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# PURCHASING USER MANUAL

## ATTACHING SCANNED DOCUMENTS

### INTRODUCTION

You can attach scanned documents to requisitions, requisition line items, purchase orders, or purchase order line items using the attachment icon. 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. Valid scanned file types include: .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. Once a scanned document is attached, it cannot be deleted.

### CREATE AN ATTACHMENT

1. Click the attachment icon appropriate for your needs:
  - **Req Atch** or **PO Atch** – for attachments associated with the requisition or purchase order in general.
  - **Atch** – line item attachments specific to the line item.

Figure 1 - Requisition attachments

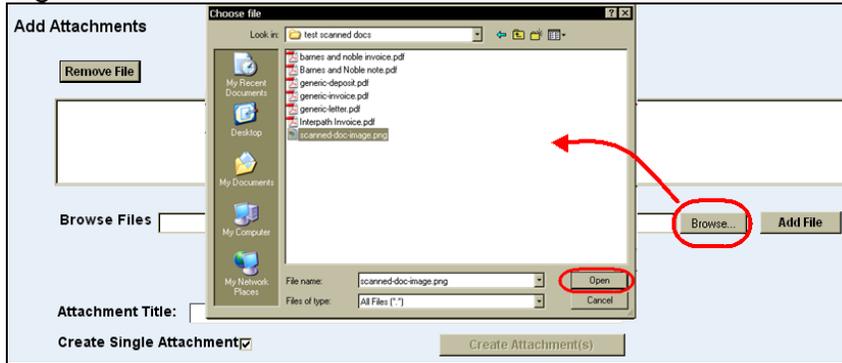
Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Workflow
	<input checked="" type="checkbox"/>				0	-Select UM-	0.00	0.00	-Select Workflow-

Figure 2 - Purchase order attachments

Sel	Req #	Need By	Note	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal
<input checked="" type="checkbox"/>	DSA07003	12/07/2007		<input checked="" type="checkbox"/>	Assigned to PO	xy7823-aa	Business cards	1	Box	15.00	15.00

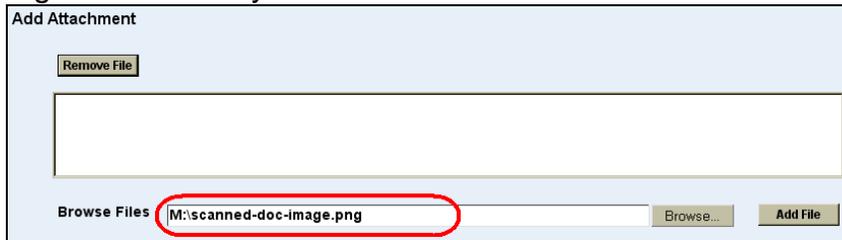
2. Click **Browse** to locate your scanned document file. Valid types include files with the following extensions: .pdf, .jpg, .gif, .bmp, .png, .tif, .tiff. (The file extension .jpeg will not work.) The maximum size of file that can be uploaded is 4MB.

Figure 3 - Browse for scanned document



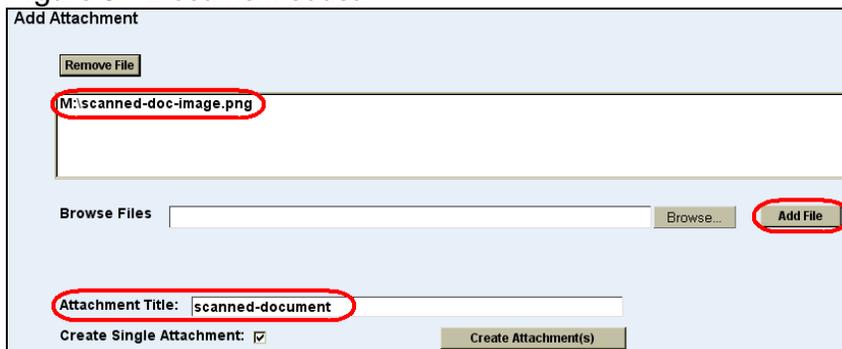
3. Highlight the scanned document file and click **Open**. The directory location of the document will appear in the **Browse Files** field.

Figure 4 –Directory location



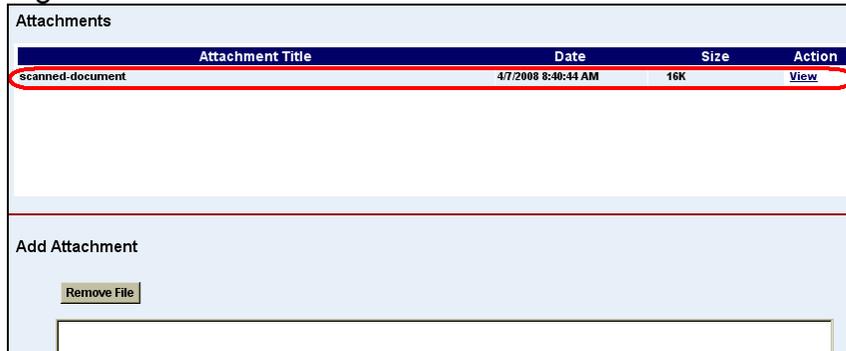
4. Click **Add File**. The document will be added to a queue. The filename (without the extension) of the scanned document will be automatically entered in the **Attachment Title** field.

Figure 5 - Document added



5. If desired, change the **Attachment Title** to something more suitable for the document. 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 [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 a scanned document is attached, it cannot be deleted.

Figure 6 - Attached document with View

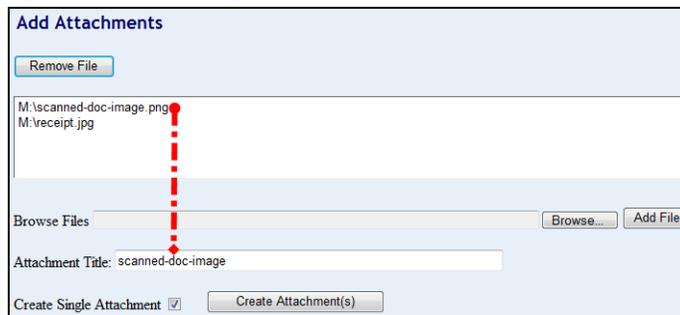


## ATTACHING MULTIPLE DOCUMENTS

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.

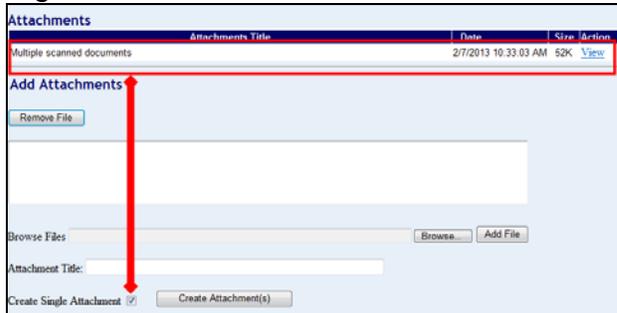
1. Repeat the steps above to add a second document to the queue. Note the **Attachment Title** keeps the name from the first document added. This can be changed.
2. Continue adding documents as needed.

Figure 11 - Adding multiple documents



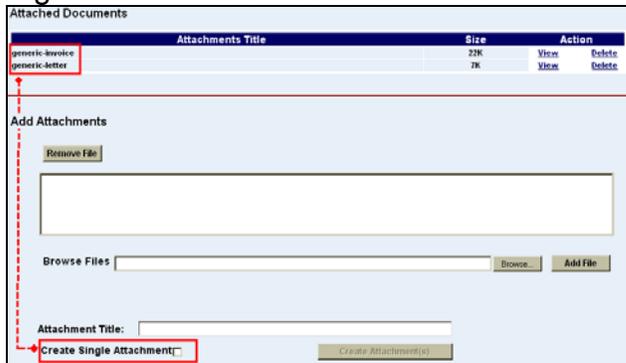
3. The **Create Single Attachment** check box will affect the **Attachment Title** of the attached documents:
  - a. If you check the **Create Single Attachment** checkbox and click **Create Attachment(s)**, all of the documents will upload as one document and have the *same Attachment Title* based on 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



## 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 can be uploaded is 4MB. Use your scanner/scanning software to reduce the file size or check your scan settings for resolution and file format. Scan pages of multi-page document individually or in groups. 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.