

# 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   Incl. Cols.   Clear

<input checked="" type="checkbox"/>	Edit	Type	Title	BizSrv: Banner	BizSrv: Revolv	Created On	Modified On	Document Status	Created By	Modified By	Co
<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	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

Page 1 of 2     Viewing 1 - 10 of 18

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 #)  
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 ▾ 1 of 4

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

**SECTION A**

NAME:  WOU VF:   
STREET:  DESTINATION:   
CITY, ST, ZIP: McMinnville, OR 97128  
PARKING:  WOU  HOME  XX  
Are you working remotely? Yes  No   
DEPARTMENT: Clinical Practice & Curae  PURPOSE: Supervision student teachers  
EMPLOYEE:  STUDENT  FSA Pre-Approved & Additional  NON-WOU

**SECTION B MILEAGE SUMMARY - PRIVATE AUTO**

	MILES	TOTAL
MILEAGE TOTAL	150.40	\$67.99

**SECTION C & D OTHER EXPENSES PAID: Airlines, 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 Heids  Total Reimbursable Travel Expenses \$67.99

**SECTION E CHECK CODE APPROVAL REQUIRED**

INDEX CODE	ACCT CODE	ACTV CODE	AMOUNT EXPENDED	Advance Travel Meets PerDiem <input type="checkbox"/> (If applicable)
CPL 901	30415		\$65.50	
CPL 901	39712		\$2.49	Additional NOTES (If Applicable): Taxable

To Clear TA  To Clear TC

**BUSINESS OFFICE USE ONLY:**

BUS OFF REVIEW BY:  4/13/23

INVOICE NO:  40526840

CHECK NO:

TOTAL MEALS AND LODGING:  \$1100

AIRFARE:  \$1130

OTHER:  \$1120

To Clear TA (If Applicable) TA INVR

To Clear TC (If Applicable) TC INVR

**TOTAL EXPENSES:**  \$67.99 Reviewed 01/01/2023

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

CHIEF BUSINESS OFFICER OR PRESIDENT:  SIGNATURE:  DATE:

CHIEF BUSINESS OFFICER OR PRESIDENT:  SIGNATURE:  DATE:

Page 1 of 1 Printed Date: 04/13/2023 3/2023

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

Banner Invoice #: 10561684

Invoice Amount: 57.99

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 Save

Not Indexed

Actions ▾

Workflow 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 VP: [REDACTED]  
STREET: [REDACTED] DESTINATION: Various  
CITY, ST, ZIP: McMinnville, OR 97128 (City and State, or if Foreign, 1st City and Country below)  
Permanent Workstation: WOU HOME XX Are you working remotely? Yes XX No XX

DEPARTMENT: Clinical Practice & Licensure PURPOSE: Supervision student Teachers

EMPLOYEE: XX \*STUDENT NON-WOU (P-Visa Pre-approved & Additional form required)

**SECTION B**

MILEAGE SUMMARY - PRIVATE AUTO	MILES	TOTAL
MILEAGE TOTAL	103.80	\$67.99

**SECTION C & D**

OTHER EXPENSES PAID: Airfares, Parking, Cab, Etc.	PERSONAL EXPENSES	TOTAL	
PCARD/DIRECT BILL EXPENSES	TOTAL		
Procurement Expenses Subtotal	\$0.00	Personal Expense Subtotal	\$0.00

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

**SECTION E: INDEX CODE/ APPROVAL REQUIRED**

INDEX CODE	ACCT CODE	ACTV CODE	AMOUNT EXPENDED	Advance Travel Meals Per Diem (If applicable)
CPL 901	39415		\$66.50	
CPL 901	39712		\$2.49	Additional NOTES (If applicable): Taxable

To Clear TA Save Add Field

To Clear TC Save Add Field

**BUSINESS OFFICE USE ONLY:**  
BUS OFF REVIEW BY: *xxv 4/13/23*  
INVOICE NO: *10561684* *4/14/23*  
CHECK NO: *4/14/23*

TOTAL MEALS AND LODGING:	91100
AIRFARE	91130
OTHER	91120

To Clear TA (If Applicable) TA INV# *4/14/23*  
To Clear TC (If Applicable) *4/14/23*

**TOTAL EXPENSES:** \$67.99 Reviewed 01/01/2023

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/VICE CHAIR VP OR PRESIDENT: SIGNATURE / DATE  
PRINT NAME

- Type the "I" number in the "Banner Invoice Number:" box. Make sure to capitalize the "I".
- 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: OSNAP Invoice User Input  
Current Step: User Indexing (with #)  
Current Action: Get indexing info  
Assignee: BizSrv AP

Banner Invoice #: 10561684

Invoice Amount: 67.99

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 ▾  1 of 4

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

Not Indexed

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

SECTION A

NAME: [REDACTED] WOU VF: [REDACTED]

STREET: [REDACTED] DESTINATION: Various

CITY, ST, ZIP: McMinnville, OR 97128 (City and State, or if Foreign, 1st City and Country below)

Permanent WorkStation: WOU HOME XX Are you working remotely? Yes XX No XX

DEPARTMENT: Clinical Practice & Licensure PURPOSE: Supervision student Teachers

EMPLOYEE: XX \*STUDENT NON-WOU (PCPA Pre-approved & Additional Item required)

SECTION B MILEAGE SUMMARY - PRIVATE AUTO

	MILES	TOTAL
MILEAGE TOTAL	103.80	\$67.99

SECTION C & D OTHER EXPENSES PAID: Airfares, Parking, Cab, Etc.

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

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

SECTION E INDEX CODE/ APPROVAL REQUIRED

INDEX CODE	ACCT CODE	ACTV CODE	AMOUNT EXPENDED	Advance Travel Meals Per Diem (INV if applicable)
CPL 901	39415		\$66.50	
CPL 901	39712		\$2.49	Additional NOTES (if applicable): Taxable

To Clear TA

To Clear TC

BUS OFFICE USE ONLY: BUS OFF REVIEW BY:  4/13/23

INVOICE NO: 1056168400 CHECK NO: 411423

TOTAL MEALS AND LODGING: 91100 AIRFARE: 91130 OTHER: 91120

To Clear TA (if Applicable) TA INV#

To Clear TC (if Applicable)

TOTAL EXPENSES: \$67.99 Revised 01/01/2023

I (the claimant) certify that this claim is true and correct; 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  
PRINT NAME

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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: OSNAP Routing

Current Step: Indexing Approval

Current Action: OSNAP: Approve Indexing(Part 2)

Assignee: BizSrv AP Approvers

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

Back **Submit**

Content Fields

Content Type: BizSrv AP

Title: Invoice I0561684: \$67.99  
V001052381 - XXXXXXXXXX

BizSrv: Banner Invoice I0561684

Number:

AP: Vendor Name: XXXXXXXXXX

BizSrv: Banner Invoice 4/14/2023

Date:

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

**SECTION A**

NAME: XXXXXXXXXX WOU VP: XXXXXXXXXX

STREET: XXXXXXXXXX DESTINATION: Various  
(City and State, or if Foreign, list City and Country below)

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  STUDENT  NON-WOU  
(WOU Pre-approval & Additional Form required)

**SECTION B** MILEAGE SUMMARY - PRIVATE AUTO

	MILES	TOTAL
MILEAGE TOTAL	103.80	\$67.99

**SECTION C & D** OTHER EXPENSES PAID: Airfares, Parking, Cab, Etc.  
PCARD/DIRECT BILL EXPENSES TOTAL PERSONAL EXPENSES TOTAL

Procurement Expenses Subtotal \$0.00 Personal Expense Subtotal \$0.00

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

**SECTION E** INDEX CODE/APPROVAL REQUIRED

INDEX CODE	ACCT CODE	ACTV CODE	AMOUNT EXPENDED	Advance Travel Meals Per Diem INVE (If applicable)
CPL 901	39415		\$65.50	
CPL 901	39712		\$2.49	Additional NOTES (If applicable): Taxable

To Clear TA XXXXXXXXXX TOTAL \$67.99

To Clear TC XXXXXXXXXX

**BUS OFFICE USE ONLY:** XXV 4/13/23  
BUS OFF REVIEW BY: XXXXXXXXXX

INV/DOCS NO: I0561684  
CHECK NO: 4/14/23

TOTAL MEALS AND LODGING: 91100  
AIRFARE: 91130  
OTHER: 91120

To Clear TA (If Applicable) TA INV/ XXXXXXXXXX

To Clear TC (If Applicable) XXXXXXXXXX

**TOTAL EXPENSES:** \$67.99 XXXXXXXXXX Revised 01/01/2023

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 XXXXXXXXXX DIRECTOR/VICE CHAIR/VP OR PRESIDENT: SIGNATURE / DATE XXXXXXXXXX

9. Make sure the "AP: Vendor Name" matches the vendor on the document. If the name is different, make sure the VNumber matches.
10. If everything is correct, click on "Submit".
11. 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.