

# DocStar

Last Updated August 25, 2022

**What** DocStar is used to index and approve invoices so they can be approved in Banner. You can also search for your department's invoices.

**When** This is done as invoices are entered so there is no hold up in paying invoices.

**Where** DocStar is located in your Portal under the "My Programs" section. It is titled "Document Management (DocStar Eclipse)."

Scan - Contact UCS if your scanner or copy machine is not set up to scan to your DocStar folder. It can take up to 5 minutes from scanning the document to it showing up in DocStar for indexing.

Download – You will need a shortcut on your desktop to be able to download your documents directly to DocStar. See the instructions below to set up the shortcut to do that.

## “Download Shortcut” Instructions

### PC

Open “File Explorer”. It looks like a manila file folder and it is located at the bottom of the screen.



Double click on your I: (I drive)

Right click on the file folder called “doc\_management”.

Click on “Copy”.

Close the “File Explorer” window.

Find an open space on your desktop and right click on it.

Click on “Paste shortcut”.

You can rename the shortcut if you would like to. Suggestion to name it “DocStar”.

## Mac

Open Finder, then click the GO menu at the top

In that drop-down of the GO menu, click Connect to Server (near the bottom)

Here's what you type in: `smb://groupa.wou.edu/groupa/departmentname`

Before you hit the "Connect or Finish" button, click the + icon square to add it to your favorites for you to use later!

## How to download invoices

Open the shortcut by double clicking on it.

You can drag the document to the “AP” folder and drop it there. Make sure that it was copied and did not move the original document. Or you can copy and paste it to the “AP” folder to ensure that you don’t lose your original document.

### **Step 1 - Scan or download the invoice into DocStar**

### **Step 2 – Indexing in DocStar**

1. Click on “(Your Dept name) AP”. This will give you a list of the documents that are needing to be indexed.

DocStar® Home Retrieve Capture Workflow Reports Admin  Clear

▼ Items & Locations

▼ Search Fields

▼ Text

Actions ▼ Limit: 10

<input checked="" type="checkbox"/>	Edit	Type	Title	BizSrv. Banner	BizSrv. Revolt	Created On	Modified On	Document Status	Created By	Modified By	Co
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_012858_243445			4/14/2023 10:35 AM	4/14/2023 10:35 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_012515_243429			4/14/2023 10:35 AM	4/14/2023 10:35 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_012006_243425			4/14/2023 10:25 AM	4/14/2023 10:25 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_011639_243419			4/14/2023 10:25 AM	4/14/2023 10:25 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_011249_243413			4/14/2023 10:15 AM	4/14/2023 10:15 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_010904_243405			4/14/2023 10:15 AM	4/14/2023 10:15 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_010436_243397			4/14/2023 10:15 AM	4/14/2023 10:15 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_010133_243393			4/14/2023 10:05 AM	4/14/2023 10:05 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_005821_243387			4/14/2023 10:05 AM	4/14/2023 10:05 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz
<input checked="" type="checkbox"/>			scanner-business.wou.edu_20160103_005016_243383			4/14/2023 9:55 AM	4/14/2023 9:55 AM	Not Indexed	admin@docstar.com	Workflow Proxy	Biz

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2. Click on the box just above the first invoice that is needing indexed and approved
3. Click on "Actions."
4. Click on "View". It is at the top of the list.

## Inboxes

- Advancement
- BizSrv
- BizSrv AP
- BizSrv: Contracts
- BizSrv: Revolving Charge
- BizSrv: Substitute W-9
- P Card Reports

## Folders

- Advancement
- Business Services

## Alerts

- Workflows (20)
- Approvals (1)
- Recent Documents

Viewing Item 1 of 10

## Workflow

Workflow: OSNAP Invoice User Input  
Current Step: User Indexing (with I#)  
Current Action: Get indexing info  
Assignee: BizSrv AP

Banner Invoice #:

Invoice Amount:

Back

Submit



## Content Fields

Content Type:

BizSrv AP

Title:

scanner-business.wou.edu 201601

BizSrv: Banner Invoice Number:

AP: Vendor Name:

BizSrv: Banner Invoice Date:

BizSrv: Invoice Amount:

DocumentCategory:

DocumentType:

ALL: Last Name:

ALL: First Name:

Save

Add Field

Not Indexed

Actions 1 of 4 Item 1 of 4

POST-TRAVEL REIMBURSEMENT REQUEST  
REFERENCE WOU TRAVEL POLICIES AND RATES TO COMPLETE THIS FORM

SECTION A  
NAME: [REDACTED] WOU WF: [REDACTED]  
STREET: [REDACTED] DESTINATION: Various  
CITY, ST, ZIP: McMinnville, OR 97128  
WorkStation: WOU HOME XX Are you working remotely? Yes No XX  
DEPARTMENT: Clinical Practice & Librarians PURPOSE: Supervision student teachers  
EMPLOYEE XX \*STUDENT NON-WOU

SECTION B  
MILEAGE SUMMARY - PRIVATE AUTO  
MILES TOTAL 160.00 TOTAL 160.00  
MILEAGE TOTAL 160.00 TOTAL 160.00

SECTION C & D  
OTHER EXPENSES PAID: Airfare, Parking, Cabs, Etc.  
PCARD/DIRECT BILL EXPENSES TOTAL PERSONAL EXPENSES TOTAL  
Procurement Expenses Subtotal \$0.00 Personal Expenses Subtotal \$0.00  
Form Prepared by: Kathy Heide Total Reimbursable Travel Expenses \$67.99

SECTION E: INDEX CODE/ APPROVAL REQUIRED  
INDEX CODE ACTV CODE AMOUNT  
CPL 901 09415 \$65.50  
CPL 901 09415 \$2.49  
TOTAL \$67.99  
Advance Travel Meals Per Diem (if applicable):  
Additional NOTES (if Applicable): Taxable

To Clear TA: [REDACTED]  
To Clear TC: [REDACTED]  
TOTAL \$67.99  
BUSINESS OFFICE USE ONLY:  
BUS OFF REVIEW BY: [REDACTED] 4/13/23  
INVOICE NO: 1052468480  
CHECK NO: 4-14-23  
TOTAL MEALS AND LODGING: \$1150  
LAPRISE: \$1150  
OTHER: \$1150  
To Clear TA (if Applicable) TA REVIEW: [REDACTED]  
To Clear TC (if Applicable) TC REVIEW: [REDACTED]  
TOTAL EXPENSES: \$67.99  
I (the claimant) certify that this claim is true and correct. That no part thereof has been previously claimed or will be claimed from any other source.

CLERK SIGNATURE DATE DIRECTOR/DEPUTY CHAIRMAN or PRESIDENT SIGNATURE DATE

DocStar® Home Retrieve Capture Workflow Reports Admin  Clear

Viewing Item 1 of 10

Workflow

Workflow: OSNAP Invoice User Input  
Current Step: User Indexing (with I#)  
Current Action: Get indexing info  
Assignee: BizSrv AP

Banner Invoice #:

Invoice Amount:

Back

Content Fields

Content Type: BizSrv AP

Title: scanner-business.wou.edu 201601

BizSrv: Banner Invoice Number:

AP: Vendor Name:

BizSrv: Banner Invoice Date:

BizSrv: Invoice Amount:

DocumentCategory:

DocumentType:

ALL: Last Name:

ALL: First Name:

Not Indexed

Actions

POST-TRAVEL REIMBURSEMENT REQUEST  
REFERENCE WOU TRAVEL POLICIES AND RATES TO COMPLETE THIS FORM

SECTION A

NAME:  WOU ID:   
STREET:  DESTINATION:   
CITY, ST, ZIP: McMinnville, OR 97128 Are you working remotely? Yes ☒ No ☐  
DEPARTMENT: Clinical Practice & Licensure PURPOSE: Supervision student teachers  
EMPLOYEE: ☒ STUDENT ☐ NON-WOU

SECTION B MILEAGE SUMMARY - PRIVATE AUTO

MILES	TOTAL
MILEAGE TOTAL	103.80
	\$67.99

SECTION C & D OTHER EXPENSES PAID: Airfare, Parking, Cabs, Etc.

PCARD/DIRECT BILL EXPENSES	TOTAL	PERSONAL EXPENSES	TOTAL
Procurement Expenses Subtotal	\$0.00	Personal Expense Subtotal	\$0.00

Form Prepared by: Kathy Hoide Total Reimbursable Travel Expenses \$67.99

SECTION E: INDEX CODE/AMOUNT REQUIRED

INDEX CODE	ACTV CODE	AMOUNT EXPENSED
CPL 901	39415	\$50.50
CPL 901	39712	\$2.49
TOTAL		\$52.99

Additional NOTES (if Applicable): Taxable

BUSINESS OFFICE USE ONLY:  
BUS OFF REVIEW BY: ☒ 4/13/23  
INVOICE NO: 10561684  
CHECK NO: 4-14-23  
TOTAL MEALS AND LODGING: 91100  
AIRFARE: 91130  
OTHER: 91120  
To Clear TA (if Applicable) TA REVIEW: \$67.99  
To Clear TC (if Applicable) \$67.99  
TOTAL EXPENSES: \$67.99

CLAIMANT: SIGNATURE / DATE DIRECTOR/DIVISION CHAIR/VP or PRESIDENT: SIGNATURE / DATE

- Type the "1" number in the "Banner Invoice Number:" box. Make sure to capitalize the "1".
- Press Tab.
- Type the amount in the "Invoice Amount:" box. If the amount is a whole dollar and not change you only need to put the amount before the .00. Make sure to put a "-" before the number if it is a credit. i.e. -256.56
- Click on "Submit".

- Inboxes
  - Advancement
  - BizSrv
  - BizSrv AP
  - BizSrv: Contracts
  - BizSrv: Revolving Charge
  - BizSrv: Substitute W-9
  - P Card Reports

- Folders
  - Advancement
  - Business Services

- Alerts
- Workflows (20)
- Approvals (1)
- Recent Documents

Viewing Item 1 of 10

## Workflow

Workflow: OSNAP Invoice User Input  
Current Step: User Indexing (with I#)  
Current Action: Get indexing info  
Assignee: BizSrv AP

Banner Invoice #: 10561684

Invoice Amount: 67.99

Back

Submit



## Content Fields

Content Type: BizSrv AP

Title: scanner-business.wou.edu 201601

BizSrv: Banner Invoice Number:

AP: Vendor Name:

BizSrv: Banner Invoice Date:

BizSrv: Invoice Amount:

DocumentCategory:

DocumentType:

ALL: Last Name:

ALL: First Name:

Save

Add Field

Not Indexed

Actions

Viewing Item 1 of 4



POST-TRAVEL REIMBURSEMENT REQUEST  
REFERENCE WOU TRAVEL POLICIES AND RATES TO COMPLETE THIS FORM

Western Oregon UNIVERSITY

SECTION A

NAME: [REDACTED] WOU V#: [REDACTED]  
STREET: [REDACTED] DESTINATION: Various  
CITY, ST, ZIP: McMinnville, OR 97128  
Permanent Workstation: WOU HOME XX Are you working remotely? Yes No XX  
DEPARTMENT: Clinical Practice & Licensure PURPOSE: Supervision student teachers  
EMPLOYEE XX \*STUDENT NON-WOU

SECTION B MILEAGE SUMMARY - PRIVATE AUTO

MILES	TOTAL
MILEAGE TOTAL	103.80
	\$67.99

SECTION C & D OTHER EXPENSES PAID: Airfare, Parking, Cabs, Etc.

PCARD/DIRECT BILL EXPENSES	TOTAL	PERSONAL EXPENSES	TOTAL
Procurement Expenses Subtotal	\$0.00	Personal Expense Subtotal	\$0.00

Form Prepared by: Kathy Hoide  
Total Reimbursable Travel Expenses \$67.99

SECTION E: INDEX CODE/AMOUNT REQUIRED

INDEX CODE	ACTV CODE	AMOUNT EXPENSED
CPL 901	39415	\$50.50
CPL 901	39712	\$2.49

Additional NOTES (if Applicable): Taxable

To Clear TA  
To Clear TC

BUSINESS OFFICE USE ONLY:  
BUS OFF REVIEW BY: xxv 4/13/23  
INVOICE NO: 10561684  
CHECK NO: 4-14-23  
TOTAL MEALS AND LODGING: 91100  
AIRFARE: 91130  
OTHER: 91120  
To Clear TA (if Applicable) TA REVIEW  
To Clear TC (if Applicable) TC REVIEW

TOTAL EXPENSES: \$67.99

I, the claimant, certify that this claim is true and correct, that no part thereof has been heretofore claimed or will be claimed from any other source.

CLAIMANT: SIGNATURE / DATE DIRECTOR/DIVISION CHAIR/VP or PRESIDENT: SIGNATURE / DATE



DocStar®

Home

Retrieve

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DocStar

Inboxes

Advancement

BizSrv

BizSrv AP

BizSrv: Contracts

BizSrv: Revolving Charge

BizSrv: Substitute W-9

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Workflows (20)

Approvals (1)

Recent Documents

Viewing Item

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Workflow

Workflow:

OSNAP Routing  

Current Step:

Indexing Approval  

Current Action:

OSNAP: Approve Indexing(Part 2)  

Assignee:

BizSrv AP Approvers

Please make sure that the Content Fields match what is on the page, then approve or deny this document.

Approve

Back

Submit

Content Fields

Content Type:

BizSrv AP  

Title:

Invoice I0561684: \$67.99  

BizSrv: Banner Invoice Number:

I0561684  

AP: Vendor Name:

  

BizSrv: Banner Invoice Date:

4/14/2023  

BizSrv: Invoice Amount:

67.99  

DocumentCategory:

AP  

DocumentType:

Invoice  

ALL: Last Name:

  

ALL: First Name:

Save

Add Field

Indexed

Actions

Item

1

of 4

POST-TRAVEL REIMBURSEMENT REQUEST

REFERENCE WOU TRAVEL POLICIES AND RATES TO COMPLETE THIS FORM

Western Oregon UNIVERSITY

SECTION A

NAME:

WOU V#:

  

STREET:

DESTINATION:

Various  

CITY, ST, ZIP:

McMinnville, OR 97128  

Permanent Workstation:

WOU HOME XX Are you working remotely? Yes No XX  

DEPARTMENT:

Clinical Practice & Lecturers 

PURPOSE:

Supervision student teachers  

EMPLOYEE

XX \*STUDENT NON-WOU

SECTION B

MILEAGE SUMMARY - PRIVATE AUTO.

MILES

TOTAL

103.80

\$67.99

  

SECTION C & D

OTHER EXPENSES PAID: Airfare, Parking, Cabs, Etc.

PCARD/DIRECT BILL EXPENSES

TOTAL

PERSONAL EXPENSES

TOTAL

  

Form Prepared by:

Kathy Heide 

Total Reimbursable Travel Expenses

\$67.99

SECTION E:

INDEX CODE/AMOUNT REQUIRED

INDEX CODE

ACCT CODE

ACTV CODE

AMOUNT EXPENSED

Advance Travel Meals PerDiem (If Applicable)

  

CPL 901

39415

\$55.50

  

CPL 901

39712

\$2.49

Taxable

BUSINESS OFFICE USE ONLY:

BUS OFF REVIEW BY:

xxv 4/13/23  

INVOICE NO:

I0561684  

CHECK NO:

4-14-23  

TOTAL MEALS AND LODGING:

91100  

AIRFARE:

91130  

OTHER:

91120  

TOTAL EXPENSES:

\$67.99  

CLAIMANT: SIGNATURE / DATE

DIRECTOR/DIVISION CHAIR/VP or PRESIDENT: SIGNATURE / DATE

- Make sure the "AP: Vendor Name" matches the vendor on the document. If the name is different, make sure the VNumber matches.
- If everything is correct, click on "Submit".
- It will either say "Verified" or "Processed" in the red box above the invoice after you index and approve the document. It is now in DocStar so the document can be approved and processed for payment.