

Attaching and Viewing Scanned Documents in Travel Manager

Last update: October 2008

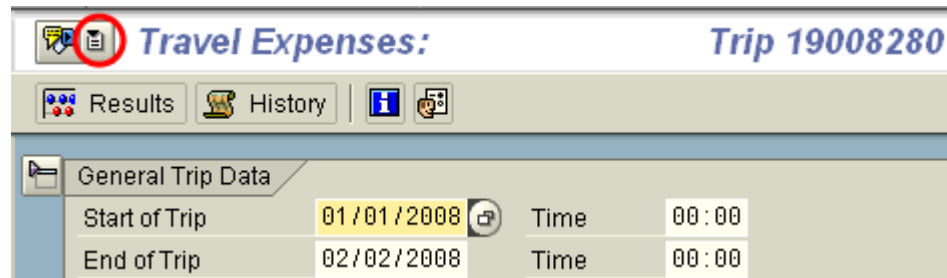
Attaching Documents in Travel Manager

Last update: October 23, 2008

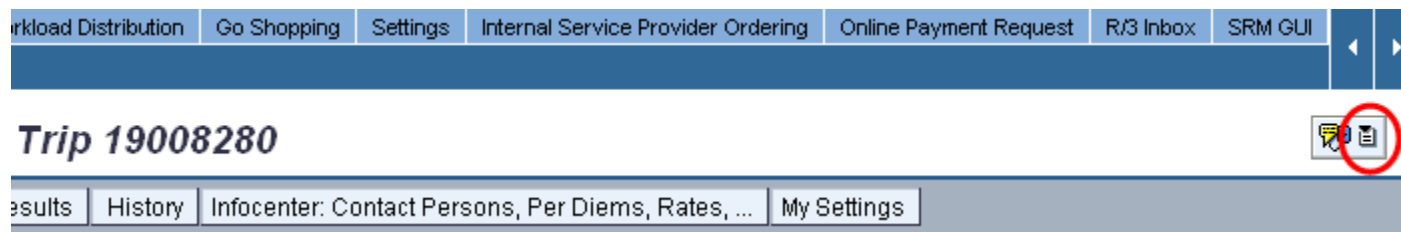
Attaching a Scanned Image to a Travel Document

Complete and save a Travel Request or Travel Expense Report. Record the Personnel Number (PERNR) and document number – displayed after the document has been saved one time. Open the document in Travel Manager (TRIP).

To attach a scanned receipt (an attachment), click the right side of the “Services for Object” icon.



WinGUI

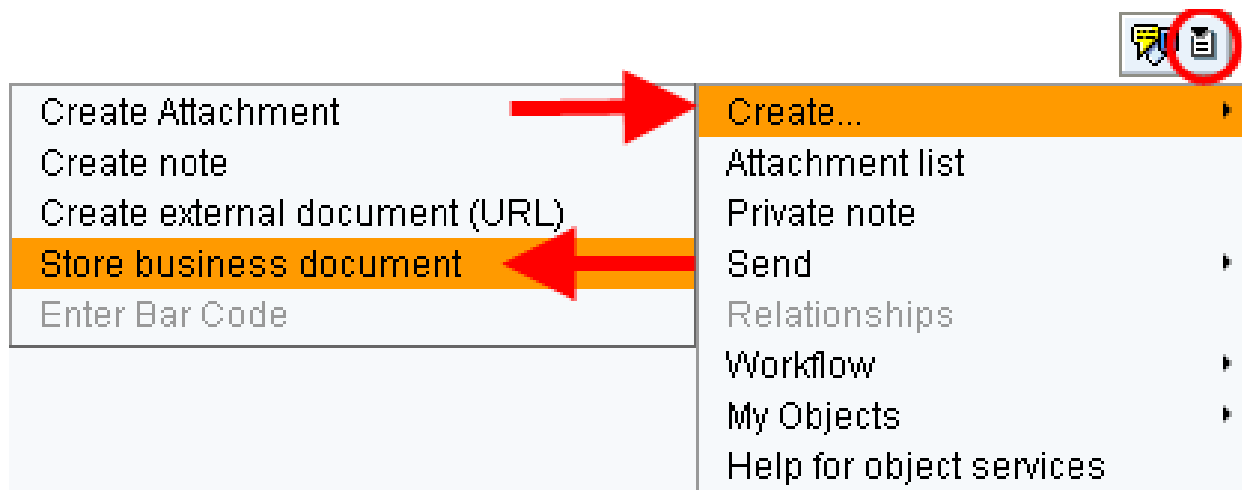


WebGUI

To add an attachment to a travel document:

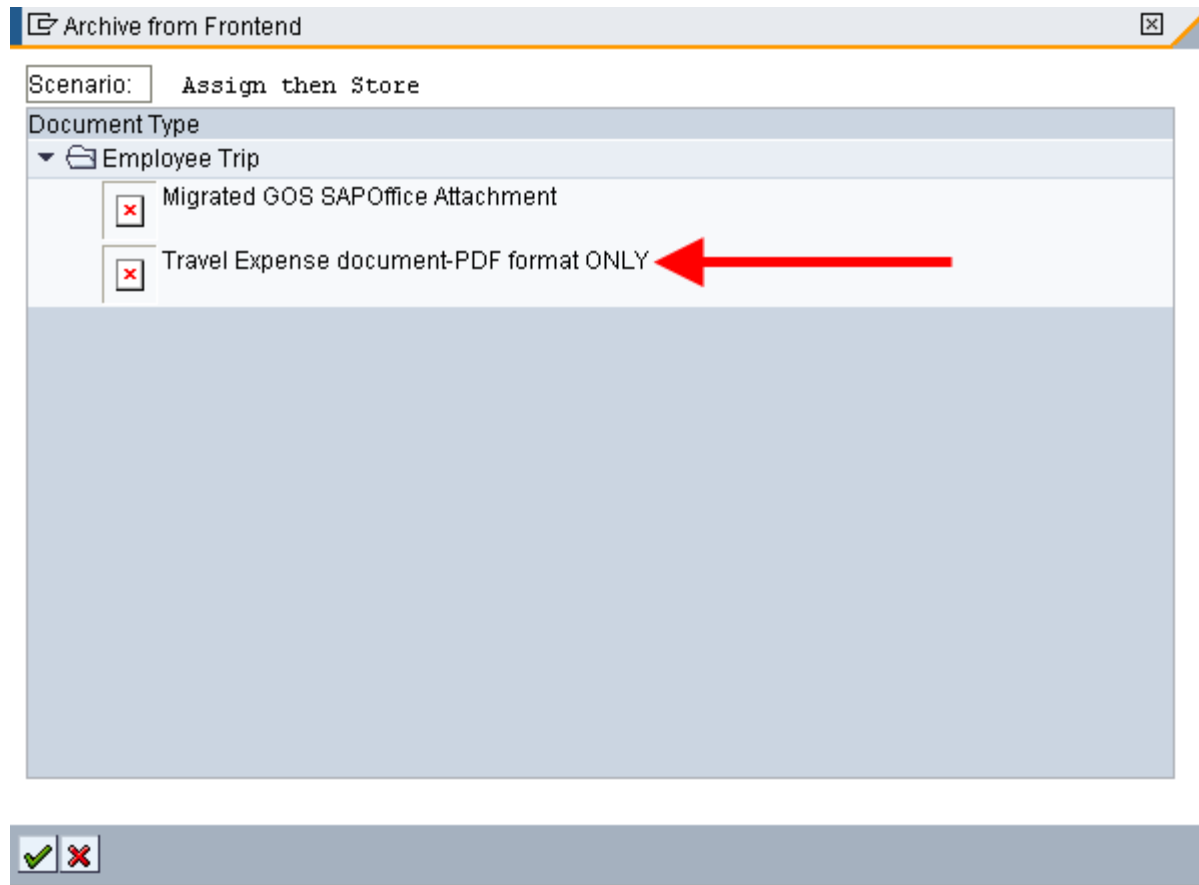
1. From the drop-down list derived from “Services for Object” icon, cursor over “Create,” a second window appears.
2. Click “Store Business Document.” Do NOT use “Create Attachment” (this option will be removed from future displays).

Approvers may use the “Create note” to provide information as to why they have returned or rejected a document.



Attaching a Scanned Image to a Travel Document

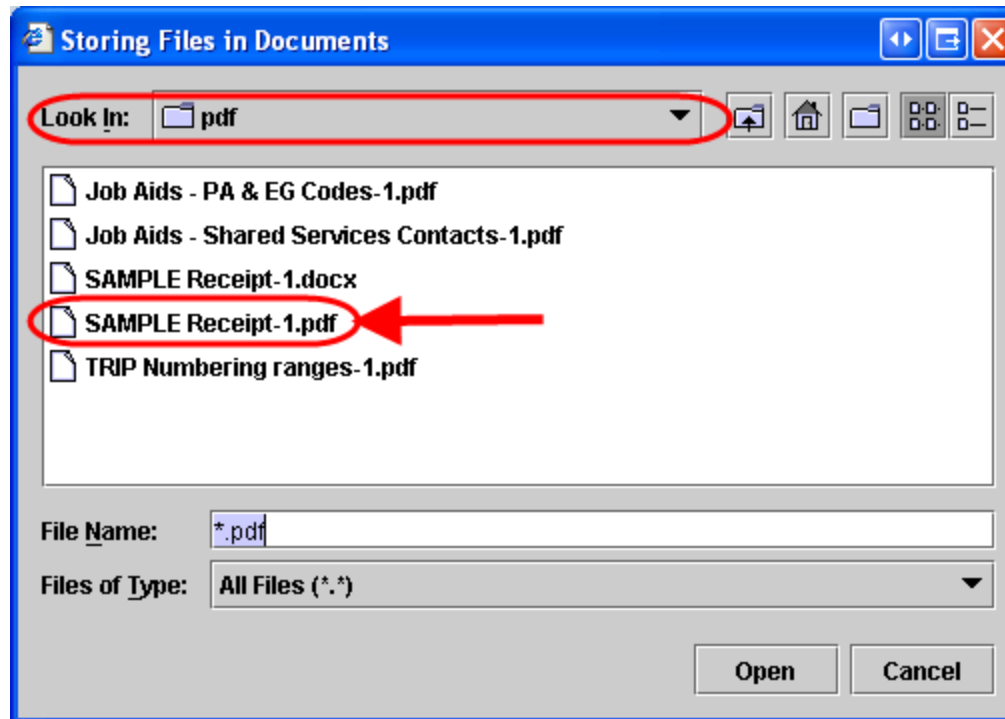
From the "Archive from Frontend" screen, double click "Travel Expense document-PDF format ONLY." This takes the user to folders accessible through the host computer.



Attaching a Scanned Image to a Travel Document

On the “Storing Files in Documents” screen, select the folder where the .pdf attachment is stored in “Look In:”

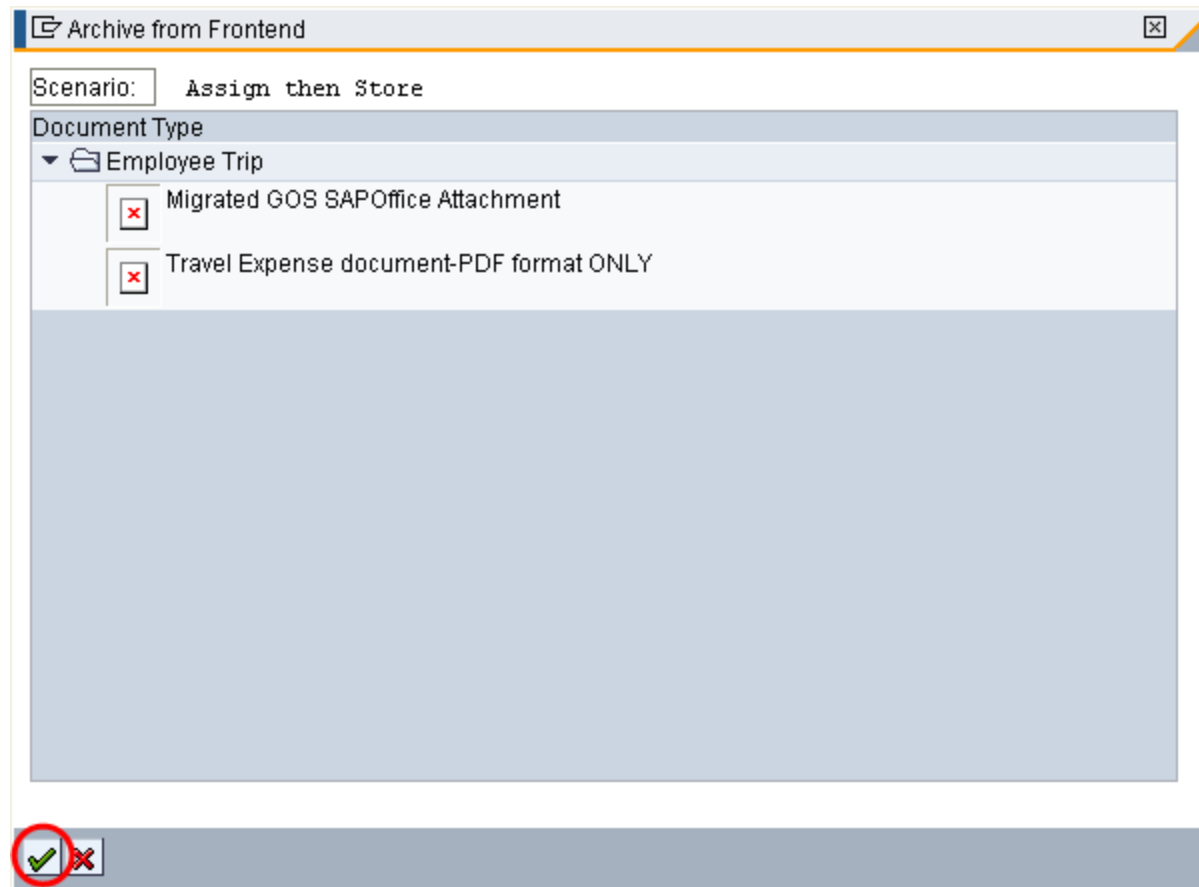
Double click the file or click “Open.” Wait for the hour-glass to stop turning – this may take some time.



Attaching a Scanned Image to a Travel Document

After the hour-glass stops turning the screen is returned to the "Archive from Frontend" window. There is no other apparent indication that transfer and saving of the attachment has occurred.

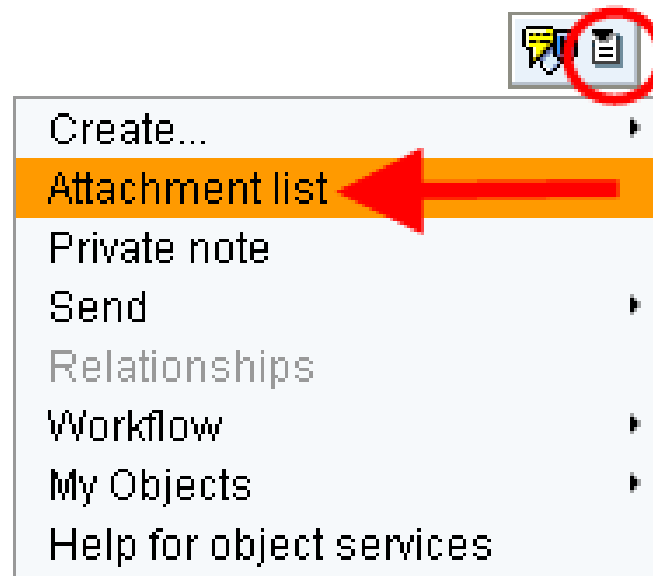
Click the green check to complete the attachment process.



Viewing an Attachment to a Travel Document

Viewing an Attachment to a Travel Document

To view an attachment that has been added to a travel document, open the document in Travel Manager (TRIP). Click the right side of the “Services for Objects” icon. In the drop-down window click “Attachment list.”




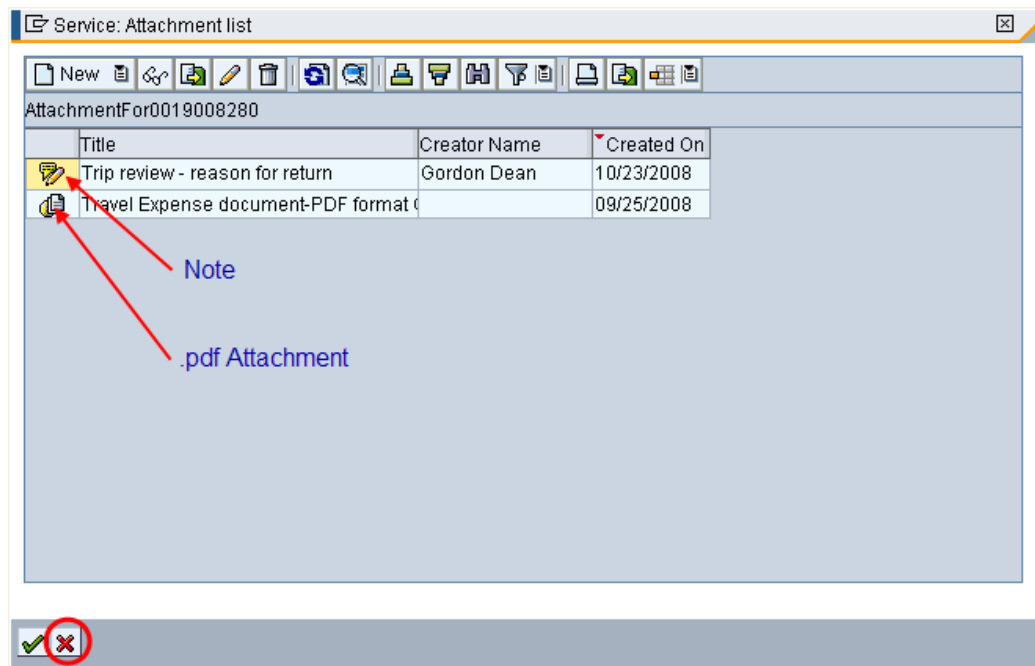
Viewing an Attachment to a Travel Document

The "Service: Attachment list" displays a list of all attachments made to a travel document with the date that they were added.

Notes are added by approvers to provide information on actions taken; including reasons for rejection or return of a travel document.

Travel Expense documents are the receipts or other documentation required to support a travel document for approval.

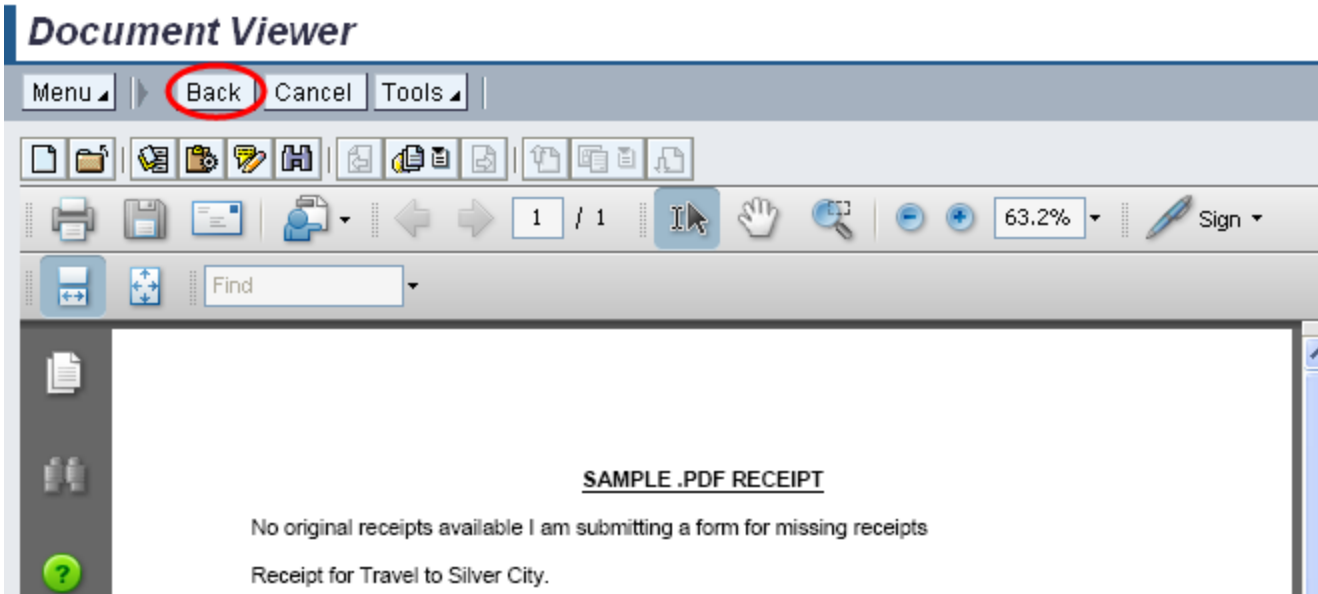
To view a note or .pdf attachment, either double click the icon (left side of row) or select the row and click the green check .



Viewing an Attachment to a Travel Document

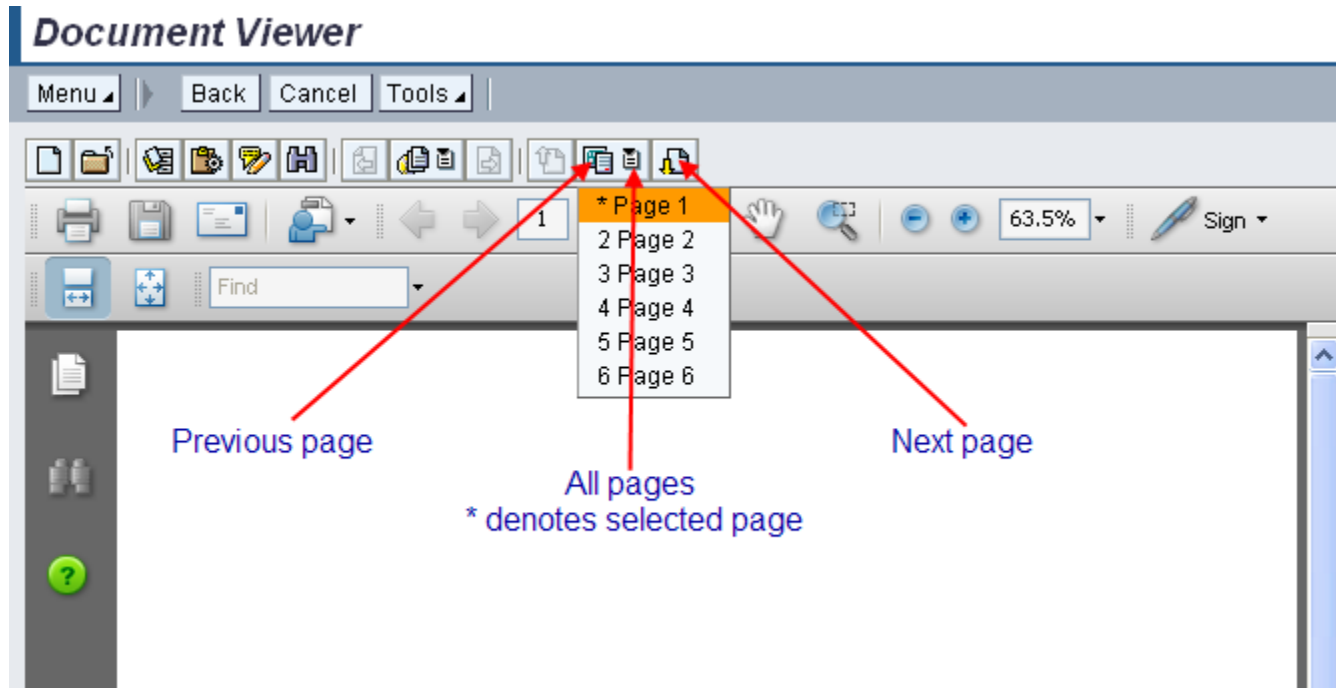
The contents of an attached document are displayed in the Document Viewer.

To exit the Document Viewer, click the “Back” button to return to “Service: Attachment list.”




Viewing Multiple Pages on an Attachment

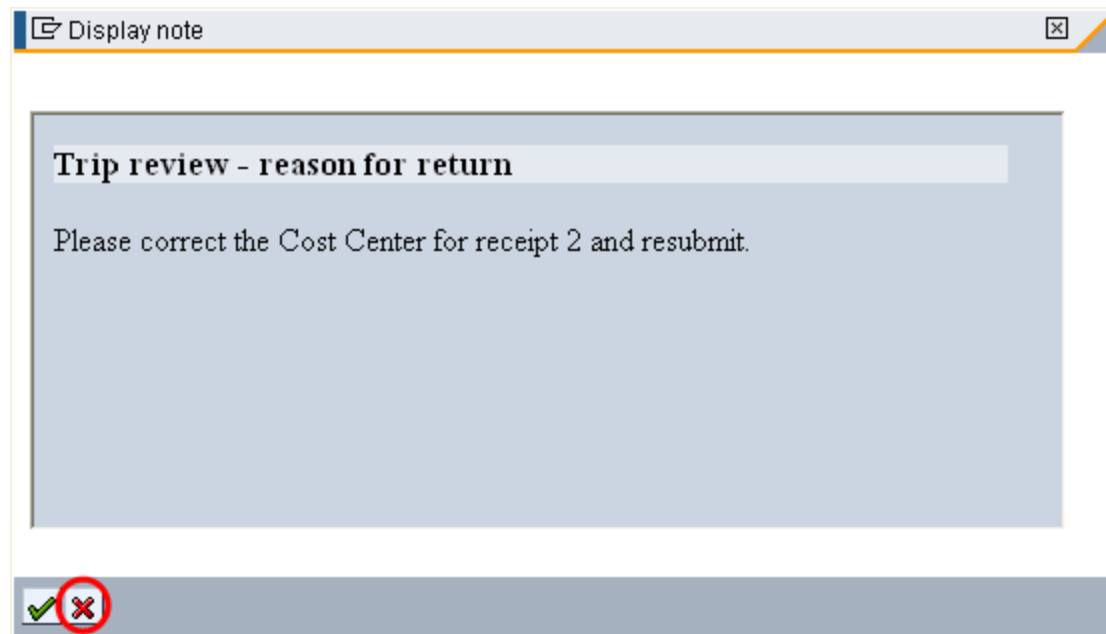
If a one-page attachment is selected in the Document viewer, that page will be displayed.
If a multi-page document is selected in the Document viewer, only the first page will be displayed and the menu line will display " 1 / 1 "
To view additional pages select the "Next page" or "All pages" icon to view subsequent pages.
It is only possible to print one page at a time.



Viewing an Attachment to a Travel Document

The contents of a note are displayed in the “Display note” window.

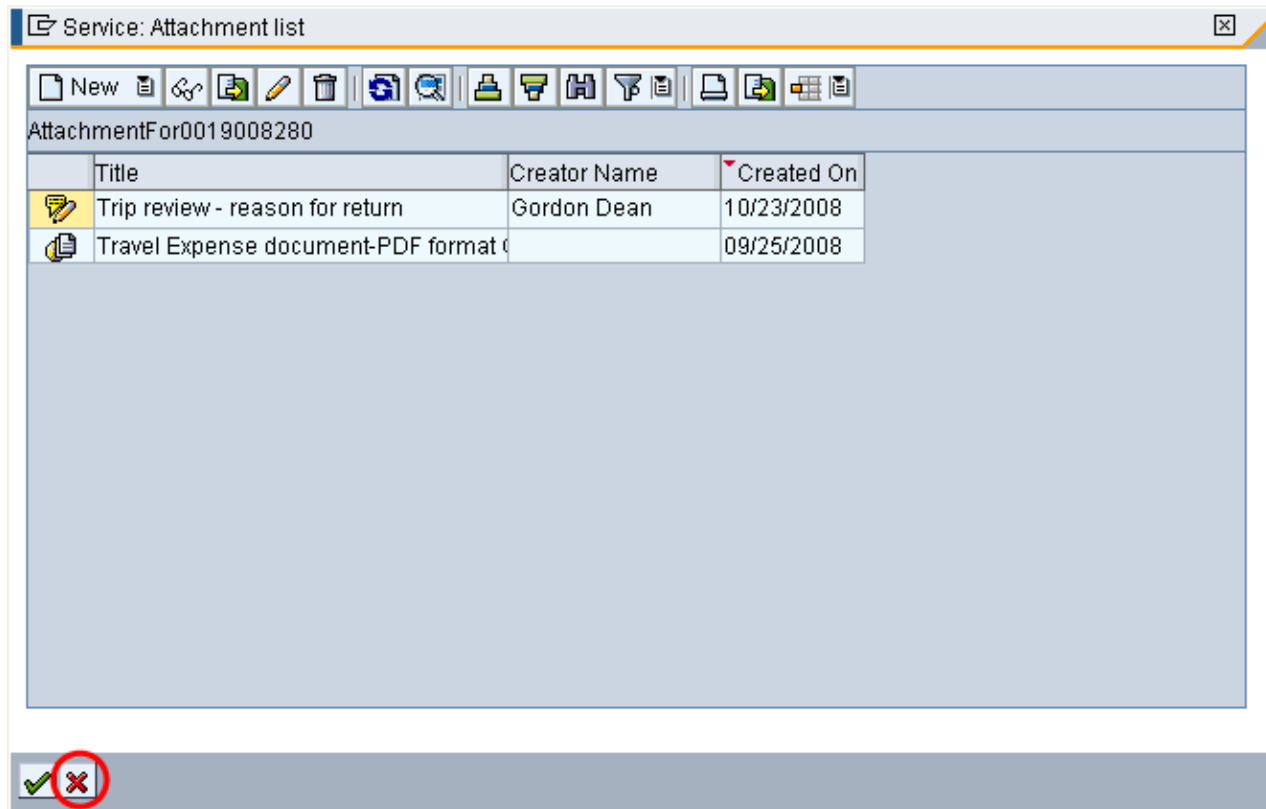
To exit the “Display note” window, click the “Cancel” button  to return directly to the travel document display.





Viewing an Attachment to a Travel Document

Closing the "Document viewer" window returns the display to the "Service: Attachment list." Close this window with the cancel button to return to the travel document.

If all information has been entered into the travel document ,save and submit the document (save two times) into workflow.



The screenshot shows a window titled "Service: Attachment list" with a toolbar and a table of attachments. The table has three columns: Title, Creator Name, and Created On. There are two rows of data.

	Title	Creator Name	Created On
	Trip review - reason for return	Gordon Dean	10/23/2008
	Travel Expense document-PDF format		09/25/2008

At the bottom left of the window, there are two buttons: a green checkmark and a red 'X' (cancel button), with the 'X' button circled in red.