
P-CARD USER MANUAL.....	1
ATTACHING SCANNED DOCUMENTS.....	1
INTRODUCTION	1
ATTACH A SCANNED DOCUMENT	1
ATTACH MULTIPLE DOCUMENTS	3
TRANSMITTALS WITH ATTACHMENTS	5
ERRORS WHEN ADDING A FILE	5
SCANNER SETTINGS	6
DOCUMENT RETENTION	6

P-CARD USER MANUAL

ATTACHING SCANNED DOCUMENTS

INTRODUCTION

You can scan receipts, invoices, etc., and attach them to the transmittal. The scanned documents will be saved in P-Card for approvers, auditors, or managers to view online. You can also documents to a transmittal even if it has been sent to STARS.

You can attach scanned documents one at a time, or add multiple documents in a queue and then attach them as one document. Valid scanned file types include files with the following extensions: .pdf, .jpg, .gif, .bmp, .png, .tif, .tiff. The maximum size of file that you can attach is 8MB. Once attached, you cannot delete attachments.

ATTACH A SCANNED DOCUMENT

1. Open the **Attachments** section according to whether you are a Verifier or an Approver:
 - **Verifier:** Click **Create Trans & Atch**. The **Attachments** section will be displayed below the transactions.

This creates a transmittal (“**Create Trans**”) in order to attach (“**Atch**”) documents to it. If you click this, you must attach a file and submit the transmittal.

If there are any remaining unverified transactions, they will be locked (unable to be verified) until the initial transmittal is submitted by clicking on the **Submit & Print** button.

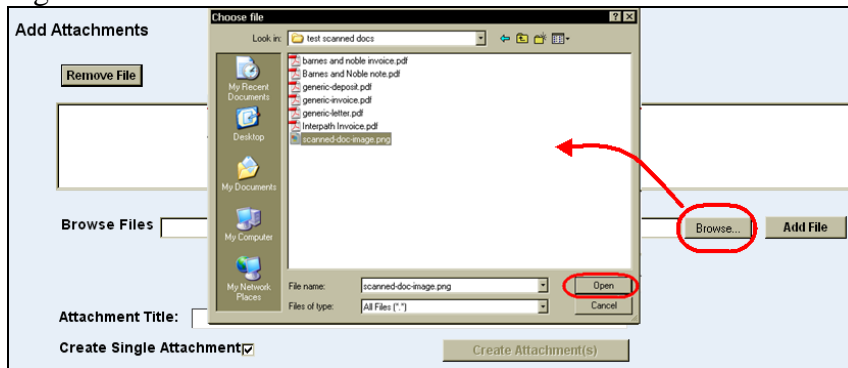
Figure 1 – Verifier: Create Trans & Atch

The screenshot shows a web application interface for a P-Card. At the top, there are dropdown menus for 'Card Holder:' and 'Credit Cards:', both set to 'CAL'. Below this is a table with columns: Split, Ve, Pe, TranDate, Amount, Vendor, VendorID, Sfx, PCA*, INDEX, BFY, Sub*, DTI, 1099, STARS Vend*, Sfx, CI, Grant*, Ph, Project*. Two rows of data are visible, both with 'Ve' checked. Below the table are buttons for 'Undo Changes', 'Save Changes', and 'Create Trans & Atch' (circled in red), and 'Submit & Print'.

Split	Ve	Pe	TranDate	Amount	Vendor	VendorID	Sfx	PCA*	INDEX	BFY	Sub*	DTI	1099	STARS Vend*	Sfx	CI	Grant*	Ph	Project*
⌕	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2/1/2016	108.70	ALASKA AIR 02			23013		2016	5381						23013	16	PUBSAF
⌕	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2/1/2016	300.00	ALASKA AIR 02			23013		2016	5381						23013	16	PUBSAF

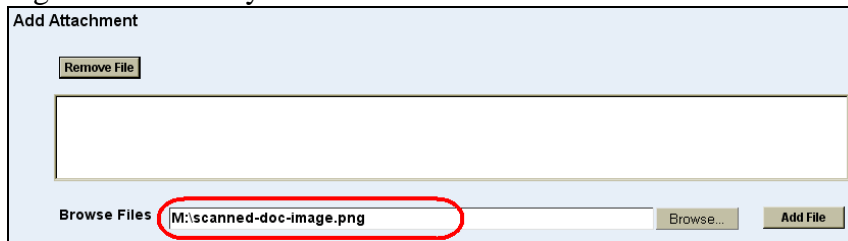
- **Approver:** Select a transmittal from the **Select Transmittal** menu or enter a transmittal number in the **Enter Transmittal** field and press ENTER. The **Attachments** section will be displayed below the transactions.
- 2. In the **Attachments** section, click **Browse** to locate your scanned document file. Valid types include files with the following extensions: .pdf, .jpg, .gif, .bmp, .png, .tif, .tiff. (The file extension .jpeg will not work.).

Figure 2 - Browse for scanned document



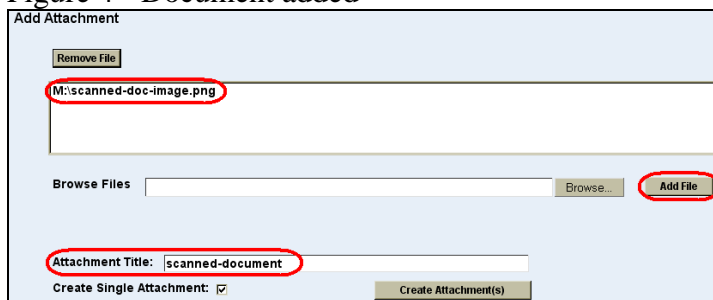
- 3. Highlight the scanned document file and click **Open**. The directory location of the document will appear in the **Browse Files** field.

Figure 3 –Directory location



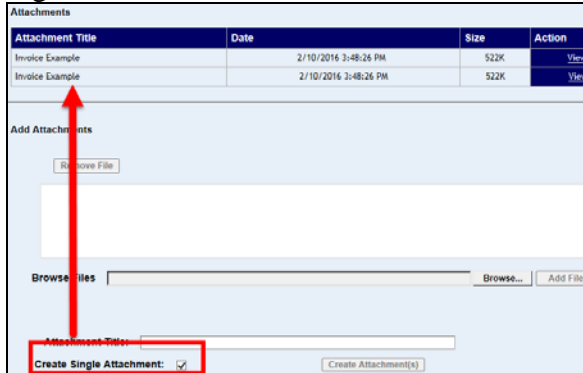
- 4. Click **Add File**. The document will be added to a queue. The filename (without the extension) of the scanned document will be automatically entered in the **Attachment Title** field.

Figure 4 - Document added



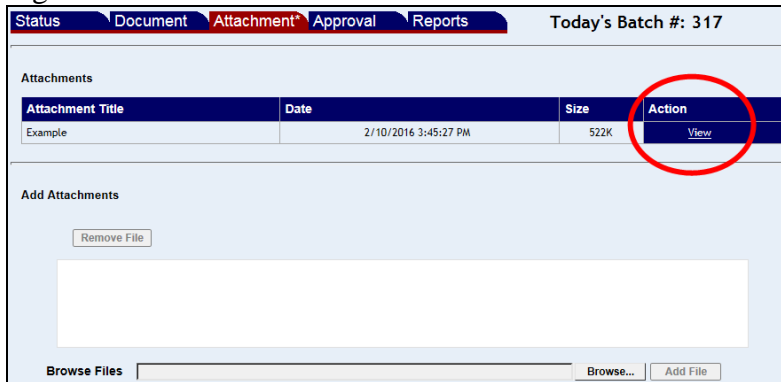
5. If desired, change the **Attachment Title** to something more descriptive. Otherwise, leave the default title that is based on the file name.
6. For only one document or set of documents, leave the default **Create Single Attachment** checked. If adding a set of documents, all of the documents will have the *same Attachment Title* of the *first* document added. To add multiple documents with different titles, see the [Attaching Multiple Documents](#) section below.

Figure 7 - Same document title



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.
8. As a Verifier, click **Submit & Print**. As an Approver, click **Reprint Transmittal**.

Figure 5 - Attached document with View



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 as many documents as needed.

Figure 6 - Adding multiple documents

The screenshot shows the 'Add Attachments' interface. At the top, there is a 'Remove File' button. Below it is a text area containing two file paths: 'M:\Payment Services\test docs\generic-invoice.pdf' and 'M:\Payment Services\test docs\generic-letter.pdf'. A red dashed box highlights the first file path. Below the text area is a 'Browse Files' input field with 'Browse...' and 'Add File' buttons. At the bottom, the 'Attachment Title' field is set to 'generic-invoice', with a red dashed box around it and an arrow pointing from the first file path above. The 'Create Single Attachment' checkbox is checked, and the 'Create Attachment(s)' button is visible.

3. Uncheck the **Create Single Attachment** check box, click **Create Attachment(s)**, and the documents will have *different Attachment Titles* based on their filenames.

Figure 8 - Different document titles

The screenshot shows the 'Attachments' table and the 'Add Attachments' form. The table has columns for 'Attachment Title', 'Date', 'Size', and 'Action'. It contains two rows: 'Invoice Example' (2/10/2016 3:48:26 PM, 522K) and 'Example' (2/10/2016 3:48:26 PM, 522K). Below the table is the 'Add Attachments' form, which is identical to Figure 6 but with the 'Create Single Attachment' checkbox unchecked. A red arrow points from the 'Attachment Title' field in the form to the 'Attachment Title' column in the table.

Attachment Title	Date	Size	Action
Invoice Example	2/10/2016 3:48:26 PM	522K	View
Example	2/10/2016 3:48:26 PM	522K	View

TRANSMITTALS WITH ATTACHMENTS

Although attached documents will not print automatically when you print the transmittal, the transmittal will include a note that there are scanned documents associated with it.

Figure 2 - Attachments note

STATE OF IDAHO USA

Agency: 285 Department of Juvenile Corrections
 Date: 2/26/2009 3:09:22 PM Reprint By: HERTER SAM

P-Card Transmittal Number: 18615
 Transmittal Created By: HERTER SAM

Card Holder: BRADY ABELE Date: _____
 Supr: _____ Date: _____
 FSpec: _____ Date: _____
 FinalApp: _____ Date: _____

Tran Date	Amount	Vendor Name	Vendor ID/*STARS Vnd	SFX	1099	PCA	Index	S/O	Dtl	Grant	Ph	Project	Ph	Description	S
1/15/2009	\$179.45	OFFICEMAX CTT*IN#197921 NAPERVILLE IL	020100990				36110		5410						N

* Scanned documents are available for this transmittal

Page 1 of 1

Click the **View** link next to a scanned document and print it. All attachments are stored as PDFs and can be printed or saved.

Figure 3 - View to print

Enter Transmittal: 25025 : HILL or Select Transmittal: 25025: HILL

Processed Sort TM# Name
 Date Range: _____ to _____

TranDate	Amount	Vendor	VendorID	Sfx	INDEX*	PCA	BFY	Sub	Dtl	1099	STARS Vnd	Sfx	CI	Grant
1/17/2016	12.98	AMAZON MKTPLACE PMTS	20		4413	06000	2016	5410			91	00		ED14
1/17/2016	12.98	AMAZON MKTPLACE PMTS	20		1040	06000	2016	5410			91	00		

Attachments

Attachment Title	Date	Size	Action
Example	2/22/2016 8:15:23 AM	522K	View

ERRORS WHEN ADDING A FILE

If you receive a message, “Page cannot be displayed”, “Cannot access a closed file”, “Server error”, or “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: 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. Refer to the [State Records Center site](#) for record retention information.