

Attaching Images to PCard Vouchers

OVERVIEW

Effective immediately, PCard supporting documentation will be “attached” to vouchers in myUFL rather than faxed. This is the same method that is currently being used for journal entries. We hope that you will find this change in process to be more efficient and effective than fax imaging. You may now do this with the security role of UF_FI_UNIVERSAL_INQUIRY as well as the UF_AP_VOUCHER_PROCESSOR.

Benefits of using the attachment feature include:

- No more printing fax barcode sheets
- No more faxing
- No long distance fax calls
- Clearer, crisper images
- Easier identification of vouchers without required images attached

STEPS

1. Scan and save the document(s) to be attached.
2. In myUFL navigate to the voucher: Accounts Payable > Vouchers > Add/Update > Regular Entry
3. Click the **Find an Existing Value** tab and enter the voucher number.

The screenshot shows a search interface with two tabs: "Find an Existing Value" (highlighted with a red circle) and "Add a New Value". Below the tabs, there is a search criteria form. The "Maximum number of rows to return (up to 300):" is set to 300. The "Business Unit:" is set to "UFLOR". The "Voucher ID:" is set to "begins with" and "03546666" (both highlighted with a red circle). Other fields include "Invoice Number:", "Invoice Date:", "Short Vendor Name:", "Vendor ID:", "Name 1:", "Voucher Style:", "Related Voucher:", "Entry Status:", and "Voucher Source:". At the bottom, there are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

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- Click on the **Invoice Information** tab, then click the **Attachments** link.

The screenshot shows the 'Invoice Information' tab of a web application. The interface includes several sections:

- Business Unit:** UFLOR
- Voucher ID:** 03546666
- Voucher Style:** Regular Voucher
- Invoice No:** TX-FOS11-0475
- Invoice Date:** 01/06/2012
- Accounting Date:** 01/06/2012
- Vendor ID:** 0000133333
- ShortName:** THEAMRASCO-001
- Location:** 001
- *Address:** 1
- Vendor Name:** The Amras Corporation, 1926 Silver St, Garland, TX 75042
- *Pay Terms:** 10 Net 10
- Basis Date Type:** Inv Date
- Invoice Lines:** 25.00
- *Currency:** USD
- Miscellaneous:** (empty)
- Freight:** (empty)
- Total:** 25.00
- Difference:** 0.00
- Copy From Source Document:** PO Unit, PO Number, Copy From (set to None), Go

 The 'Attachments (0)' link is circled in red. Other visible links include 'Session Defaults', 'Comments(0)', 'Calc Basis Date', 'Withholding', 'Voucher Image', 'Fax Cover', 'Print Invoice', and 'Calculate'.

- At the Voucher Header Attachment page, click the **Add Attachment** button.

The screenshot shows the 'Voucher Header Attachment' page. It displays the following information:

- Business Unit:** UFLOR
- Voucher ID:** 03546666

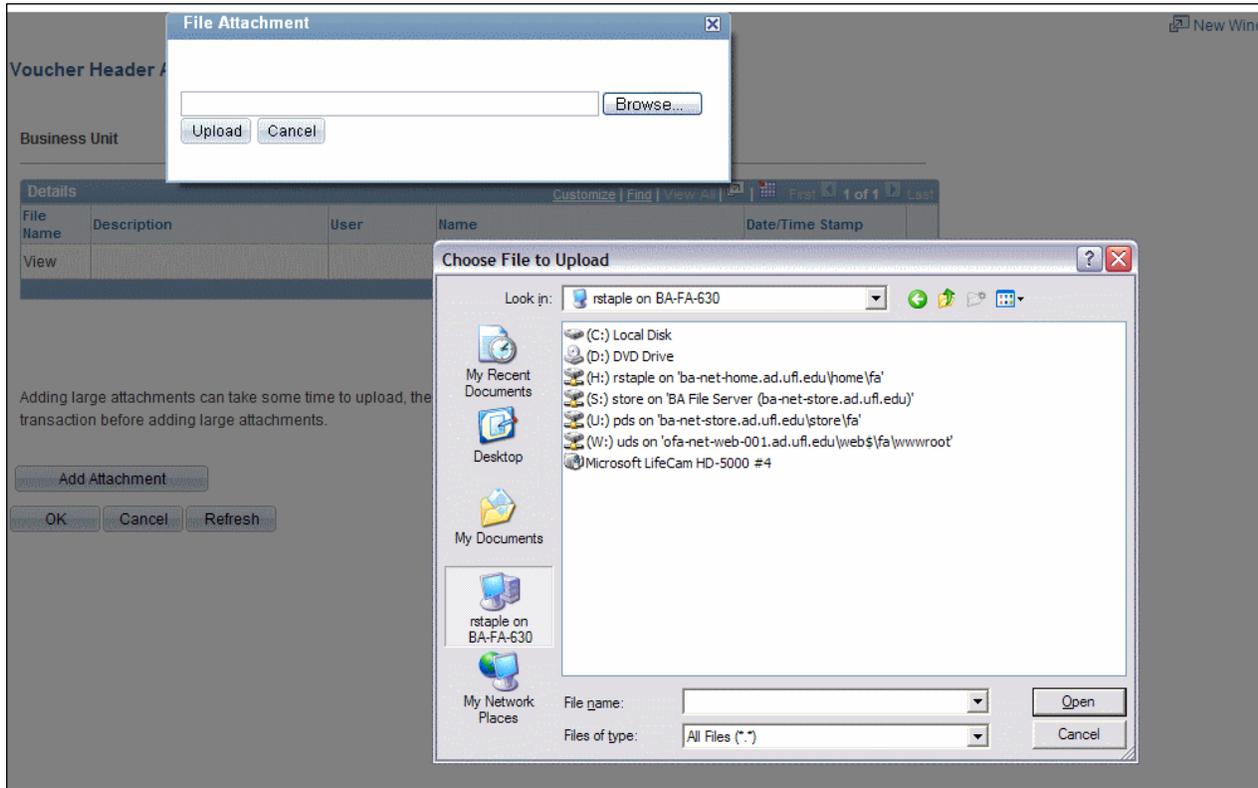
 Below this is a table with the following columns: File Name, Description, User, Name, Date/Time Stamp. The table is currently empty.

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

The 'Add Attachment' button is circled in red. Other buttons visible are 'OK', 'Cancel', and 'Refresh'.

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6. Click the **Browse** button and find the invoice image to upload. Click the **Open** button to select, then click the **Upload** button.



Once back on the **Voucher Header Attachment** page, you may delete the attachment by clicking the minus (-) button on the right end of the row

7. Click the **OK** button when finished adding attachments. The **Attachment** link will display the number of attachments for this voucher, such as Attachments(1).

For further assistance, please contact the Imaging Team in Disbursements with any questions regarding this new process at 392-1241, or e-mail fapfimaging@admin.ufl.edu.