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BUDGETARY USER MANUAL

ATTACHING SCANNED DOCUMENTS

INTRODUCTION

You can attach scanned documents to budgetary documents at any time after a document is saved in the application.

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, and .tiff. (The file extension .jpeg will not work.) The maximum size of file that can be uploaded is 4MB. Once uploaded, attachments cannot be deleted by the user.

ATTACH A SCANNED DOCUMENT

1. Click the **Attachment** tab.
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.)

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

The screenshot shows the 'Add Attachment' form. At the top left is a 'Remove File' button. Below it is a large empty text area. At the bottom, there is a 'Browse Files' label followed by a text input field containing 'M:\scanned-doc-image.png', a 'Browse...' button, and an 'Add File' button. The text input field is circled in red.

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

The screenshot shows the 'Add Attachment' form. The 'Browse Files' text input field now contains 'M:\scanned-doc-image.png' and is circled in red. The 'Add File' button is also circled in red. Below the text area, there is an 'Attachment Title' label followed by a text input field containing 'scanned-document', which is also circled in red. At the bottom, there is a 'Create Single Attachment:' checkbox which is checked, and a 'Create Attachment(s)' button.

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 uploaded, attachments cannot be deleted by the user.

Figure 10 - Attached document with View

The screenshot shows the 'Attachments' section of the application. At the top, there are navigation tabs: 'Status', 'Document', 'Attachment', 'Approval', and 'Reports'. To the right, it says 'Today's Batch #: 317'. Below the tabs is a table with the following data:

Attachment Title	Date	Size	Action
Example	2/10/2016 3:45:27 PM	522K	View

The 'View' button in the 'Action' column is circled in red. Below the table is the 'Add Attachments' section, which includes a 'Remove File' button, a large empty text area, and 'Browse Files', 'Browse...', and 'Add File' buttons at the bottom.

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

The screenshot shows the 'Add Attachments' interface. At the top, there is a 'Remove File' button. Below it, a list of files is shown: 'M:\scanned-doc-image.png' and 'M:\receipt.jpg'. A red dashed line points from the first filename to the 'Attachment Title' field, which contains 'scanned-doc-image'. Below the file list, there are 'Browse Files' and 'Add File' buttons. At the bottom, there is a 'Create Single Attachment' checkbox (checked) and a 'Create Attachment(s)' button.

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.

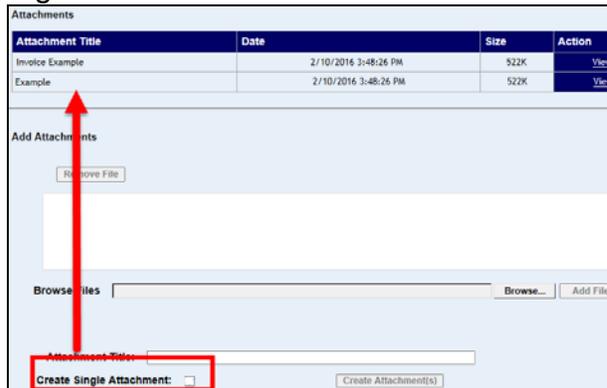
Figure 12 - Same document title

The screenshot shows the 'Attachments' table and the 'Add Attachments' interface. The table has columns for 'Attachment Title', 'Date', 'Size', and 'Action'. It contains two rows, both with the title 'Invoice Example'. A red arrow points from the 'Attachment Title' field in the 'Add Attachments' interface to the table, indicating that the same title is used for both documents. The 'Create Single Attachment' checkbox is checked.

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

Figure 13 - Different document titles



ERRORS WHEN ADDING A LARGE 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). For many agencies, .jpg and .pdf work well.

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.