TRAVEL EXPRESS USER MANUAL.. 1

ATTACHING SCANNED DOCUMENTS.. 1

INTRODUCTION 1

OPEN A REQUEST OR VOUCHER 1

CREATE AN ATTACHMENT 1

ATTACH MULTIPLE DOCUMENTS 3

ERRORS WHEN ADDING A FILE 5

SCANNER SETTINGS 5

DOCUMENT RETENTION 5

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. Once attached, you cannot delete attachments.

If a voucher has been ‘sent to STARS’ (a ‘processed voucher’) **and** had a document attached, you can add more attachments. Otherwise you cannot add an attachment to a processed document.

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

You can upload file types with the following extensions: .pdf, .jpg, .gif, .bmp, .png, .tif, .tiff. The maximum size of file that you can attach is 8MB.

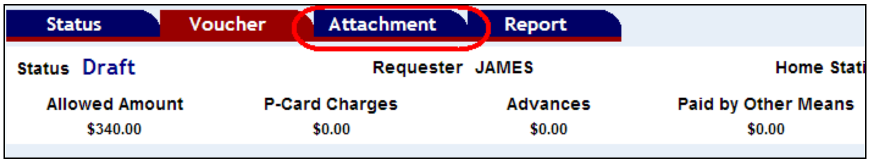
OPEN A REQUEST OR VOUCHER

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. If a voucher has been ‘sent to STARS’ (a ‘processed voucher’) **and** had a document attached, you can add more attachments. Otherwise you cannot add an attachment to a processed document.

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

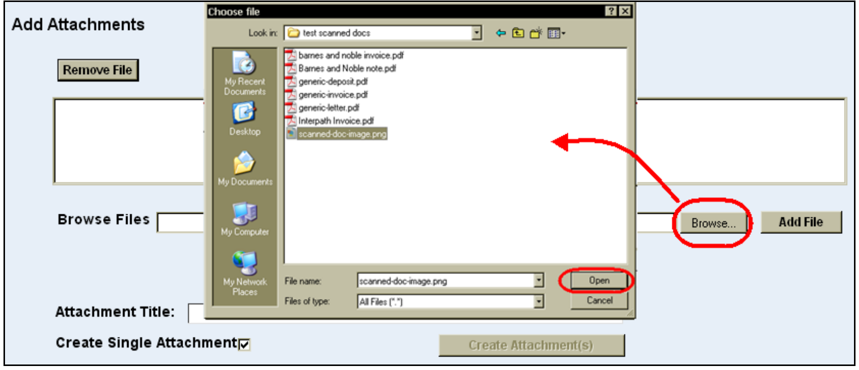

Status
Voucher
Attachment
Report

Status Draft
Requester JAMES
Home Stati

Allowed Amount	P-Card Charges	Advances	Paid by Other Means
$340.00	$0.00	$0.00	$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 you can be attach is 8MB.

Figure 7 - Browse for scanned document


Add Attachments
Remove File
Browse Files
Attachment Title:
Browse...
Add File
Create Attachment(s)
Choose file
My Recent Documents
Desktop
My Documents
My Computer
My Network Places
Open
Cancel

Look in: test scanned docs

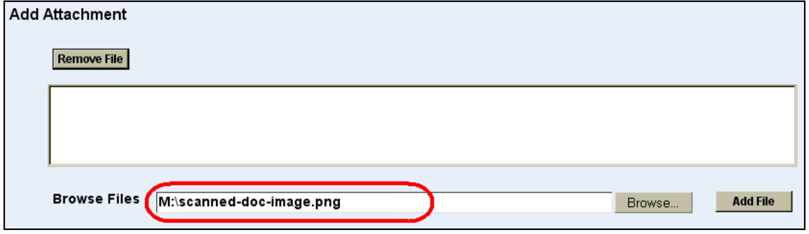
- barnes and noble invoice.pdf
- Barnes and Noble note.pdf
- generic-deposit.pdf
- generic-invoice.pdf
- generic-letter.pdf
- Interpath Invoice.pdf
- scanned-doc-image.png

File name: scanned-doc-image.png
Files of type: All Files (*.*)

Create Single Attachment ☑

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

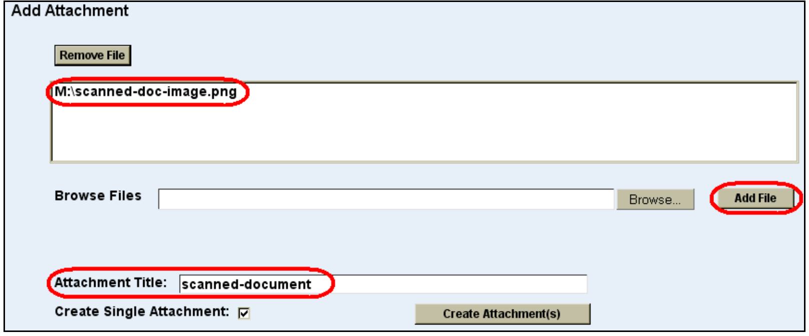
Figure 8 –Directory location


Add Attachment
Remove File
Browse...
Add File

Browse Files M:\scanned-doc-image.png

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



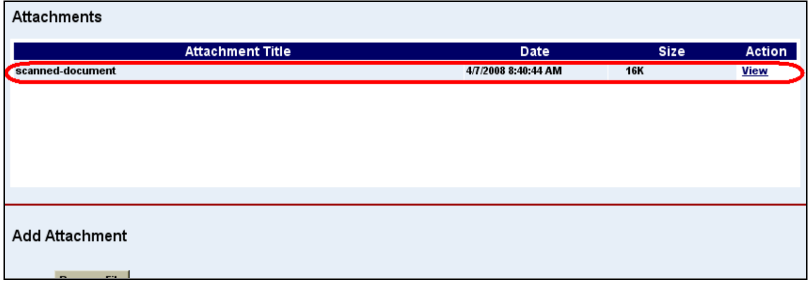
M:\scanned-doc-image.png

Attachment Title: scanned-document

Create Single Attachment: ☑

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 8:40:44 AM	16K	View

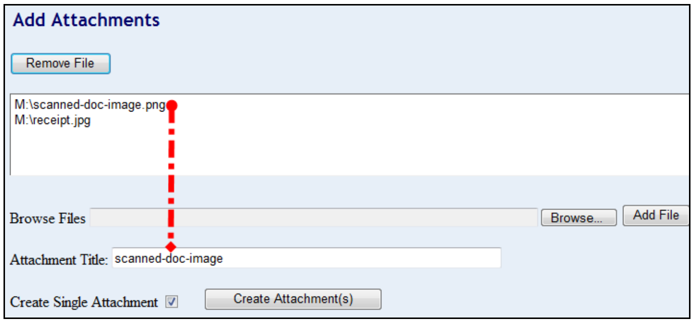
8. Click **Back** to return to the travel request or voucher.

ATTACH MULTIPLE DOCUMENTS

You can add multiple scanned documents in a queue, and then attach them as one document. However, to add multiple documents, each with unique Document Titles, add and create the attachments one at a time as previously described.

1. Add a document as described above, and then repeat the steps 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
Browse Files
Browse...
Add File
Attachment Title:
Create Single Attachment ☑
Create Attachment(s)

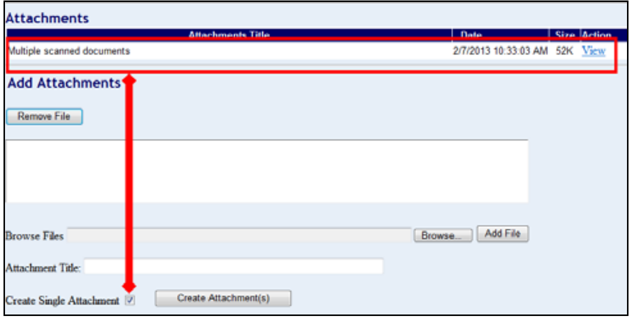
M:\scanned-doc-image.png
M:\receipt.jpg

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.

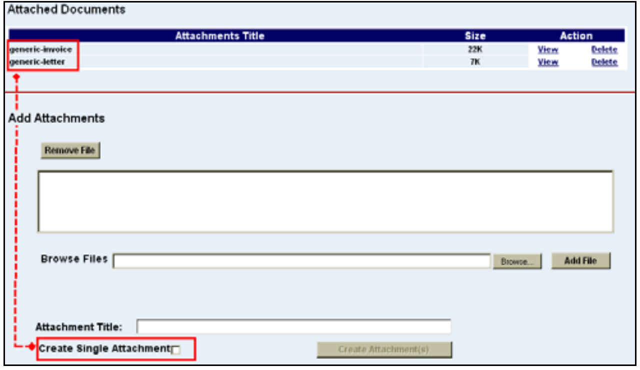
Figure 12 - Same document title


Attachments
Add Attachments
Remove File
Browse Files
Browse...
Add File
Attachment Title:
Create Single Attachment ☑
Create Attachment(s)

Attachments Title	Date	Size	Action
Multiple scanned documents	2/7/2013 10:33:03 AM	52K	View

   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


Attached Documents
Add Attachments
Remove File
Browse Files
Browse...
Add File
Attachment Title:
Create Single Attachment ☐
Create Attachment(s)

Attachments Title	Size	Action	
generic-invoice	22K	View	Delete
generic-letter	7K	View	Delete

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 such as:

- 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 attach is 8MB.

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: You 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. Refer to the State Travel Policy for record retention information. Also refer to the State Records Center site for record retention information and schedules.