

Imaging Expense Reports and PCard Purchase Detail Reports via Email

A new method is now available for submitting Expense report and PCard documentation to ImageNow. It allows users to scan and submit documentation directly into ImageNow by email for individual Expense or PCard reports. This new method is another option, **in addition** to the scanning currently performed in Clusters and Disbursement Services.

What You Will Need:

- A valid University of Minnesota email address (umn.edu)
- The PeopleSoft generated bar coded cover sheet for the Expense or PCard report, with all required support documentation.

Step-By-Step Instructions:

- Step 1.* Print the Expense Report or the PCard Purchase Detail bar coded cover sheet.
- Step 2.* Scan the entire report, with all required receipts, using your local scanner or multi-function printer/copier. Many departments have multi-function printers/copiers with a 'Scan to Email' function. Staff should email the documents to their University email address and then forward the message to one of the email addresses listed below, listing the document ID in the subject line. To change the subject of your message, click the arrow next to the recipient's name and click "Edit Subject".
- Step 3.* Create an email with the document ID, obtained from the bar coded cover sheet, as the subject line. The document ID in the subject line is critical, it must be identical to the number appearing on the cover sheet:
- **Expense Reports:** The 10 character document ID with any leading zeroes. This must be exactly 10 digits.
 - **PCard Reports:** The 19 digit document ID number (Empl ID, last 4 digits of the card number, and billing cycle close date).
- Step 4.* Attach the scanned documentation to the email.
- Step 5.* Send the email to the appropriate email address listed below (1).
- Step 6.* Retain the paper copies for 90 days, then destroy.

Email Method Requirements

Document Type	Subject line	Subject line format (ID obtained from cover sheet)	Email address (1)
Expense Report	ER document ID	0000777777	erimg@umn.edu
PCard Purchase Detail Report	Employee ID Last 4 digits of card # Billing date (mmdyyy)	1234567-1052-12242012 OR 1234567105212242012	pcardimg@umn.edu

Additional Information:

- Access to ImageNow is NOT required to use this process.
- If an error is made in the document ID in the subject line, a notification email to correct it will be sent to the sender.
- To append to an existing image, simply use the existing image document ID in the email subject line.
- If an image needs to be deleted, contact the Financial Helpline at 612-624-1617.

Recommendations from the OIT Imaging Team

Recommended practice is to scan documents in grayscale at 200 DPI. Scanning documents in higher resolutions will not provide a meaningful quality improvement and will use excessive space in ImageNow. Gmail has an attachment limit of 25 megabytes. At the recommended resolutions this allows 100+ pages. Talk to your department's IT group for guidance on scanning resolution, file sizes, and attachments.