Travel v1.6.0 Release Notes

Changes

Attachments
The travel system will now allow backup documentation to be attached to a travel request. The system will accept pdf files and images of several types including jpeg, png, and tiff. The preparer creates and annotates the attachments and then they will be available for authorizers and approvers to view while reviewing the request. The attachment screen is accessed by clicking on the “View” menu and selecting “Attachments”.

Creating Attachments
There are several ways that these files can be scanned and uploaded into the travel system so preparers can use the methods that best fit their needs. The most common options will be to either scan the documents with the provided ECU copier/scanners or with a desktop scanner if you have one available to you. If you use an ECU copier/scanner the files will be sent to you via email and if you use a desktop scanner the files will be saved directly to your computer.

Once scanned, the files can be edited before they are uploaded to the system. Adobe Acrobat can be used to extract or rotate pdf pages and merge multiple pdf documents. Desktop image editors can be used to crop and rotate images. Files can be named whatever the preparer prefers; the original file name is stored and available in the system for reference.

The system will verify that the uploaded file of an acceptable type and that the file itself is valid. It will also reject files that are too large. Initially the file size limit is 8MB, however this subject to change at any time depending on the needs of the system. It will be beneficial to upload the smallest possible file necessary; using files that are larger will increase the time it takes to upload them and the time it takes for the reviewers to view them. Because of this, the following guidelines are recommended. These settings will be common to most scanners. All questions regarding hardware should be directed to the helpdesk.

- Use black and white where possible, only use color scans if absolutely necessary. Color scans can be much larger than black and white.
- Use 200dpi. Dpi stands for “dots per inch” which is related to how large the image will be. Higher dpi values create larger images.

There are a couple of other settings that have a significant impact on how the system handles the files created.

**Pdf/Tiff:** When a pdf is uploaded to the travel system is uses a viewer that allows you to move page to page, zoom, and move the document around. A tiff (or any other image format) uses a viewer for images that will allow you to zoom and move the image around. The format you choose will determine the viewer that is used to display the attachment. Also, pdf is the ONLY format that will allow multiple pages to be scanned together into one file.

**Single/Multi:** this determines if the stack of pages loaded into the scanner will all be added to the same file (Multi) or if they will each be scanned to their own file (Single).

If you need to keep a group of pages together (like an agenda) you will have to make sure that Pdf/Multi is selected. These settings are also shown in the scanner instructions below.

Pdf/Multi will work in all cases, and is probably the best choice if you aren’t sure what to pick.

*Uploading Attachments*

Attachments are uploaded to one request at a time. There are two ways to upload to a request.

**Attach via File Upload**

While viewing the attachments screen (View → Attachments once in a request) clicking the “Upload” button in the top left of the screen will display the “File Upload” box.

The blue arrow next to the upload button is an attachment refresh button. Use it if you don’t think you are looking at the most recent version of the attachment.

The “Browse” button will display a window that you can use to select multiple files to upload.
Clicking “Open” will load the files into the upload box.

Clicking “Upload” will start the upload process.

The files will upload, then they are “Processed”.

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Multiple files will upload at once, up to a maximum of 5, but that number can change at any time depending on the needs of the system. When one is complete the next one will start. The progress bar will turn green if the operation completes successfully, otherwise it will turn red if there is a problem.

Holding the mouse over a progress bar will display a yellow box which will provide more information. When all uploads are complete, the screen will refresh and update the items in the attachment list on the left.
Attach via Email
Because many preparers will be using the copier/scanners the system allows files to be uploaded and attached to a request via email. The process works as follows:

1. Documents are scanned to either tif or pdf.
2. The scanner will email the files to the preparer’s address.
3. The preparer receives the email and forwards it to travelUploads@ecu.edu with ONLY the following text in the subject line “Travel Upload: x” where x is the travel request number.
   i. Example Subject Line: Travel Upload: 12345
   ii. Note there is a space between the word “Travel” and the word “Upload” then there is a colon, another space, and then the request number.
   iii. There should be nothing else on the subject line.
4. The travelUploads@ecu.edu email address is checked every 5 minutes. When it finds messages it will read the subject line and the “from” email address. If the request is unlocked, and the person sending the email has access, then the attached files will be uploaded, processed, and attached to the request.
5. The outcome of this process will then be mailed back to the preparer. If you receive the email and do not see the attachments in the list click the blue refresh arrow.

The travelUploads@ecu.edu account only accepts email from ECU email addresses.
Viewing Attachments
Attachments for a request are listed on the left side of the screen in the attachment list. Attachments in this list are sorted by label in the same order as expenses are sorted on the main form.

In the top left corner is the active indicator, a green check shows for active attachments, a red "X" for inactive attachments.

In the top right corner is the locked indicator, the open lock is shown for unlocked attachments, the closed lock for locked attachments.

A thumbnail of the attachment is shown for reference, and below that the label that is assigned to the attachments.

![Image of attachment list]

Viewing Images
The image viewer has a zoom slider that will change the size of the image. The scroll wheel will also zoom the image if the mouse of over the image. Clicking and holding the mouse over the image will allow the image to be moved around.
Viewing Pdfs

The pdf viewer has many of the same controls as other pdf viewers; the magnifying glass icons zoom in and out, also Ctrl + Scroll Wheel will change the zoom as well. The fit height, fit width, and fit page buttons automatically adjust the zoom as well. For multipage documents, the first, previous, next, and last buttons will move through the pages. You can also jump to a page by typing it in the "pg#" box and pressing enter.

You can also use the scroll wheel on the mouse for different things. What the scroll wheel does depends on if there are scroll bars or not. If there is a scroll bar then the scroll wheel will move the document up and down. If there are no scroll bars then the scroll wheel will scroll through the pages. Also, if there are scroll bars, then you can click on the page and drag it to view different parts of the page.
**Editing Attachments**

Once the files are attached to the request, there are a few options for managing and adding additional information to them. Editing is only allowed if the request is unlocked, the attachment is unlocked, and you have rights to edit attachments for that request (Preparer, or Travel Office).

**Labels**

A label is the most important piece of information about an attachment. Labels organize and identify the contents of attachments, and are required on each attachment. Attachments are labeled by selecting the appropriate item from the drop-down list on the attachment edit screen.

![Image of label selection in attachment editor](attachment_label_selection.png)

The label options are derived from the expenses that have been previously added to the request.

There are a few labels that are always available and more can be created by the travel office. Initially those labels are:

- Memo: used when attaching late memos, acceptance letters, etc.
- Multiple: used when several small receipts are attached to a single page.
- Other: used for items that don't fit under any other label.

In order to be able to label the attachments correctly, the backup will need to be organized into packets by expense type and scanned together into one PDF file. Based on the label, the attachments will sort themselves on the screen so they are always in the same order just like the expenses sort in the expense grid. The sort order is as follows:
Registration: agenda, proof of payment, registration form
Meals (Breakfast/Lunch/Dinner): If paying above per diem
Hotel: hotel bill with zero balance, online reservation forms

Transportation:
  - Airline: itinerary, proof of payment
  - Mileage: Mapquest, mileage log
  - Rental Car: contract and proof of payment
  - Taxi/Shuttle: proof of payment
  - Train/Amtrack: proof of payment

Standard Fees:
  - Airline Bags: proof of payment
  - Bags/Tips: proof of payment
  - Gas/Tolls: proof of payment
  - Internet: if separate from hotel bill
  - Parking: Proof of payment
  - Phone: proof of payment

Another note on sorting:
In addition to the label, the attachments will sort the active ones at the top and the inactive ones at the bottom. If all of the labels are the same (Blanket Travel: Mileage) then the labels will sort by the day they were uploaded with the newest attachment on top.

Comments
Comments are used to explain something not obvious about the attachment or to clarify illegible portions of the attachment. The comments are visible to all users.

Active
The active checkbox controls if the attachment is visible to all users or not. When checked a green check is displayed in the attachment list, when unchecked the attachment is flagged with a red “x” and is sorted to the bottom of the attachment list. Attachments are not deleted; they are hidden from the authorizers and approvers, but are always visible to the preparers and the travel office.

Locking
The travel office has the ability to lock an attachment so no further changes can occur to that attachment. If they review an attachment and want to prevent further changes then they can uncheck this checkbox and it will appear in “View” mode to all other users.

Save
The save button will activate once you have changed something on the attachment. If you forget to click “Save” and click on another attachment, the system will prompt you to save the attachment before leaving the current attachment.
Copier/Scanner Instructions

The campus copier/scanners vary slightly between models, however most models are very similar in how they look and the labels on the buttons. There may be differences in the location of the buttons or the order that the screens appear, but these instructions should serve as a reference for scanning with these machines.

Suggestion: Use this scan button NOT the start button.

The reason is that pressing the “START” button will work, but you might not get to see all of the setting screens to see how your scan is set up. Sometimes the digital “SCAN” button is covered by multiple settings screens. Click “OK” through those screens to start the scan.

Most copy/scanners will be set to “Copy” by default. To get ready to scan press the “Scan” button.

The scans will be emailed to the user so select “E-mail”.
This screen allows the recipient of the email to be selected. Many copiers already have names and email addresses saved, so select your name from the list. Use the Up/Down buttons on the right side to move through the list and press the envelope and @ symbol next to your name to select it.

If your name is not in the list then you can type in your email address by pressing the "INPUT @" button and typing it in.

To save your email address follow these steps:

1) Press "User Function"
2) Choose "Address"
3) The saved names will appear
4) Scroll down until you find an empty space
5) Click on the empty space
6) Press "Entry"
7) Type your first name, last name, and email
8) Press Ok

Once the email has been selected (0001 next to the address means there is only one recipient) select "OK" to continue.
Depending on the model of your copier/scanner this screen may appear first or second.

The important options here are the file format, use only "PDF" or "TIFF". Tiff will result in an image scan and pdf will be a document scan. Only "PDF" allows multiple pages to be scanned together.

Selecting “MULTI” or “SINGLE” will determine if each page you scan is grouped together into one document (MULTI, for PDF only) or each page is separated into a different file (SINGLE, PDF or TIFF). You can use whatever combination of settings is necessary for what you are scanning, however most of the time “PDF/MULTI” will be the recommended settings.

Click “OK” to continue.
Click the blue "SCAN" button on the screen.

You may need to check the settings on the scanner. There is usually a "Settings" button on the right side of one of the screens.

Clicking it will show additional settings. The most important one is that the 200dpi option is selected.