

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

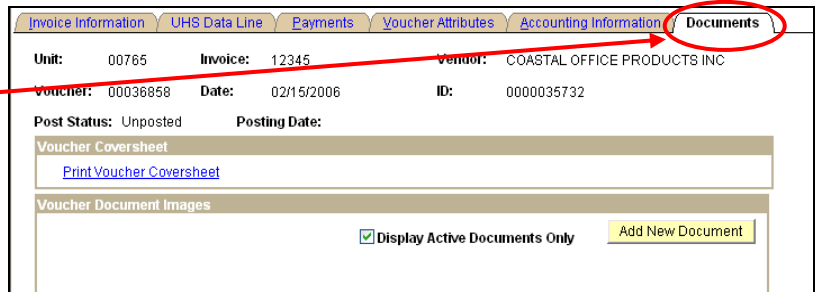
- All documents **MUST** be at least **300x300 DPI** (minimum DPI, *dots/inch*)
 - Check scanned image/document first before uploading to PeopleSoft.
 - If document is on thermal paper make a copy of the document **before** scanning as thermal papered documents do not scan well.
 - Sometimes if you copy 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 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, Credit Card number, Date of Birth, and Driver's Licence 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.
- **Original invoice, receipts, etc.** will be attached to original-signed voucher and forwarded to Finance for audit.

INSTRUCTIONS

STEP 1: After you have budget checked the voucher:

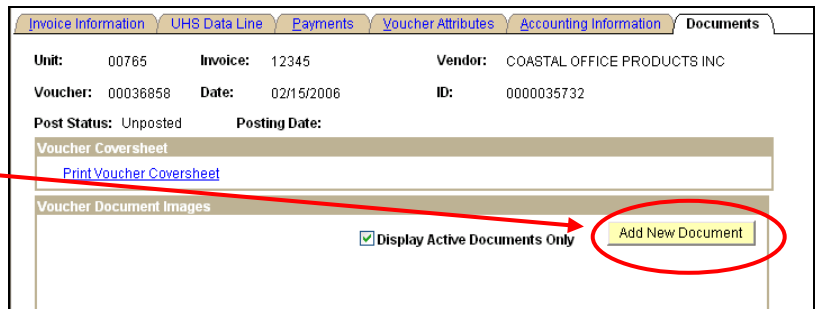
➤ Click on the **Documents** tab.



Under Voucher, Documents Tab:

STEP 2:

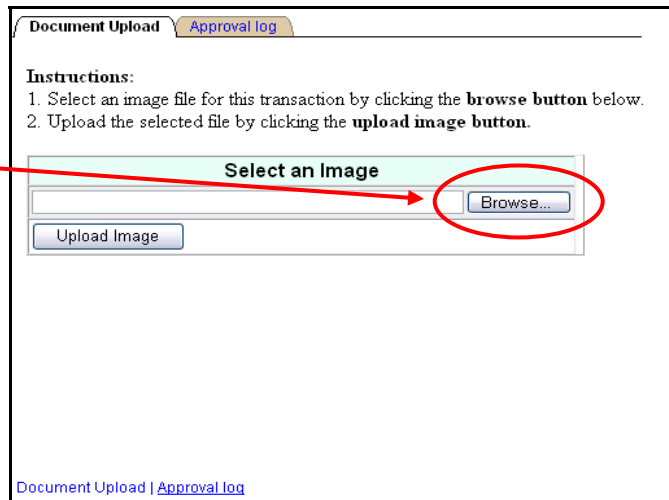
➤ Click on the **Add New Document** button.



Under Document Upload Tab:

STEP 3:

➤ Click on the **Browse...** button.

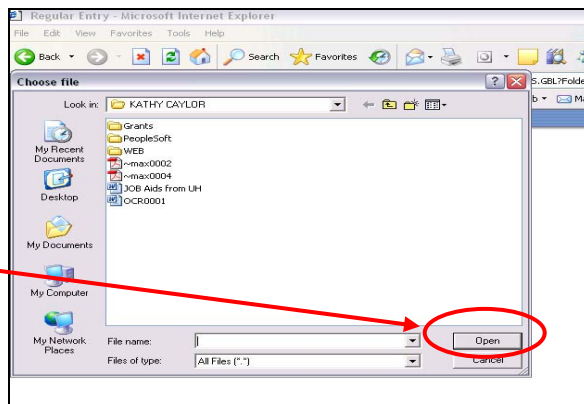


Under Choose File Window:

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.



PEOPLESOFT DOCUMENT IMAGING: Attaching Documents

Back Under Document Upload Tab:

STEP 5:

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

Document Upload

Instructions:

1. Select an image file for this transaction by clicking the **browse** button below.
2. Upload the selected file by clicking the **upload image** button.

Select an Image

Q:\KATHY CAYLOR\~max0004.pdf

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.

Invoice Information | UHS Data Line | Payments | Voucher Attributes | Accounting Information | **Documents**

Style: Regular Entry Status: Posttable
 Unit: 00765 Voucher ID: 00036858 Group: Budget Status: Valid Post Status: Unposted

Copy from: Source Document
 PO Unit: Purchase Order: Copy PO Worksheet Copy Option: None

Vendor: Vendor: 0000035732 Name: COASTALOFF-001 Location: V Address: 1 COASTAL OFFICE PRODUCTS INC PO Box 396	Invoice: Invoice No: 12345 Invoice Date: 02/15/2006 Pay Terms: Net 30 Misc Amt: Frght Amt: Sales Tax: SUT Exempt Use Tax: VAT:	Calc Basis Date Acctg Date: 02/20/2006 Pay Schedule: Other Non Merchandise Summary VAT Summary
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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.

Invoice Information | UHS Data Line | Payments | Voucher Attributes | Accounting Information | Documents

Unit: 00765 Invoice: 12345 Vendor: COASTAL OFFICE PRODUCTS INC
 Voucher: 00036858 Date: 02/15/2006 ID: 0000035732
 Post Status: Unposted Posting Date:

Voucher Coversheet
[Print Voucher Coversheet](#)

Voucher Document Images

Display Active Documents Only Add New Document

Find | View All First | 1 of 1 | Last

Secured Document

Document Status: Active Document Seq Nbr: 1
 Created By: CAYLORKM
 Created Date/Time: 02/20/06 4:45:17PM
 Last Update User ID
 Last Update Date/Time

Image Type: application/pdf

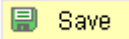
STEP 8: Always check your Image Type as should have a name of:

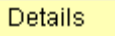
Application/ = (name of application)/
 or Image/ = (name of document)/

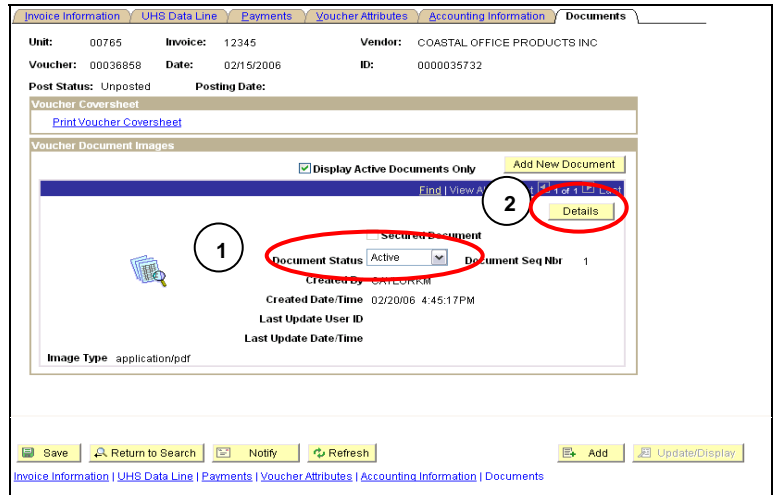
NOTE: If the image name is "oclet-stream", it will not open and you will need to inactive it and attach a new copy of the image again.

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*).

