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TRAVEL EXPRESS USER MANUAL

ATTACHING SCANNED DOCUMENTS

INTRODUCTION

You can attach scanned documents to travel requests or vouchers when the request or voucher is in process in the Travel Express application. However, once uploaded, attachments cannot be deleted.

If a voucher has been 'sent to STARS' (a 'processed voucher') **and** had a document attached, you can add more attachments.

Documents must be scanned at your agency or agency field location and saved on a local or network hard drive. You must then browse for and upload the scanned files into the application.

You can upload file types with the following extensions: .pdf, .jpg, .gif, .bmp, .png, .tif, .tiff. The maximum size of file that can be uploaded is 4MB.

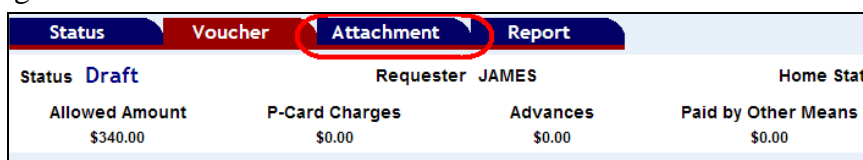
OPEN A REQUEST OR VOUCHER

1. If the request or voucher is open, click the **Attachment** tab (see Create an Attachment below).
2. If the request or voucher is not open, begin at the Travel Express main menu and select the **Requester/Traveler Menu**, and then select **View/Edit Request** or **View/Edit Voucher**.
3. Click **Select** next to the request or voucher.
4. To open a voucher that has been sent to STARS, begin at the Travel Express main menu and open the **Processed Document** menu. Select **Processed Voucher**. Click the **Atch** icon to open the Attachment screen.

CREATE AN ATTACHMENT

1. For either travel requests or vouchers, click the **Attachment** tab. For a **Processed Voucher**, click the attachment icon.

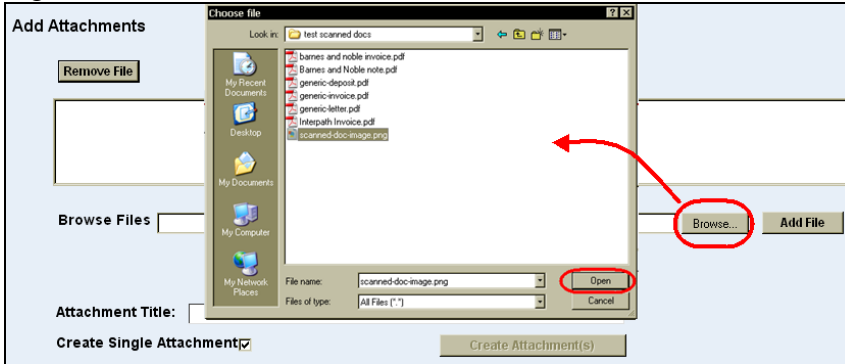
Figure 1 - Attachment tab



Status	Voucher	Attachment	Report
Status Draft		Requester JAMES	Home Stat
Allowed Amount \$340.00	P-Card Charges \$0.00	Advances \$0.00	Paid by Other Means \$0.00

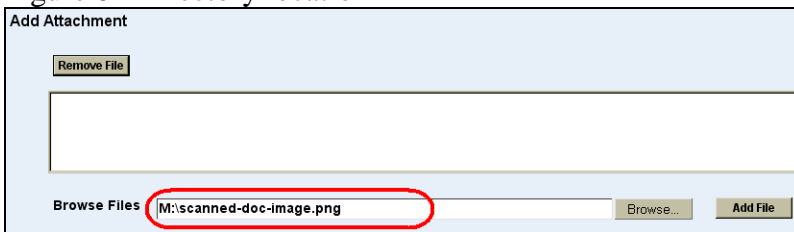
2. Click **Browse** to locate your scanned document file. Valid types include files with the following extensions: .pdf, .jpg, .gif, .bmp, .png, .tif, .tiff. (The file extension .jpeg will not work.) The maximum size of file that can be uploaded is 4MB.

Figure 7 - Browse for scanned document



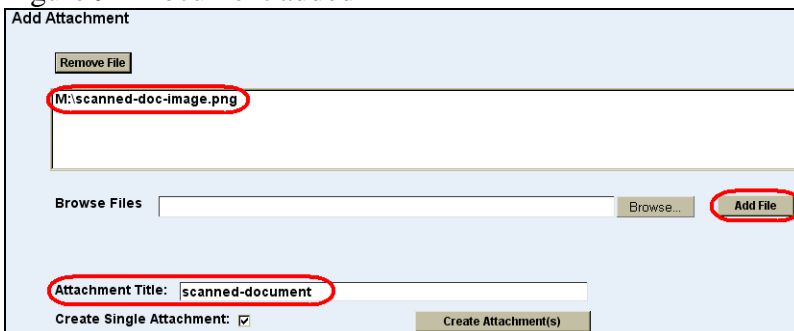
3. Highlight the scanned document file and click **Open**. The directory location of the document will appear in the **Browse Files** field.

Figure 8 –Directory location



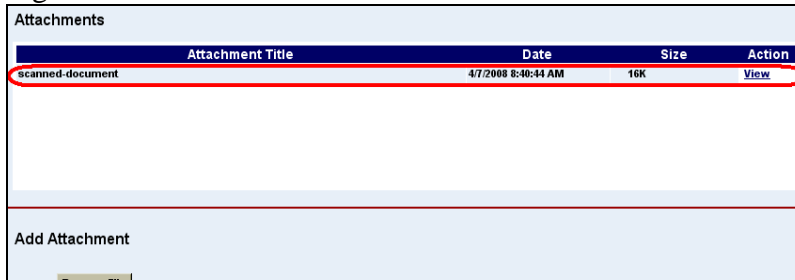
4. Click **Add File**. The document will be added to a queue. The filename (without the extension) of the scanned document will be automatically entered in the **Attachment Title** field.

Figure 9 - Document added



5. If desired, change the **Attachment Title** to something more meaningful for the document. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****. Otherwise, leave the default title based on the file name.
6. When adding only one document, leave **Create Single Attachment** checked. If you have changed the **Attachment Title**, this will apply the change. For more than one file, see [Attaching Multiple Documents](#) section below.
7. Click **Create Attachment(s)**. The document will appear in the **Attachments** area. (Click **View** if you want to view the attachment.) Once uploaded, attachments cannot be deleted by the user.

Figure 10 - Attached document with View



Attachment Title	Date	Size	Action
scanned-document	4/7/2008 8:46:44 AM	16K	View

Add Attachment

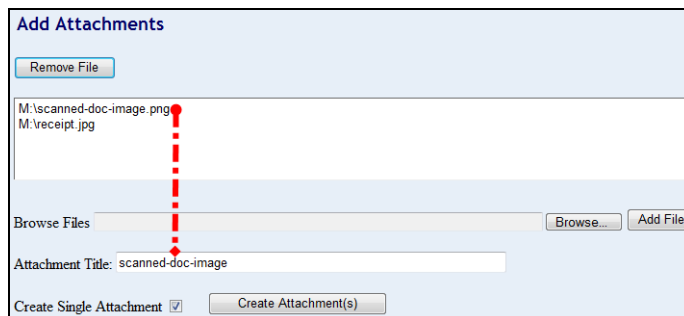
8. Click **Back** to return to the travel request or voucher.

ATTACH MULTIPLE DOCUMENTS

You can create attachments from multiple scanned documents either one at a time or all at once. To add multiple documents, each with unique Document Titles, add and create the attachments one at a time as previously described.

1. Repeat the steps above to add a second document to the queue. Note the **Attachment Title** keeps the name from the first document added. This can be changed.
2. Continue adding documents as needed.

Figure 11 - Adding multiple documents



Add Attachments

Remove File

M:\scanned-doc-image.png
M:\receipt.jpg

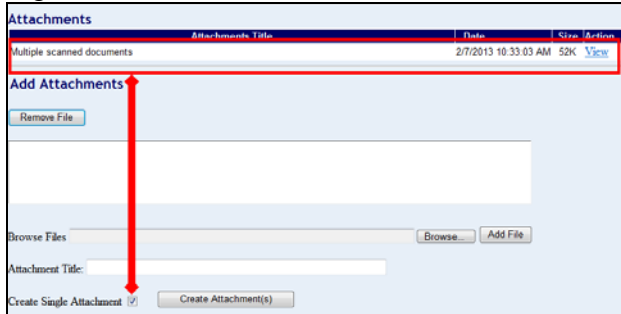
Browse Files

Attachment Title: scanned-doc-image

Create Single Attachment

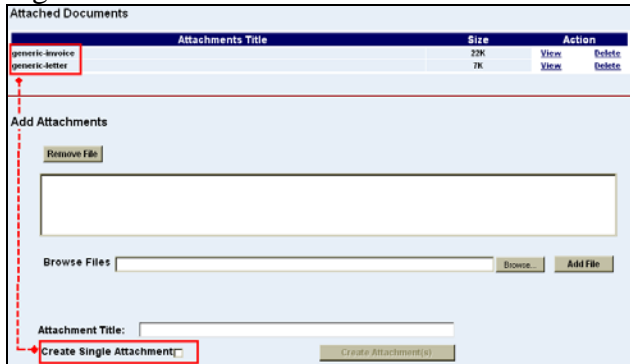
3. The **Create Single Attachment** check box will affect only the **Attachment Title** of the documents:
 - a. If you check the **Create Single Attachment** checkbox and click **Create Attachment(s)**, all of the documents will have the *same Attachment Title* based on the title you enter, or on the filename of the first document added.

Figure 12 - Same document title



- b. If you uncheck the **Create Single Attachment** check box and click **Create Attachment(s)**, the documents will have *different Attachment Titles* based on their filenames – the **Attachment Title** will not be used.

Figure 13 - Different document titles



4. Once uploaded, attachments cannot be deleted by the user. Click **Back** to return to the travel request or voucher.

ERRORS WHEN ADDING A FILE

If you receive a message:

- Page cannot be displayed
- Cannot access a closed file
- Server error
- Maximum Request Length Exceeded

Your scanned document file size may be too large. The maximum size of file that you can upload is 4MB.

Therefore, scan a large document in small batches and add them as multiple attachments (described above).

You could also use your scanner/scanning software to reduce the file size, or check your scan settings for resolution and file format. If you still get an error message after reducing the file size, trying rebooting your computer to clear any cached memory and then try again.

SCANNER SETTINGS

Several factors must be considered when scanning documents for your agency, – e.g., the type of scanner or multi-function machine you use and its settings, hard disk storage capacity at your agency, and the type of originals (size and color of paper, size and color of print, etc.). Each agency will need to develop their own best practices appropriate for their environment. Two settings often found on scanners and multi-function machines are:

Resolution: Generally scanners will offer a scanning resolution setting expressed in “dpi” or dots per inch. The lower the setting the smaller the file size, but the worse quality of image produced. With most documents, a setting of 150dpi seems to work well.

File formats: Your particular scanner or and multi-function machines may be capable of producing a variety of file formats (e.g., .pdf, .jpg, .gif, .bmp, .png, .tif, .tiff). For many agencies, .jpg and .pdf work well.

You should test your own equipment to see which resolution and file format settings create the smallest file size with acceptable visual quality.

DOCUMENT RETENTION

Your agency may need to develop document retention rules to determine if copies will be kept by your agency and for how long. Refer to the [State Travel Policy](#) for record retention information. Also refer to the [State Records Center site](#) for record retention information and schedules.