



Instructions for Imaging Travel Reports / Expense Statements

Version 9/13/2010

Method 1: Scanning Directly Into OnBase

See Page 2

Method 1 is used for imaging Travel Reports and Expense Statements into SCEIS using a scanner that scans directly into OnBase.

When you have completed Method 1 your travel images will be attached to your trip document in SAP and will be visible to the people that approve your expenses for payment.

Method 2: Sweeping Images Into OnBase

See Page 5

Method 2 is used for imaging Travel Reports and Expense Statements into SCEIS using a network copier/scanner or a small desktop scanner that does not scan directly into SCEIS.

Image files are saved in a directory on your workstation and loaded into SCEIS using the “sweep” function in OnBase instead of the scan function.

When you have completed Method 2 your travel images will be attached to your trip document in SAP and will be visible to the people that approve your expenses for payment.

Appendix 1: Reference Slides from Travel Management Training Course TV120

See Page 10

These slides are provided for reference about how to print your Travel Report / Expense Statement in MySCEmployee and how to send your expense report for approval after imaging is completed.

If you send your trip for approval before imaging is complete the images will not be available for the people that approve your trip. Images will attach to your trip when imaging is performed regardless of where the trip is in the workflow approval process.

Viewing of Travel Images

Images attached to Trips will not be available in the Trip attachment list for the traveler or the travel assistant to see. Images will be available to everyone that has approval responsibility.

Travelers and travel assistants will know that images are successfully attached to a Trip when they receive an email confirmation that scanning is complete. See instructions for Method 1 and Method 2 for more details.



Instructions for Imaging Travel Reports / Expense Statements

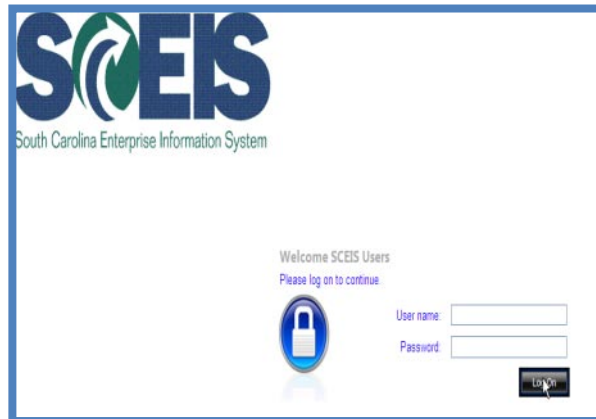
Method 1: Scanning Directly into OnBase

PRINT AND SIGN YOUR EXPENSE REPORT / TRAVEL EXPENSE STATEMENT

Print your Travel Report / Expense Statement from MySCEmployee and sign the certification on the last page. Collect your travel receipts and supporting documentation. (Refer to Appendix 1)

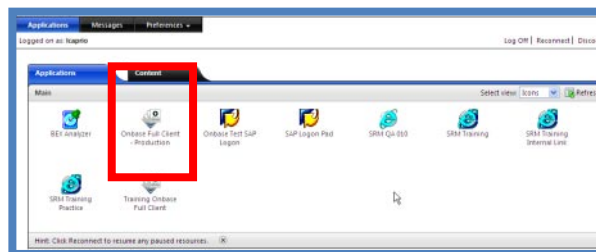
LOGIN TO THE SCEIS ONBASE CLIENT

Go to the Citrix web interface at <https://sceisgateway.sc.gov/vpn/index.html>
Enter your username & password. Click the Log On button.

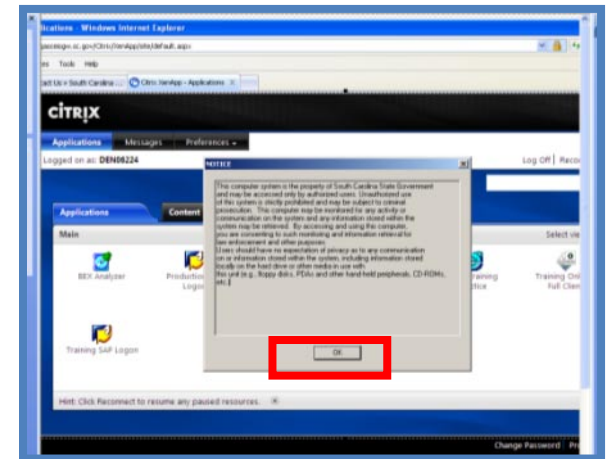


You may be required to change your password when you log in for the first time.

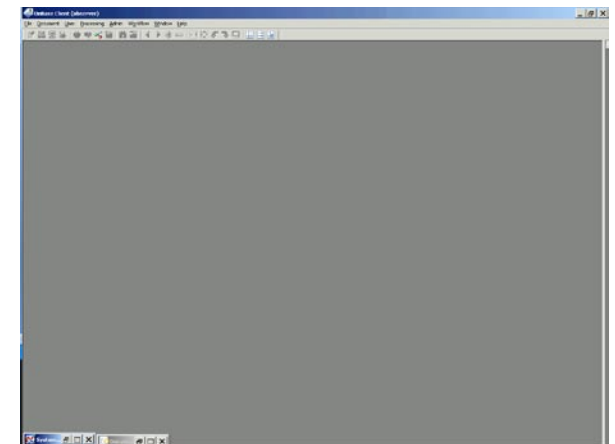
Click on the icon called "Onbase Full Client – Production" to access document imaging.



Click the OK button.



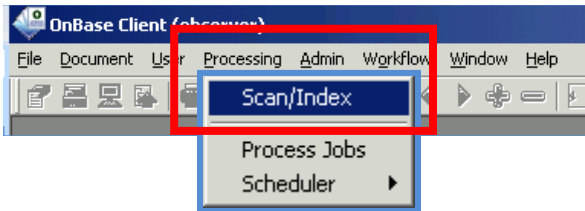
You are now logged into Onbase.



Method 1: Scanning Directly into OnBase

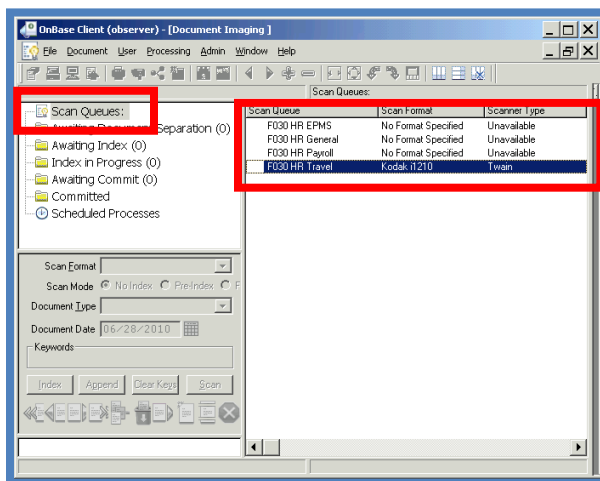
SCAN TRAVEL DOCUMENTATION

Click Processing...Scan/Index



Click Scan Queues.

Double-click on the Scan Queue called 'XXXX HR Travel', where XXXX is your agency number.

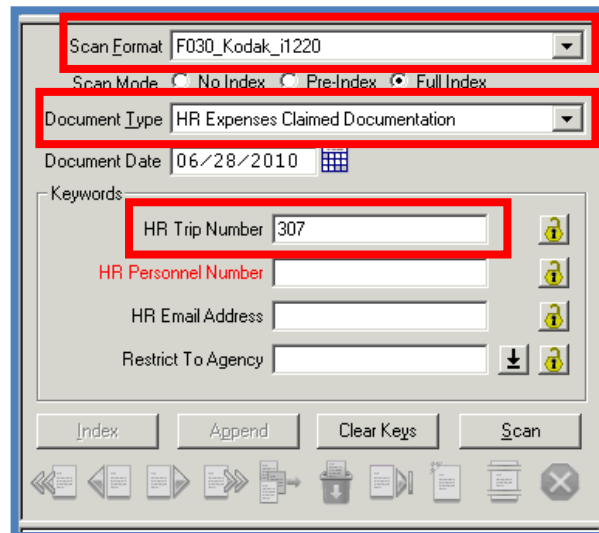


From the Scan Format drop-down list pick your agency and scanner model.

From the Document Type drop-down list pick the appropriate document type.

Keyboard Entry of Trip Number: Enter the HR Trip Number as described below only if you are not using a Kodak or Fujitsu scanner. If you are using a Kodak or Fujitsu scanner then skip to the paragraph labeled 'SCAN' because the scanner will read the trip number from the bar code.

In the HR Trip Number field type the trip number shown under the bar code on your Expense Report / Travel Expense Statement. You do not need to type the leading zeros.



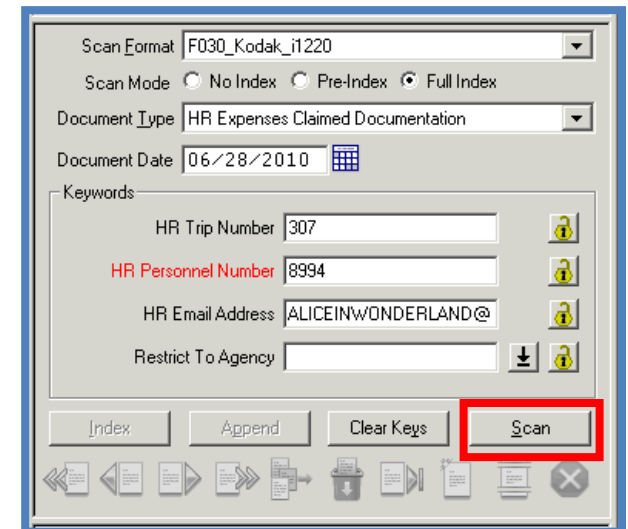
Press the Tab key after typing the HR Trip Number.

The system will fill in the HR Personnel Number.

If your agency maintains email addresses in SAP the email address will also be filled in.

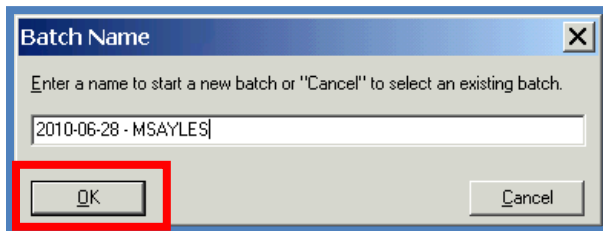
SCAN: Place the Expense Report / Travel Expense Statement and receipts into the scanner. They should be oriented top-down, print-side down, "Diving in Backwards", like a fax machine.

Click the Scan button.



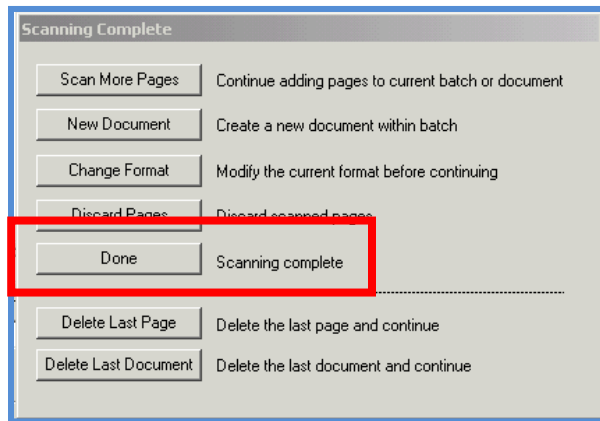
Method 1: Scanning Directly into OnBase

Click OK on the Batch Name screen



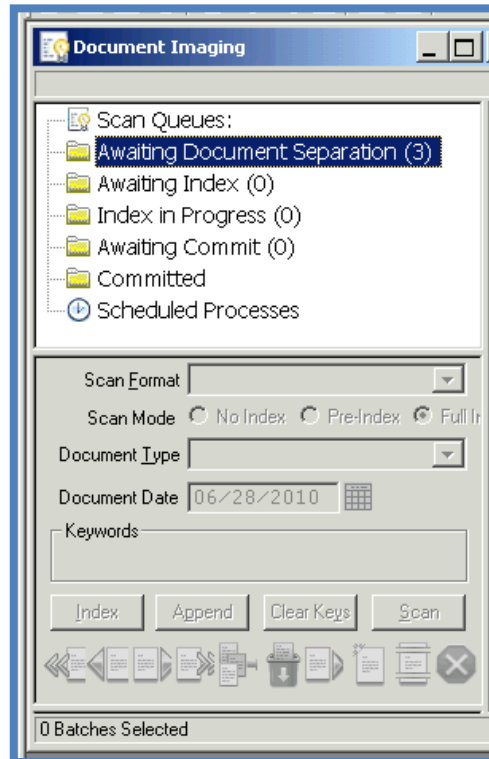
The paper will feed through the scanner and the last page will appear on the screen with the Scanning Complete screen.

Click the Done button.



The scanned batch is now in the Document Separation queue.

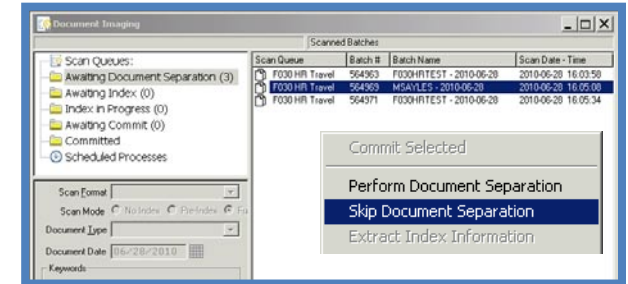
Click 'Awaiting Document Separation'.



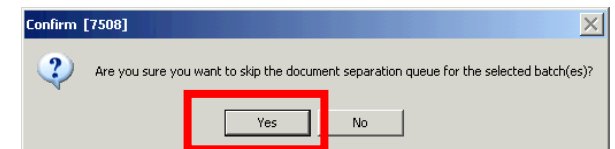
Put the pointer over your scanned batch. Your batch will be labeled with your userid.

Left-Click to highlight the batch...Right-Click to show the menu... Left-Click 'Skip Document Separation'.

Note: Select 'Skip' because these instructions are for scanning one trip at a time.



Click Yes



Scanning is complete.

The images are attached to your trip in SAP.

You will receive a mail item confirming that scanning is complete. The mail will arrive in your external email if your agency maintains email addresses in SAP. Otherwise the mail will arrive in your MySCEmployee Universal Work List (UWL).

You should now open the trip in MySCEmployee to "SAVE AND SEND FOR APPROVAL".

Instructions for Imaging Travel Reports / Expense Statements

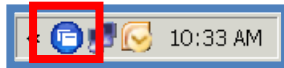
Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

ONE-TIME SETUP

Create a folder directly under your C: drive called '1 SCEIS Sweep'.

Log in to Citrix (sceisgateway.sc.gov) and log in to either SAP or OnBase, it does not matter which one. (See page 6 for logon instructions.)

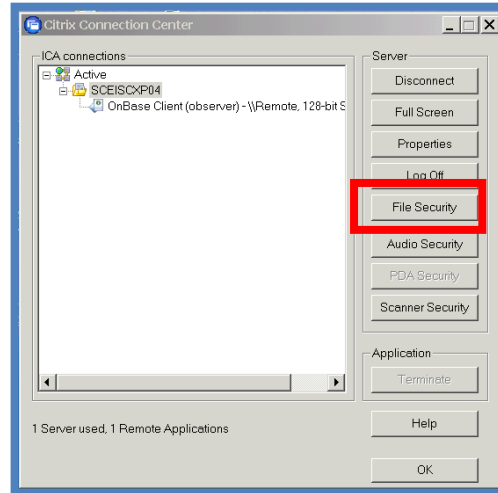
Right-click on the Citrix Connection Center icon in the system tray located in the lower right corner of the screen. (Your icon might have a red dot in the middle depending on your Citrix version.)



Left-click on 'Open Connection Center'



Click 'File Security'



Click 'Full Access' and 'Never Ask Me Again' then 'OK'



Click 'OK' to close the Citrix Connection Center



Instructions for Imaging Travel Reports / Expense Statements

Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

PRINT AND SIGN YOUR EXPENSE REPORT / TRAVEL EXPENSE STATEMENT

Print your Travel Report / Expense Statement from MySCEmployee and sign the certification on the last page. Collect your travel receipts and supporting documentation. (Refer to Appendix 1)

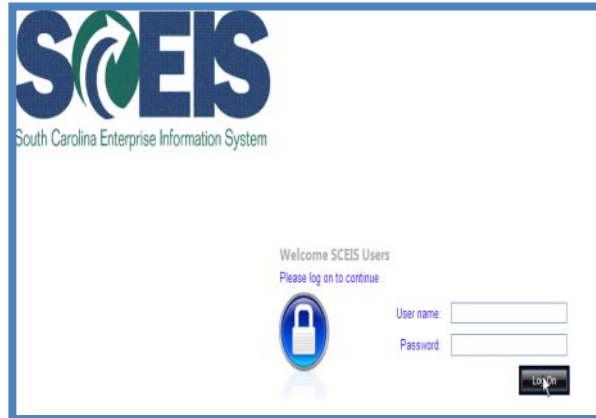
SCAN AND SAVE IMAGES

Scan your travel documentation on your network/copier scanner or desktop device (not connected to SCEIS) and save the file to the 'C:\1 SCEIS Sweep' folder that you created in the One-Time Setup above.

You may name the image file anything that you want to. It must be a file type of .pdf or .tif. Use .tif if your device can do either .pdf or .tif.

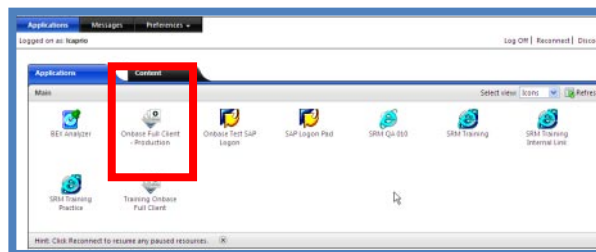
LOGIN TO THE SCEIS ONBASE CLIENT

Go to the Citrix web interface at <https://sceisgateway.sc.gov/vpn/index.html>
Enter your username & password. Click the Log On button.

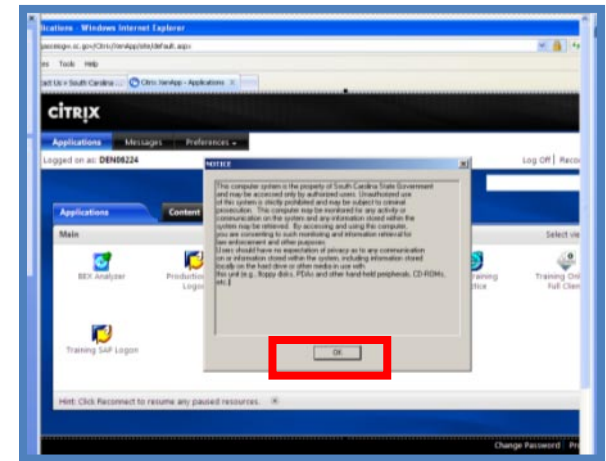


You may be required to change your password when you log in for the first time.

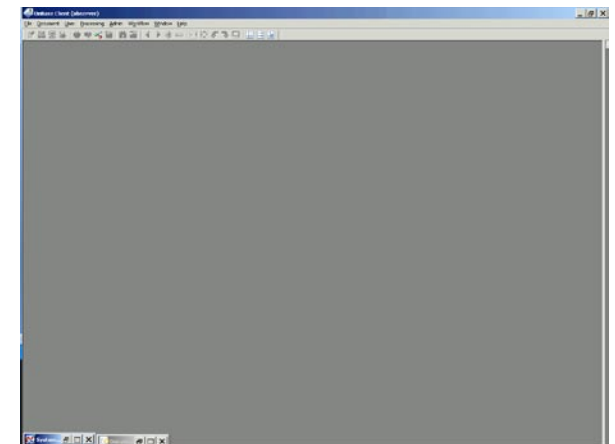
Click on the icon called "Onbase Full Client – Production" to access document imaging



Click the OK button.



You are now logged into Onbase.



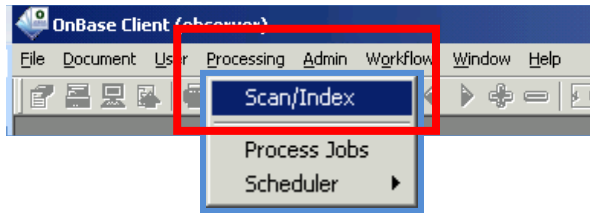


Instructions for Imaging Travel Reports / Expense Statements

Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

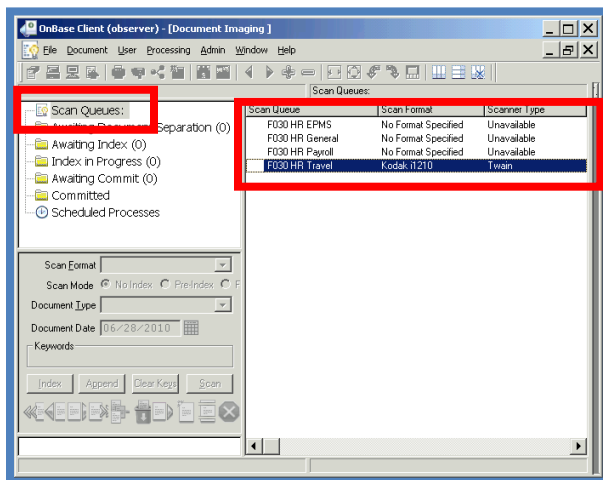
SWEEP TRAVEL DOCUMENTATION

Click Processing...Scan/Index

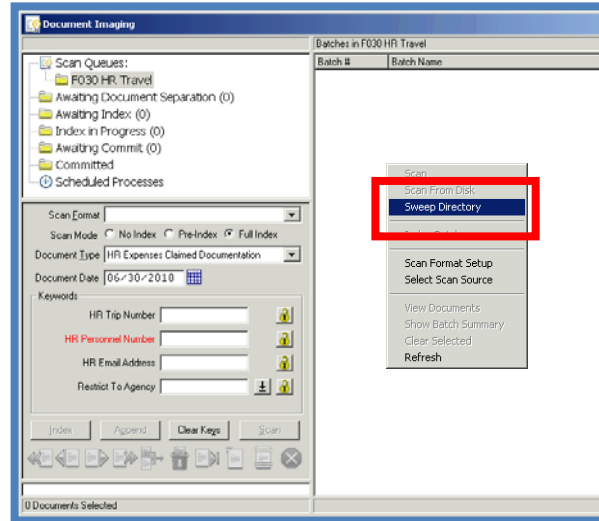


Click Scan Queues.

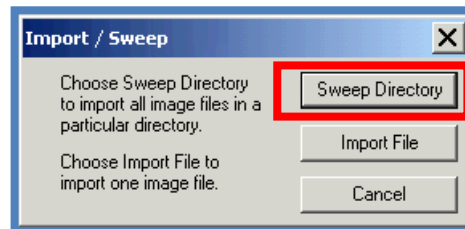
Double-click on the Scan Queue called 'XXXX HR Travel', where XXXX is your agency number.



Move the mouse to the white space... Right-click to show the menu... Click 'Sweep Directory'

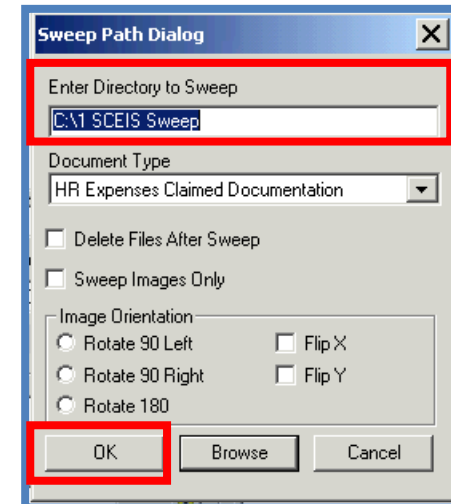


In the Import/Sweep screen Click 'Sweep Directory'

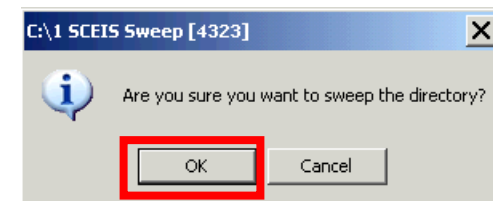


Type in C:\1 SCEIS Sweep or use the browse button to select the directory from your C: drive

Click OK



Click OK

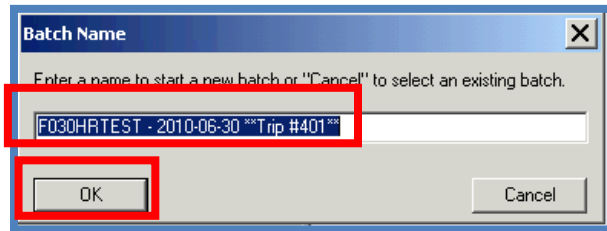


Instructions for Imaging Travel Reports / Expense Statements

Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

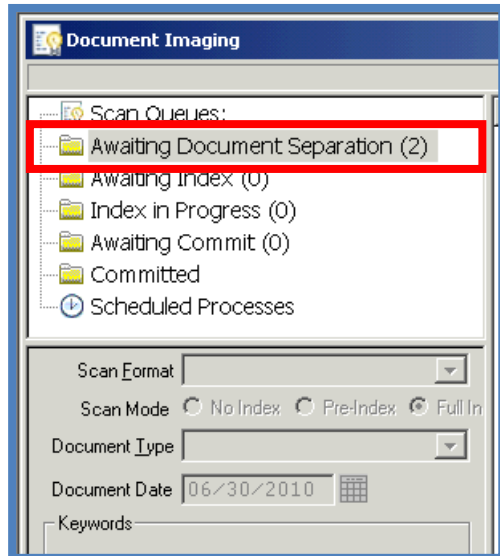
It is optional to type the trip number at the end of the Batch Name. If you enter the trip number do not remove your userid and date.

Click OK



The scanned batch is now in the Awaiting Document Separation queue.

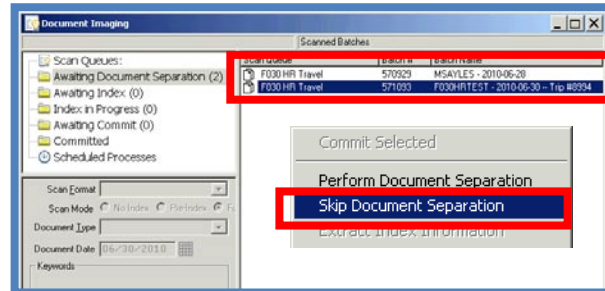
Click 'Awaiting Document Separation'.



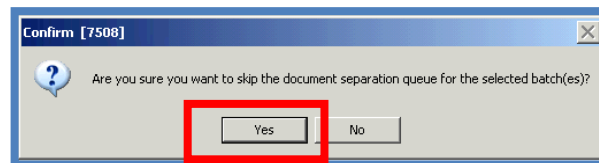
Put the pointer over your scanned batch. Your batch will be labeled with your userid.

Left-Click to highlight the batch...Right-Click to show the menu... Left-Click 'Skip Document Separation'.

Note: Select 'Skip' because these instructions are for scanning one trip at a time.

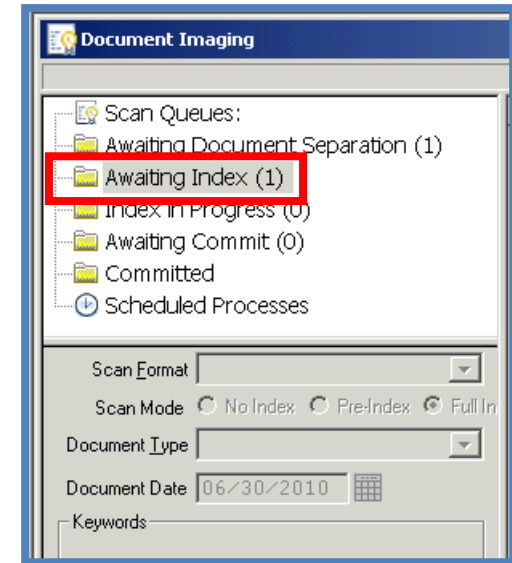


Click Yes



The batch is now in the Awaiting Indexing queue.

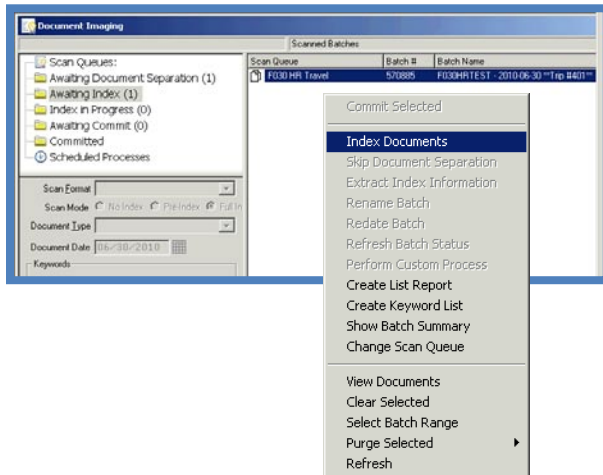
Click 'Awaiting Indexing'



Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

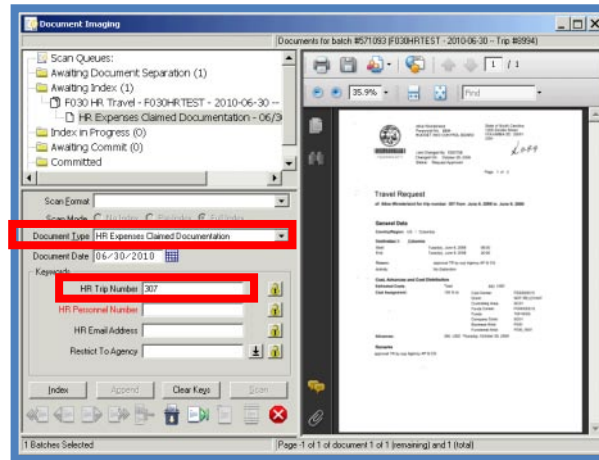
Put the pointer over your scanned batch.
Your batch will be labeled with your userid.

Left-Click to highlight the batch...Right-Click to show the menu... Left-Click 'Index Documents'



From the Document Type drop-down list pick the appropriate document type.

In the HR Trip Number field type the trip number shown under the bar code on your Expense Report / Travel Expense Statement. You do not need to type the leading zeros.

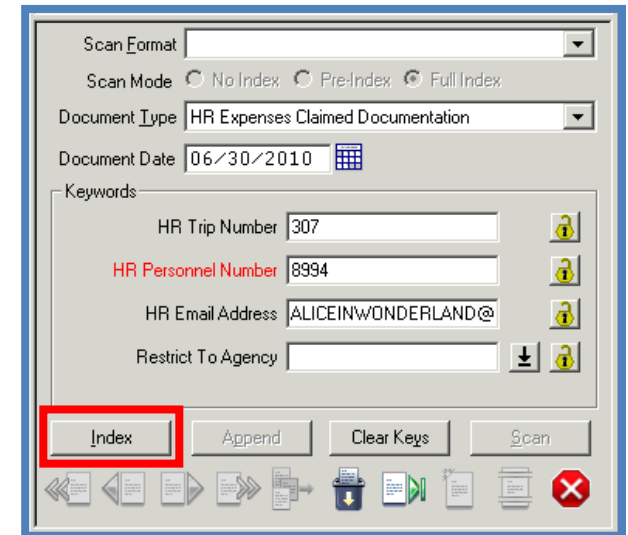


Press the Tab key after typing the HR Trip Number.

The system will fill in the HR Personnel Number.

If your agency maintains email addresses in SAP the email address will also be filled in.

Click the 'Index' button.



Sweeping is complete.

The images are attached to your trip in SAP.

You will receive a mail item confirming that scanning is complete. The mail will arrive in your external email if the system filled in the HR Email Address when you entered the Trip Number. Otherwise the mail will arrive in your MySCEmployee Universal Work List (UWL).

You should now open the trip in MySCEmployee to "SAVE AND SEND FOR APPROVAL".

Instructions for Imaging Travel Reports / Expense Statements

Appendix 1: Reference Slides from Travel Management Course TV120

Create Expense Report (Save)

If the expense report is not ready for submission because supporting documentation is required to be imaged, you should print the report by clicking the **Display Expense Form** button prior to saving the document. Attach any required documents (e.g. receipts) to the printed report and send to the person designated by your agency to perform imaging activities. When imaging is completed, you should receive an email notification. Only then should you use the **Save and Send for Approval** button.

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Create Expense Report (Review and Send)

Once all items have been scanned, if appropriate, then should you use the **Save and Send for Approval** button. You will receive a notification by email once your documentation is imaged.

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Create Expense Report (Display Expense Report)

After clicking the Display Expense Form link, a PDF version of the Travel Report is generated in a new window. After viewing, printing or saving the file, you can simply click the X in the upper right-hand corner to close the window. Print this report and use it as a cover page when sending your documentation for imaging. Ensure that the trip number is printed under the bar code.

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My Travel and Expenses (Create Expense Report)

As indicated below, the **Save and Send for Approval** button is the last step in submitting an Expense Report.

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