Sam</td>
<td>45678901</td>
</tr>
</tbody>
</table>

**Used when filtering on:**

Batch ID  
Supplier ABN

**Searching/Filtering by Date**

Items can also be filtered by specific dates. Just enter dates in the From and To fields and execute the search.

**Shortcut Commands**

Shortcut keys have been defined for your convenience. Place the cursor in one of the date fields and press a shortcut key (T, C, Down, Up, PageDown, PageUp) and the date will be adjusted accordingly.

If you forget the shortcut keys, just click on the text box to the left of the calendar and a list will be displayed. The list is displayed if the cursor is held over either the From or To fields for a moment.

**Selecting a Date from the Calendar**

Another way to select dates is by using the Calendar. Click on the Down Arrow next to the date field and a Calendar will appear. Select a date from the current month or use the arrows at the top to change the month. PageUp and PageDown shortcut keys are also available to change the month.
Next to the year in the Calendar dropdown, there is a Down Arrow. Click on this arrow to bring up a window listing all 12 months and all years from which to select. There is also a Left Arrow and a Right Arrow to aid in selection. Highlight the desired month and year and click OK to apply.

Predefined Periods

To the left of the From field is a Double-Calendar icon. Clicking this icon will display a dropdown with common date ranges. When one of the entries is selected, the From and To fields will be populated with appropriate values.

Performing a Search / Applying a Filter

Searching, or applying a filter, is how you manage the large number of documents stored in the system to locate the one document you need. In some cases you will need to provide some form of filter information before any records can be returned.
To perform a Search:

Enter the desired Filter Criteria
Perform the Search by either:
Pressing **Enter**, or
Clicking on **Apply Filter** located on the right

![Search Interface](image)

The system will perform a search and Return a list of documents that match the criteria into the Result Section.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Account Number</th>
<th>Date</th>
<th>Document Type</th>
<th>Amount</th>
<th>Notes</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Miss Sandy Jones</td>
<td>173487034</td>
<td>03/05/2012</td>
<td>Statement</td>
<td>$1,547.65</td>
<td>Add Note</td>
<td>View</td>
</tr>
<tr>
<td>2</td>
<td>Miss Sandy Jones</td>
<td>173487034</td>
<td>03/05/2012</td>
<td>Statement</td>
<td>$1,541.98</td>
<td>Add Note</td>
<td>View</td>
</tr>
<tr>
<td>3</td>
<td>Miss Sandy Jones</td>
<td>173487034</td>
<td>03/05/2012</td>
<td>Statement</td>
<td>$1,544.66</td>
<td>Add Note</td>
<td>View</td>
</tr>
<tr>
<td>4</td>
<td>Miss Sandy Jones</td>
<td>173487034</td>
<td>03/05/2012</td>
<td>Statement</td>
<td>$1,541.98</td>
<td>Add Note</td>
<td>View</td>
</tr>
<tr>
<td>5</td>
<td>Miss Sandy Jones</td>
<td>173487034</td>
<td>03/05/2012</td>
<td>Statement</td>
<td>$1,541.98</td>
<td>Add Note</td>
<td>View</td>
</tr>
</tbody>
</table>

If no results match the criteria, the system will display a message in the Result List letting you know that “There are no results to display”.

**Clearing the Filter**

Sometimes you will want to start again. You may have completed a recent search and used many of the available filter fields, and now you want to begin on another search with a fresh screen.

You can quickly clear all of the filter fields in the search screen with a single mouse click.

To clear the Filter Criteria:

Click on **Clear Filter** located on the right hand side of the Filter Section.

The system will reset the Filter Criteria to the default for the View.
Working with results

Sorting

Clicking on a column heading will switch between ascending and descending sort order on that column.

<table>
<thead>
<tr>
<th>Date</th>
<th>Document Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/01/2011</td>
<td>Welcome Letter</td>
</tr>
<tr>
<td>03/02/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/03/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/04/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>21/04/2011</td>
<td>Reminder Notice</td>
</tr>
<tr>
<td>03/05/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/06/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/07/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/08/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/09/2011</td>
<td>Statement</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Document Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/09/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/08/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/07/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/05/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/05/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>21/04/2011</td>
<td>Reminder Notice</td>
</tr>
<tr>
<td>03/04/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/03/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>03/02/2011</td>
<td>Statement</td>
</tr>
<tr>
<td>02/01/2011</td>
<td>Welcome Letter</td>
</tr>
</tbody>
</table>

Viewing

Viewing individual documents

Click View located on the right hand side of the screen.
After clicking 'View' a PDF will be displayed in a new window (Please see further below for an example)

Viewing multiple documents

To view multiple documents at the same time click the check boxes on the far left side of the list results, for each document you want to view.

Then click View Selected, and the documents selected will appear in a new screen and will be concatenated into a single PDF.
Document Notes

Notes can be added to any document by Users and are used to provide a stable trail of comments by various users as they view/process documents.

Note functionality is available to all Document Types and to all Users although only “AP Admin” users are able to delete notes.

Available functions are:-

- Search and View Document Notes
- Add Document Notes
- View Document Note Events

Search and View Document Notes

After performing any document search function, those documents which have 1 or more notes attached will display a “Note” icon which can be selected to view the note(s):

You can search for only those documents that contain notes (within any other search criteria) by selecting the check box “Has Notes” when setting your search criteria. This will cause only those documents that contain notes to display:
You can search for documents with notes containing a specific word or phrase:
Add Document Notes

To add a note to a document which so far has no notes, select the “Add Note” icon in any document in the search results. A new note dialogue box will appear for you to enter Subject and Body comments. Standard “OK”, “Cancel” and “Apply” commands will apply after content has been entered:

To add another note to a document which already has one or more notes, select the “Note” icon in any document in the search results and proceed to enter an additional note in the dialogue box:
View Document Note Events

The history of all events affecting a note can be viewed:

- select the note icon in any document search results
- select “Events” in the lower Notes History screen
- this then brings up a screen showing the full history of edits to that note
- select “Close” when done
Using Help

Each screen has Help available which can be accessed on the right hand side of each Screen under the Main Menu.

To use on-line help: Click on show Help. The Help text will be displayed on screen.

Click Hide Help to undo.

System Requirements

For the most reliable and error free experience using the ECM Viewpoint service we recommend the following:

- High speed Internet access
- One of the following tested Web browsers;
  - IE 7.0 on Windows XP SP3
  - IE 8.0 on Windows 7
  - Firefox 3.6.6 on Windows XP SP3
  - Chrome 9.0 on Windows XP SP3
  - Safari 4.0.5 on Apple OSX 10.5.6
  - Safari 5.0.3 on Apple OSX 10.5.8

- One of the following tested PDF viewers;
  - Acrobat Reader 8.0
If you are using a Web browser that is not listed above, a message will be displayed advising you that the Browser is not officially supported. You will not be prevented from using the service; however, you may find that your experience using the service is unsatisfactory. We strongly advise the use of one of the Web browsers listed above.
University of Queensland Specific Configurations

The following section describes the unique configuration prepared for the University of Queensland.

Login

Login Directly via Web Browser

Go to the web address https://viewpoint.computershare.com/UQ by typing the address into the address bar of your web browser and pressing ‘enter’

You will be taken to the site and presented with a login screen
Enter your allocated User ID and Password
Click “Login”

Forgotten Password

All password resets are to be requested with Accounts Payable.
# Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>An account belonging to a customer</td>
</tr>
<tr>
<td>Account Number</td>
<td>A unique account identifier</td>
</tr>
<tr>
<td>Customer</td>
<td>A direct customer of University of Queensland and the recipient of the documents</td>
</tr>
<tr>
<td>Customer Number</td>
<td>A unique customer identifier</td>
</tr>
<tr>
<td>Product/Service Type</td>
<td>A type of product or service offered by University of Queensland.</td>
</tr>
<tr>
<td></td>
<td>A product type refers to a specific product that an account/document relates to, for example, a finance or insurance product.</td>
</tr>
<tr>
<td></td>
<td>A service type may refer to a utility industry service for example, water, electricity or gas.</td>
</tr>
<tr>
<td>Intermediary</td>
<td>A body that sits between University of Queensland and their customers who look after a subset of the customers, for example an advisor or agent.</td>
</tr>
<tr>
<td>Intermediary Code</td>
<td>A unique intermediary identifier</td>
</tr>
<tr>
<td>Send Channel</td>
<td>Delivery of invoices, statements, and other communications can be initiated by the production system before storing into the archive, or by the archive after storage. If the delivery is to be initiated after storage into the archive the output channel to deliver via is referred to as the Send Channel.</td>
</tr>
<tr>
<td>Resend Channel</td>
<td>The resend channel is the output channel used to send a copy of the stored document. Resends are usually initiated by call centre or administrative staff in response to a Customer request.</td>
</tr>
</tbody>
</table>
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