USED FOR: ♦ **attaching documents/invoices already scanned and saved on your computer or server to a voucher in PeopleSoft. This process is done after you have budget checked your voucher in PeopleSoft.**

PeopleSoft Imaging Facts

- All documents **MUST** be at least **300x300 DPI** (minimum DPI, *dots/inch*)
  - Check scanned image/document first before uploading to PeopleSoft.
  - If document is on thermal paper make a copy of the document ***before*** scanning as thermal papered documents do not scan well.
  - Sometimes if you copy a receipt or invoice first then scan, it will produce a better scanned copy.

- Document Status (See Step 9)
  - Active
  - Inactive

- Maximum size of 60MB per attachment *(Currently attachments are not limited.)*
  - 60MB is rather large, i.e., someone had faxed about 15 pages of documentation at UH and it only was 4MB

- Always check your Image Type (See Step 7)
  - Application/1 = (name of application)/
  - Image/ = (name of document)/

  If document image name is *"oclet-stream"*, it will not open and you will need to inactive it and attach a new copy of image again.
  Always open attachment before and after importing into PeopleSoft to make sure it is a clear and is a readable scanned document.

- Security Sensitive
  - You will need to **black out** the following information before scanning a document: *Social Security Number, Federal ID number, Check Routing Number, Checking Account Number*, and *Credit Card number*.

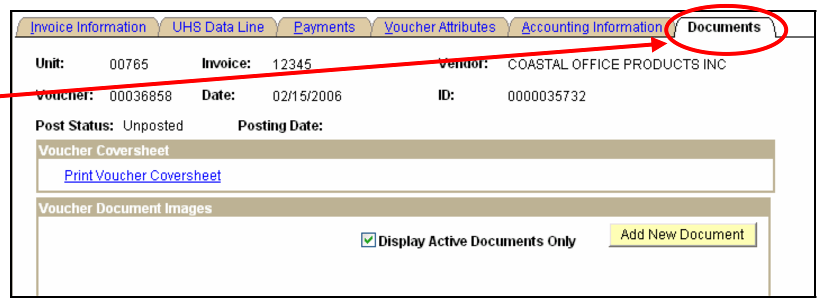
- *****6 Document Types** (Types of document formats that will scan and import into PeopleSoft. Mainly should use PDF and TIFF.)
  - PDF (need Adobe Acrobat for this)
  - TIFF (can be altered)
  - Word
  - Excel
  - Text
  - Rich Text Format
  - *Do **not** use any .jpeg documents.*

- **Documents to be scanned for vouchers:**
  - Invoice – minimum requirements should include remit-to address, description and amount
    - Make necessary adjustments to total due or add notes for backup prior to scanning
  - Telephone bills – make sure to include signed acknowledgements as required in UHV Policy A-16
  - Receipts for reimbursement to employees – refer to above for security sensitive information and thermal papered documents
  - Memo authorizing temporary signature authority.

INSTRUCTIONS

STEP 1: After you have budget checked the voucher:

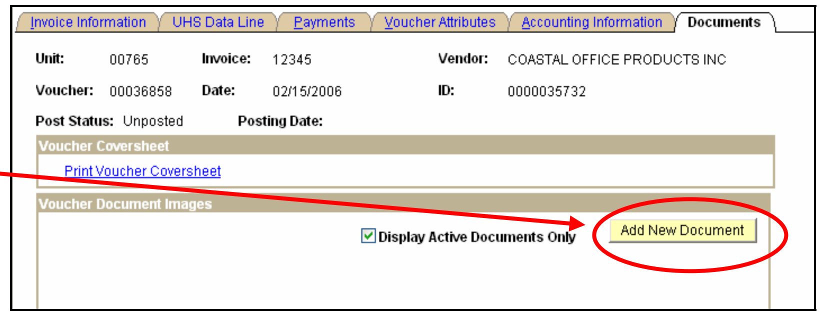
➢Click on the Documents tab.



Under Voucher, Documents Tab:

STEP 2:

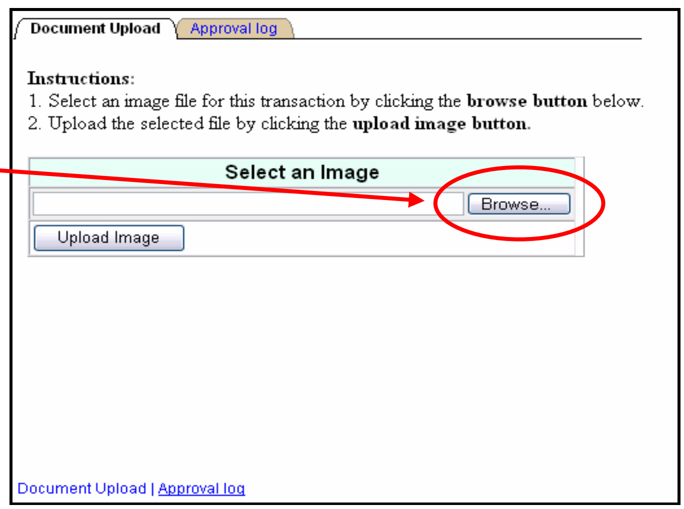
➢Click on the Add New Document button.



Under Document Upload Tab:

STEP 3:

➢Click on the Browse... button.

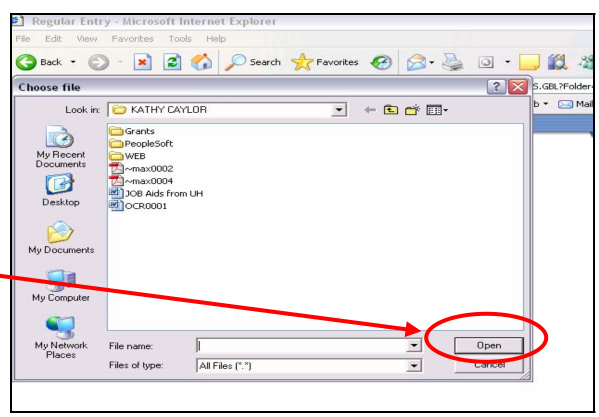


Under Choose File Window:

STEP 4:

➢Select the file that you wish to attach to this voucher.

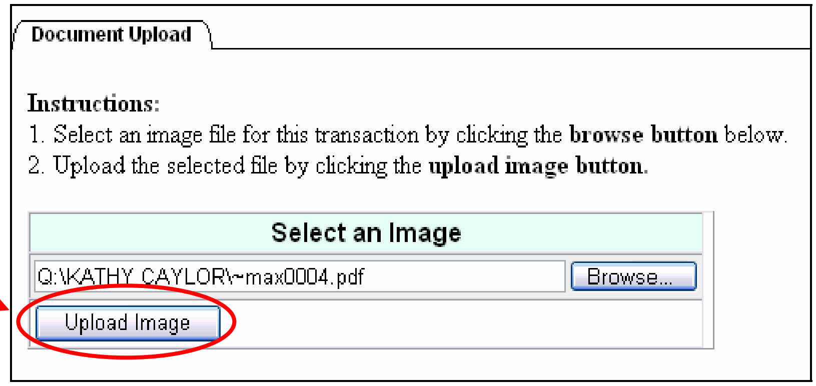
➢Click on the Open button, so that your scanned document selected will be in *Select an Image* of **Document Upload** tab.



Back Under Document Upload Tab:

STEP 5:

➢Click on the **Upload Image** button, after desired file is selected. *(It is very important that you do not click any other buttons on this page.)*

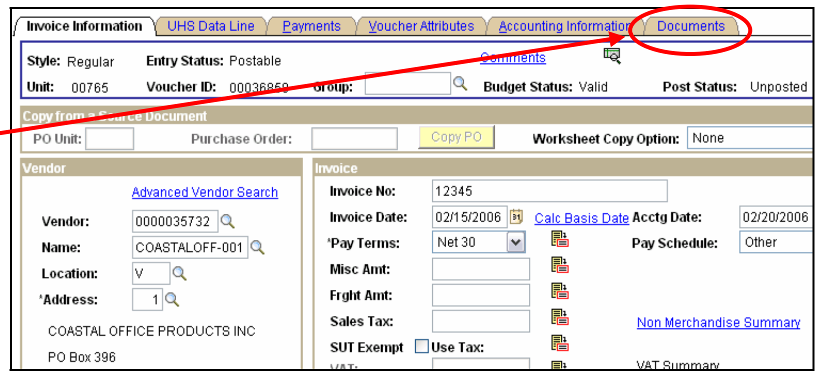


NOTE: *Once you have uploaded the image into a voucher, you will be redirected to the Invoice Information tab. (or in a journal, you will be redirected to the Lines tab).*

STEP 6:

Review the document that was uploaded to make sure it is completely clear and legible.

➢Click on the **Documents** tab.

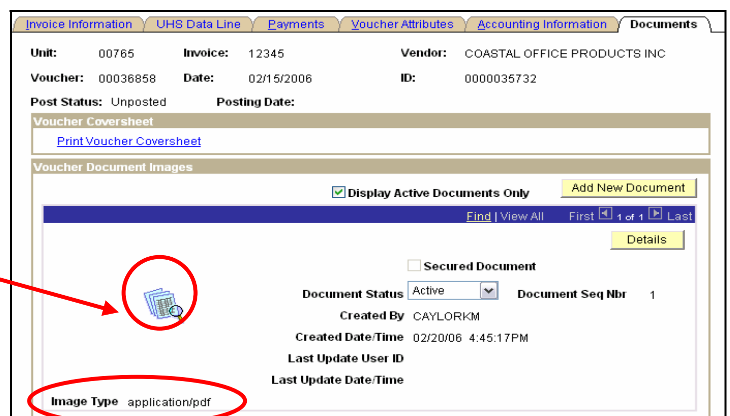


Back Under Voucher, Documents Tab:

STEP 7:

➢Click once on the button in order to view document uploaded.

Note: *The image of the uploaded document will appear in a new window.*



STEP 8:

Always check your *Image Type* as should have a name of:

Application/ = (name of application)/
or Image/ = (name of document)/

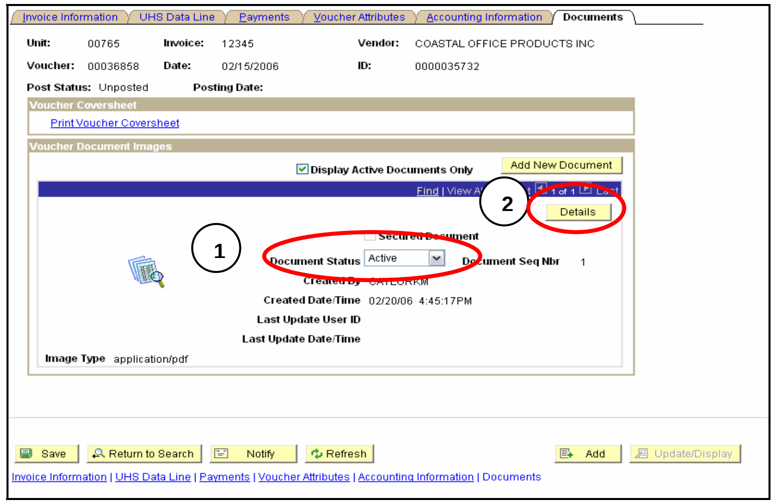
NOTE: *If the image name is "oclet-stream/", it will not open and you will need to inactive it and attach a new copy of the image again.*

STEP 9:

1. **Document status** defaults to *Active*.

   If a document was uploaded by mistake or will be replaced by another document, change the **Document status** to *Inactive* and click on the Save button. Then, upload new or correct file beginning with Step 2.

2. You can click the Details button to see additional information about the uploaded document.



STEP 10:

The **Voucher Imaging Detail Page** will tell you who uploaded the document and when any updates were made to the document *(i.e., changed from active to inactive).*