



**State of Wisconsin  
Department of Administration**

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**Adding Attachments in STAR FIN/PRO  
Job Aid**

**Version 1.0**

**Version History**

| Version | Date     | Editor        | Description     |
|---------|----------|---------------|-----------------|
| 1.0     | 12/22/17 | STAR Training | Initial Release |
|         |          |               |                 |
|         |          |               |                 |



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## PURPOSE AND DESCRIPTION

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### Purpose

This document explains the key topics involved in adding attachments in the STAR Finance/Procurement environment. It provides an overview of the transactions and roles affected and lists attachment types per transaction.

### Description

OnBase is a document management tool that will be used to store AP, EX, and P-Card attachments submitted by end-users in PeopleSoft. This is mostly a technical change; however, users will be required to select an *Attachment Type* when uploading attachments to the following transactions in STAR:

- **Accounts Payable (AP):** Voucher; Payment Request
- **Purchase Order (PO):** PCard Receipts
- **Expense (EX):** Travel Authorization; Travel Cash Advance; Travel Expense Report

This document will be updated as additional transaction and attachment types are completed throughout the OnBase document management roll-out. Any changes to policy will be communicated by the State Controller’s Office and the State Bureau of Procurement or your agency.

## ADDING ATTACHMENTS

Procedures for adding attachments have not changed however users will be required to select an *Attachment Type* when uploading attachments to the following transactions in STAR:

- **Accounts Payable (AP):** Voucher; Payment Request
- **Purchase Order (PO):** PCard Receipts
- **Expense (EX):** Travel Authorization; Travel Cash Advance; Travel Expense Report


**NOTE:** This change does not require attachments be added to transactions. You should refer to your agency’s policies related to required attachments.

Below are the steps for adding an attachment in PeopleSoft. In the *Appendix* you will find the *Attachment Types* used in each of the transactions.

- To add attachments, navigate in PeopleSoft to the transaction the attachment relates to (i.e. open your Expense Report for the travel the receipt is related to). The example below shows the process in Expense Reports, but is similar from the *Attachments* link on the other AP and P-Card screens.

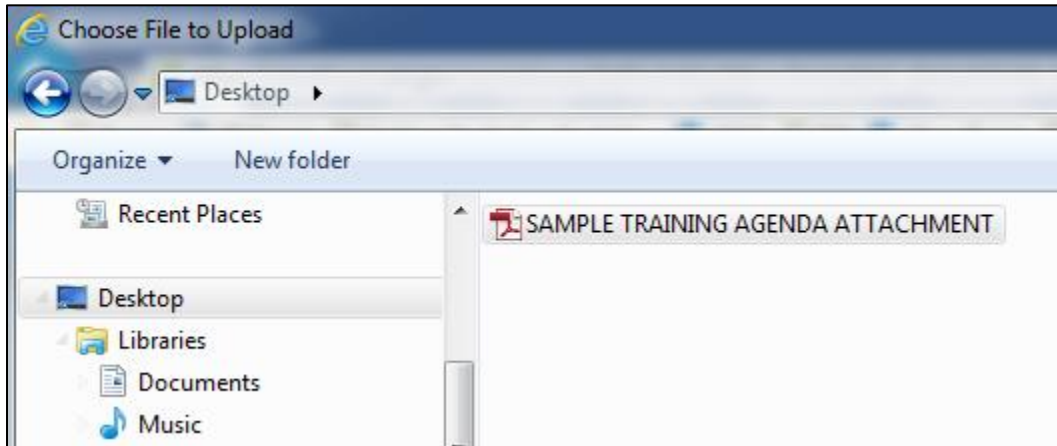


- Fill in the required (\*) and optional fields for the transaction.
- To add an attachment, click the **Attachments** hyperlink to bring up the Attachments Uploader.
  - Click **Add Attachment**.

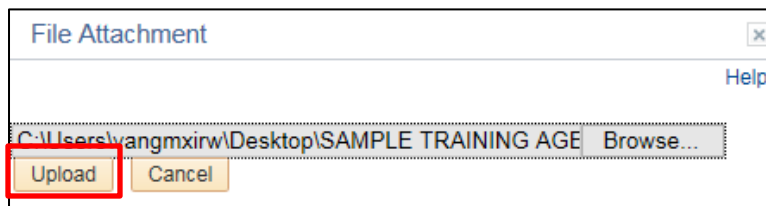


| File Name | Description | *Attachment Type     | User | Name | Date/Time Stamp |
|-----------|-------------|----------------------|------|------|-----------------|
| View      |             | Travel Authorization |      |      |                 |

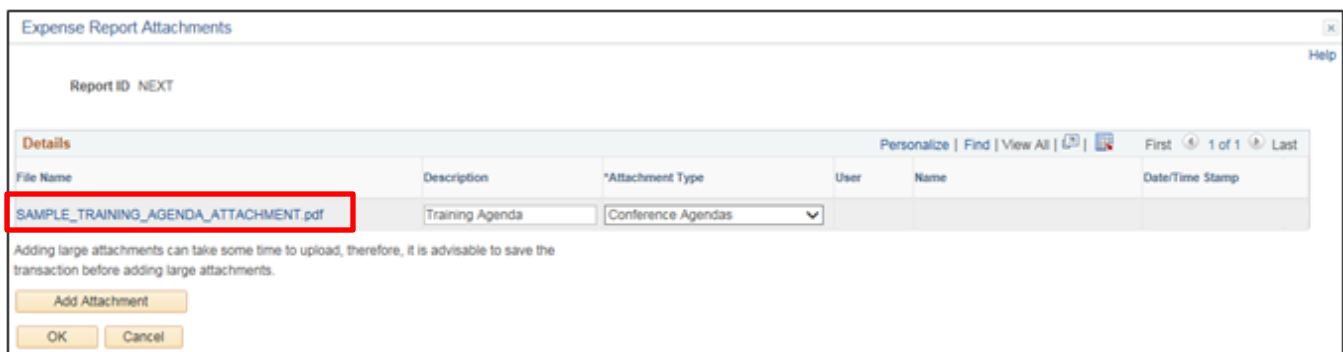
- A pop-up **File Attachment** window will appear.
  - Click **Browse** to search for an attachment from your computer.



- Once a file is selected, click **Upload**.



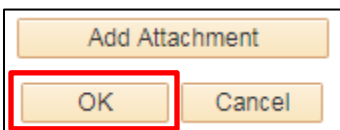
- The Uploader will display the attachment in the **Details** grid once the upload completes.



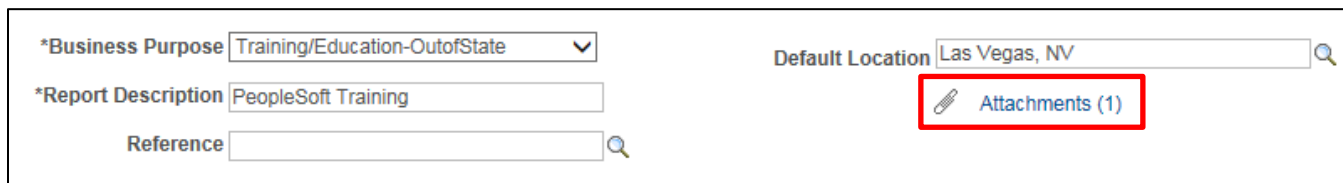
- **File Name:** The file name defaults to the original name of the attachment as it was saved on your computer.
- **Description:** *Optional.* Enter a description for the attachment. This field can also be used if an attachment was mistakenly attached and could not be deleted (i.e. “This document was attached in error.”). (100 characters max.)
- **Attachment Type:** *Required.* By default, the *Attachment Type* defaults to the most common type of attachment for the transaction type. Review and update to a different *Attachment Type* if required.
- **User:** This field will populate with the attachment uploader’s IAM.
- **Name:** This field will populate with the attachment uploader’s name.



- **Date/Time Stamp:** This field displays the date/time the attachment was uploaded/submitted.
- Once you've completed adding attachments, click **OK** to exit the Uploader.



- The transaction screen will display the number of attachments included in the transaction:



- If additional attachments need to be uploaded to the transaction, click the **Attachments** hyperlink to continue adding.

**NOTES:** See specific job aids for more detailed instructions.

- **For Expense:**
  - **Employee** - Once the expense report has been saved, attachments cannot be removed. Additional attachments can be added. Once the expense report is submitted, attachments cannot be added or removed.
  - **Supervisor** – Cannot remove existing attachments. Additional attachments can be added (remember to Save). Once approved, attachments cannot be added or removed.
  - **Prepay Auditor** - Cannot remove existing attachments. Additional attachments can be added (remember to Save). Once approved, attachments cannot be added or removed.
- **For AP:**
  - **Payment Requester:** If the transaction has been saved, attachments can be added; however, previous attachments cannot be removed. Once submitted, attachments cannot be added or removed.
  - **AP Processor:** Once the transaction has been saved, attachments cannot be removed. Additional attachments can be added.
  - **AP Approver:** Once the transaction has been approved, attachments cannot be removed.
- **For P-Card:**
  - **Agency P-Card Approver:** Multiple attachments can be added at any point during the cycle, from 'Staged' to 'Closed'. Once saved, attachments cannot be removed.
  - **Agency P-Card Reconciler:** Multiple attachments can be added at any point during the cycle, from 'Staged' to 'Closed'. Once saved, attachments cannot be removed.
  - **Agency P-Card Administrator:** Multiple attachments can be added at any point in the cycle, from 'Staged' to 'Closed'. Once saved, attachments cannot be removed.

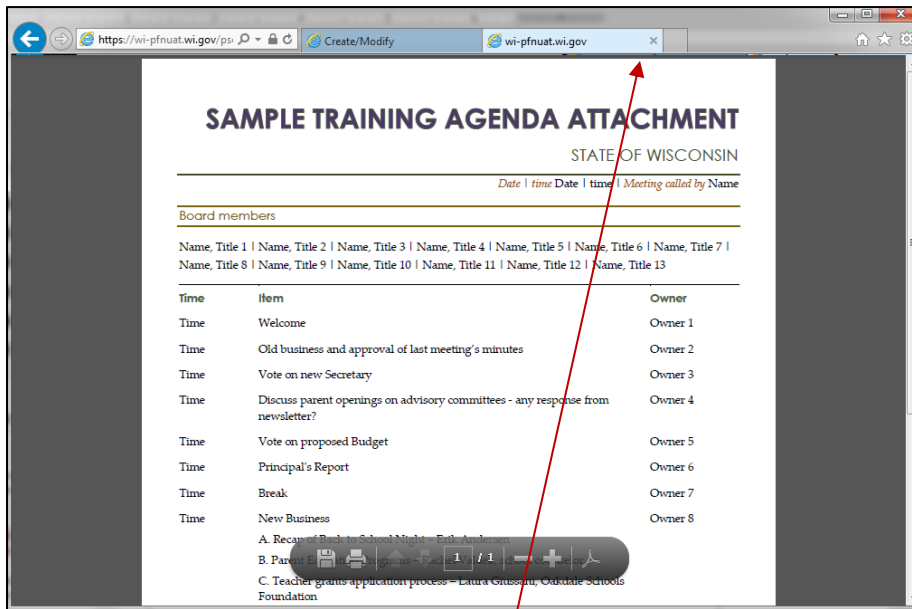
## VIEWING ATTACHMENTS

Below are the steps for viewing an attachment in PeopleSoft.

- To view attachments, navigate in PeopleSoft to the transaction. The example below shows the process in Expense Reports, but is similar from the *Attachments* link on the other AP and P-Card screens.

- Click the **Attachments** hyperlink.
  - The number to the right of the hyperlink indicates the number of attached files.
- In the Details grid, click the **File Name** hyperlink to view that attachment.
  - Attachments open in a new window tab.

| File Name   | Description     | *Attachment Type   | User | Name | Date/Time Stamp |
|---|-----------------|--------------------|------|------|-----------------|
| <a href="#">SAMPLE_TRAINING_AGENDA_ATTACHMENT.pdf</a> | Training Agenda | Conference Agendas |      |      |                 |



- Click the **X** on the window tab to return to the transaction screen.



## APPENDIX

### ACCOUNTS PAYABLE TRANSACTION AND ATTACHMENT TYPES

**Roles Affected:** AP Processors, AP Approvers, AP Maintainers

The following grid displays the Attachment Types that are available on AP transactions:

| AP VOUCHER                 | AP PAYMENT REQUEST         |
|----------------------------|----------------------------|
| AP-Invoice                 | AP-Invoice                 |
| AP-Invoice Resolution Form | AP-Invoice Resolution Form |
| Packing Slip               | Packing Slip               |
| DOR Intercept Notes        | DOR Intercept Notes        |
| Other Related Documents    | Other Related Documents    |

### EXPENSES TRANSACTIONS AND ATTACHMENT TYPES

**Roles Affected:** Staff with Travel, Staff Supervisors, Payment Requestors

The following grid displays the Attachment Types that are available on Travel Expense transactions:

| TRAVEL EXPENSE                    | TRAVEL CASH ADVANCE     | TRAVEL AUTHORIZATION    |
|-----------------------------------|-------------------------|-------------------------|
| Break Expenses                    | Other Related Documents | Travel Authorization    |
| Conference Agendas                | Approval Form           | Conference Agendas      |
| Fleet Non-Availability Slip       |                         | Other Related Documents |
| Hotel Receipts                    |                         |                         |
| Non-Travel Expense Documents      |                         |                         |
| Other Related Documents (Default) |                         |                         |
| Travel Authorization              |                         |                         |
| Travel Receipts                   |                         |                         |

### PROCUREMENT CARD TRANSACTION AND ATTACHMENT TYPES

**Roles Affected:** P-Card Reconciler Roles: AGENCY\_P-CARD ADMINISTRATOR, AGENCY\_P-CARD\_APPROVER, AGENCY\_P-CARD\_RECONCILER, AGENCY\_P-CARD\_REVIEWER

The following grid displays the Attachment Types that are available on P-Card transactions:

| PROCUREMENT CARD  |
|-------------------|
| PCard Receipt     |
| Related Documents |