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# PAYMENT SERVICES USER MANUAL

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## ATTACHING SCANNED DOCUMENTS

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### INTRODUCTION

You can attach scanned invoices, letters, or any other supporting documents to an invoice in Payment Services. The scanned documents will then be associated with the invoice for approvers, auditors, or managers to view online.

Valid scanned file types include .pdf, .jpg, .gif, .bmp, .png, .tif, and .tiff. (The file extension .jpeg will not work.) The maximum size of file that can be uploaded is 4MB. Once uploaded, you cannot edit or delete attachments – contact the [dsahelp@scs.idaho.gov](mailto:dsahelp@scs.idaho.gov) if you need an attachment deleted.

Scanned documents can be attached to the invoice any time. Thus, approvers or other higher level users can attach documents as the documents become available during the invoice payment process.

### Records Retention

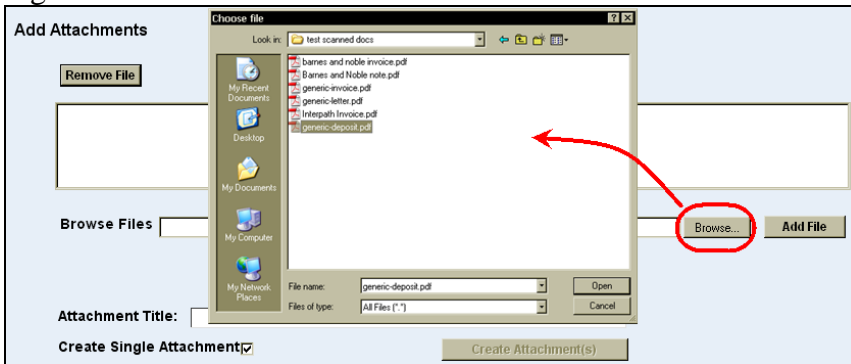
Your agency may need to develop document retention rules to determine if copies will be kept by your agency as well and for how long. Refer to the [State Records Center site](#) for record retention information.

### ATTACH A SINGLE DOCUMENT

Since you add an attachment to a saved invoice, you must open an invoice in the **Status**, **Distribute**, **Approval**, or **Multi Proc** screen and then click the **Attachments** tab.

1. Click the **Attachments** tab by one of the following methods:
  - a. Immediately after saving the invoice on the **Invoice** screen, click the **Attachments** tab. (The invoice does not need to be authorized.)
  - b. If you are working on an invoice in any another screen, click the **Attachments** tab.
  - c. Open the invoice from the **Status** screen. (See the Status tab documentation for details.) Then click the **Attachments** tab.
2. Click **Browse** to locate the scanned document file. Valid file types include .pdf, .jpg, .gif, .bmp, .png, .tif, and .tiff. NOTE: When a file is uploaded, Payment Services will automatically convert it to a PDF file.

Figure 1 - Browse for scanned document



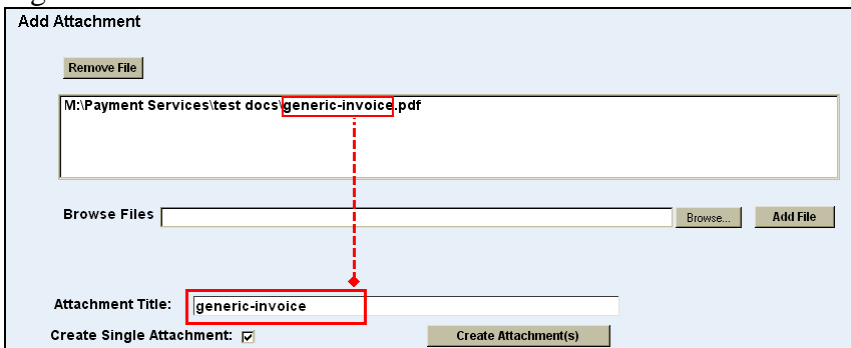
3. Highlight the scanned document file and click **Open**. The directory path of the document will appear in the **Browse Files** field.

Figure 2 – Directory path to document



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

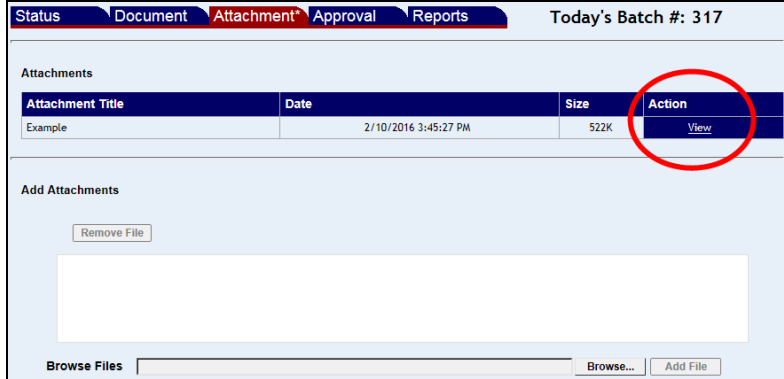
Figure 3 - Document added



5. If desired, change the **Attachment Title** to something more suitable for the document. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and **\**. Otherwise, leave the default title based on the file name.
6. For 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 the [Adding Multiple Invoice Documents](#) section below

7. Click **Create Attachment(s)**. The document will appear in the **Attachments** area. Once attached, the scanned documents are automatically saved. Once uploaded, you cannot delete attachments.

Figure 4 - Attached document



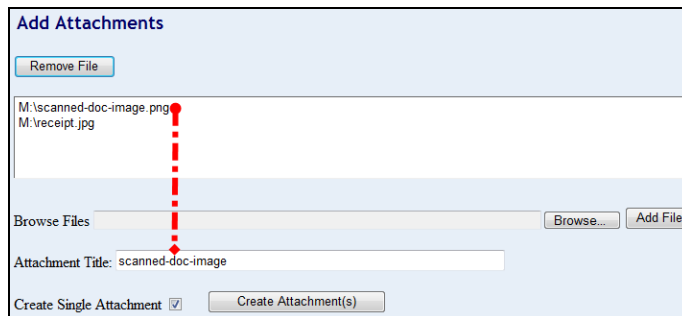
8. If desired, click **View** to open and verify the document.

## 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.

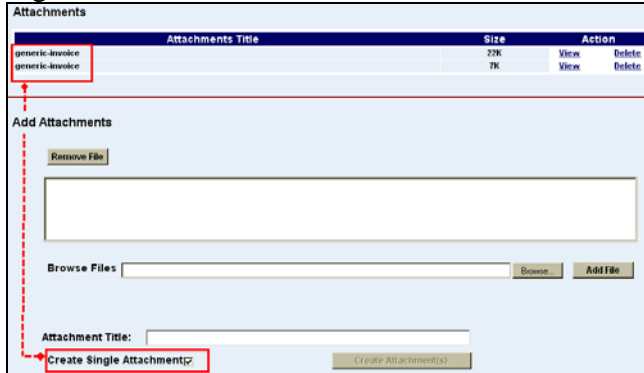
1. Repeat the steps above to add a second document to the queue. Note the **Attachment Title** keeps the name from the first document added. You can change this title.
2. Continue adding documents as needed.

Figure 11 - Adding multiple documents



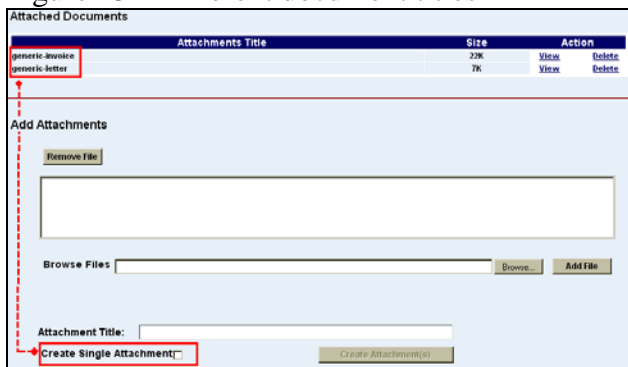
3. The **Create Single Attachment** check box will affect the **Attachment Title** of the attached documents:
  - a. If you check the **Create Single Attachment** checkbox and click **Create Attachment(s)**, all of the documents will upload with the *same Attachment Title* based on the filename of the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

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.

Figure 13 - Different document titles



Once attached, the scanned documents cannot be deleted by the user.

## ATTACH DOCUMENTS TO PROCESSED INVOICES THAT HAVE BEEN SENT TO STARS

To attach an invoice that has been processed and sent to STARS:

1. If not on the Invoice screen, click the **Invoice** tab.
2. Click the asterisk next to **Invoice #** or place the cursor in the **Invoice #** field and press F3.
3. Enter any combination of search criteria – vendor name, business name, city, invoice number, etc. in the dialog box. You can enter just the first part of your search criteria, e.g., a vendor name or invoice number.
4. Click **Find**. Use the scroll bar at the bottom of the search results to view all of the column headers (e.g., **Address**, **Status**, etc). Click the column headers of the search results to sort the list, if needed.

5. Click **Select** next to the desired invoice number to open it.
6. Click the **Attachments** tab.
7. Add the attachment files as described above for either single or multiple documents depending on what you need.

## VIEW ATTACHED DOCUMENTS

To view an attached document from the **Approval** screen, click the **Attachments** tab and click **View** next to the attachments. A separate browser window will open to view the attachment.

You can view attached documents from either the **Status** screen, the **Multi Proc** screen, or the **Processed Invoice** screen. An icon under the **Atch** column identifies the invoices with attachments. If none of the invoices has attachments, the **Atch** column will not be displayed.

To view attachments from the **Status** or **Multi Proc** screen:

1. Click the **Atch** icon next to the invoice either the **Status** screen or the **Multi Proc** screen.

Figure – Status Attachment icon

The screenshot shows the 'Status' screen with a navigation bar containing 'Status', 'Invoice', 'Attachments', 'Distribute', 'Approval', 'Multi Proc', and 'Reports'. Below the navigation bar are search filters for Invoice Date, Payment Date, Status, Payment Date Range, Invoice #, Vendor Name, Vendor Business, Acct, Doc, PO#, and Group. A 'Find' button is located to the right of the Status filter. Below the filters is a table with the following columns: 'Atch', 'Vendor Name', 'Invoice #', 'Total Amount', and 'Invoice Date'. The 'Atch' column is highlighted with a red box. The table contains three rows of data:

Atch	Vendor Name	Invoice #	Total Amount	Invoice Date
Select [Atch icon]	ALBION TELEPHONE COMPANY	301 CEDAR AVE	\$125.61	03/01/2015
Select [Atch icon]	CITY OF DRIGGS	820 VALLEY CEN	\$196.40	02/28/2015
Select [Atch icon]	CITY OF RIGBY	380 COMMUNITY	\$327.00	02/26/2015

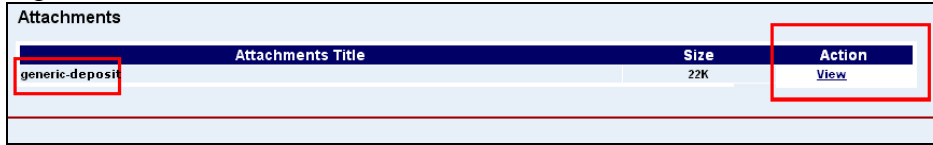
Figure - Multi Proc Attachment icon

The screenshot shows the 'Multi Proc' screen with a navigation bar containing 'Status', 'Invoice', 'Attachments', 'Distribute', 'Approval', 'Multi Proc', and 'Reports'. Below the navigation bar are search filters for Range (This Year), dates (01/01/2015 to 12/31/2015), and Group. A 'Find' button is located to the right of the date filters. Below the filters is a table with the following columns: 'Invoice #', 'Atch', 'Auth', 'Dist', 'Bureau', 'Division', 'Fiscal', 'PmtDate', and 'Amt'. The 'Atch' column is highlighted with a red box. The table contains three rows of data:

Invoice #	Atch	Auth	Dist	Bureau	Division	Fiscal	PmtDate	Amt
Select 030115	[Atch icon]	✓	✓	✓			03/03/2015	\$3,000.00
Select 030315	[Atch icon]	✓					03/03/2015	\$3,000.00
Select 03032015	[Atch icon]	✓	✓				03/03/2015	\$3,000.00

2. The **Attachments** screen will open. Click **View** next to the attachment you want to view. (The viewed attachment can be printed.) NOTE: An attached document will open as a PDF document.

Figure 5 - View attachments



Attachments Title	Size	Action
generic-deposit	22K	View

## 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 uploaded 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 ).

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 as well and for how long. Refer to the [State Records Center site](#) for record retention information.