

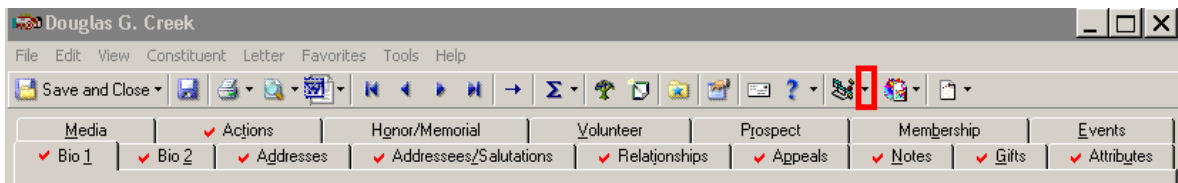


Last Updated: September 2008

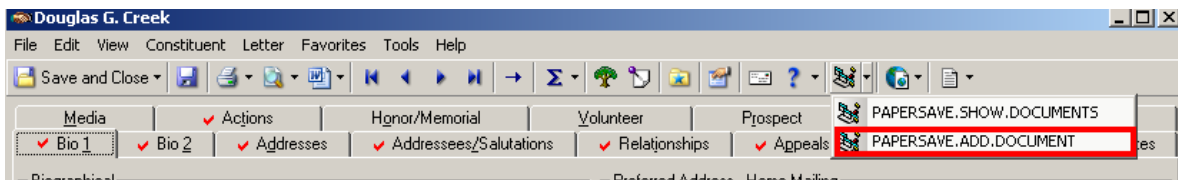
II.9 Adding Documents in Papersave

This document describes how to add documents to Papersave for Raisers Edge or Financial Edge. Note that this example uses a constituent record to demonstrate. The steps are the same for any record type.

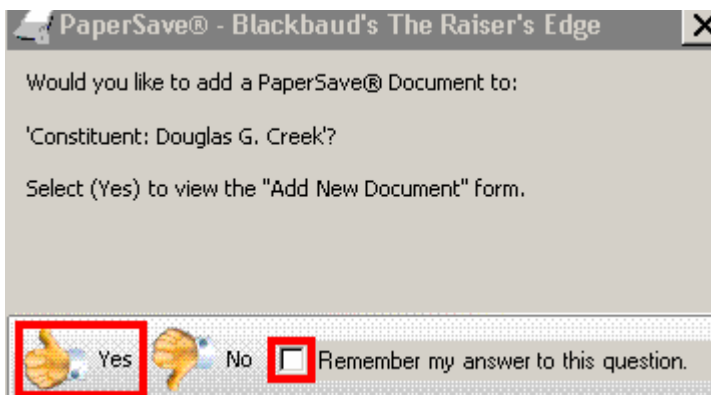
1. Open the record (in this example, 30346824, Doug Creek)
2. Click the *Macro* dropdown as indicated below



3. Select *PAPERSAVE.ADD.DOCUMENT* from the menu

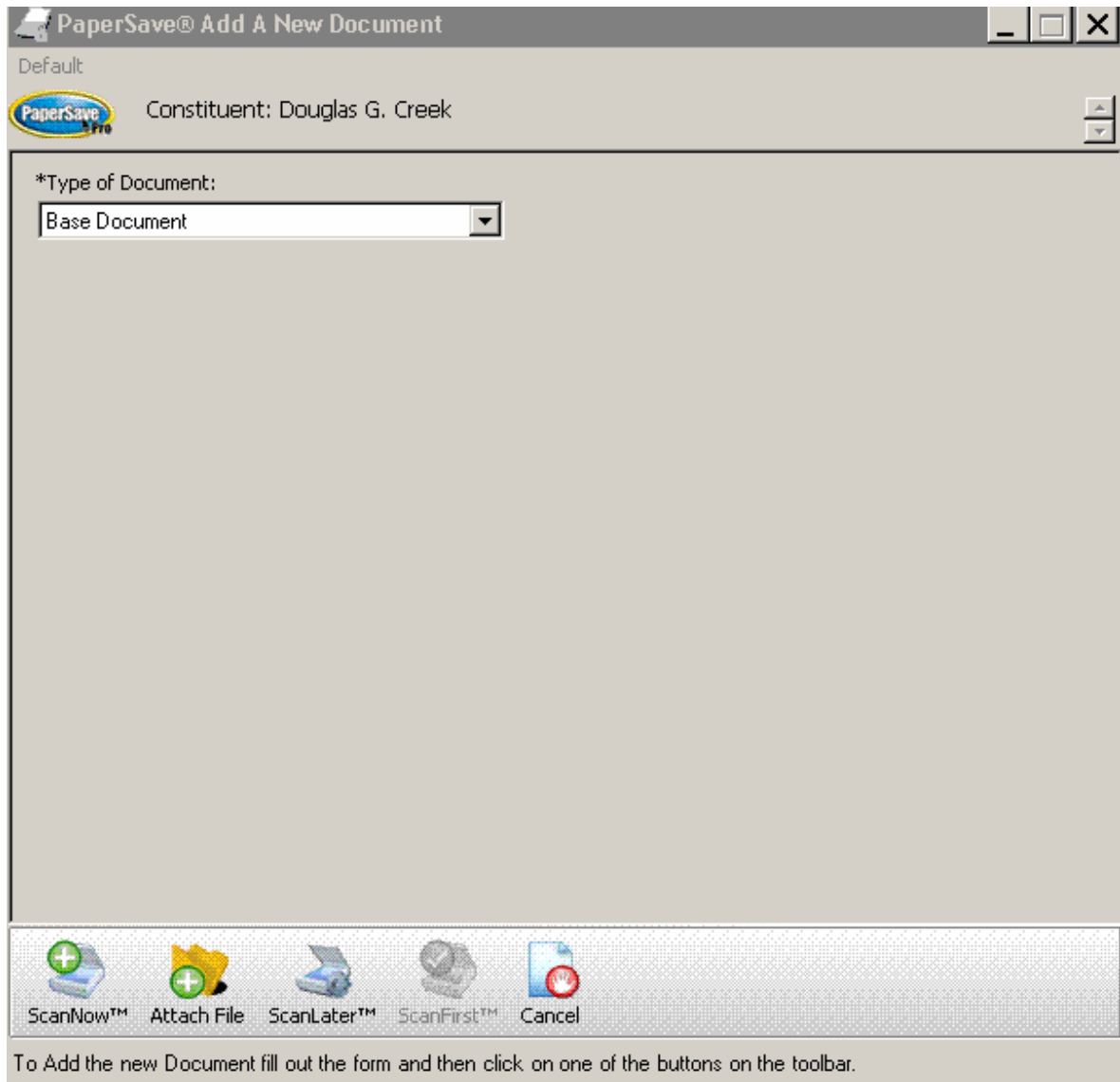


4. The following dialog box will be displayed. If you would like to turn this dialog box off, check the check box next to "Remember my answer to this question". Click *Yes* to add a new document.



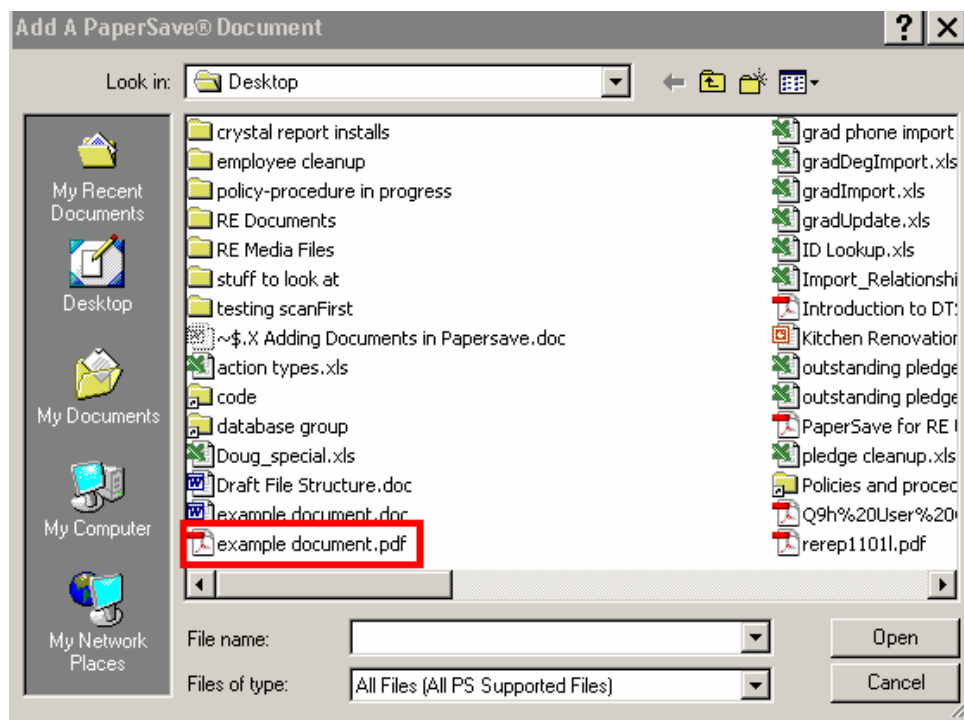


5. The Papersave “Add A New Document” window is displayed. Depending on the “Type of Document” drop down, additional options may be displayed in this window.





6. To add a document, select either *Attach File* or *ScanLater*. *ScanNow* does not function and will cause the program to close this window.
 - a. Using *Attach File*
 - i. The file browser is displayed. Navigate to the file you wish to add. You may add Word, Excel, PDF, PowerPoint, text, and image files to the system. In this example, we will add the file: “example document.pdf”. Click *Open*.



- ii. The document has now been attached to the record. To view the document, see II.10 Viewing Documents in Papersave



b. Using *ScanLater*

- i. After selecting *ScanLater*, the printer dialog box will be displayed. *ScanLater* prints a “cover page” that allows you to scan a document at your leisure, put it in a specified folder (more info later), and the system will automatically read that file in and attach it to the appropriate record. This allows for scanning to be done in large batches instead of scanning individual files. An example copy of the coversheet has been provided at the end of this document.
- ii. Combine the coversheet with the documents to be scanned
- iii. Scan the documents onto your desktop. **NOTE:** The document must be saved as a .tif image file. *ScanLater* relies on this file type.
- iv. The document is ready to be attached. Place the document in the appropriate folder (see below) and the system will automatically attach the file and remove the file. This folder is scanned approximately every 30 seconds.
 1. For the test server:
<\\chinook\vol2\founddevshare\PaperSaveTest\ScanLater>
 2. For the production server:
<\\chinook\vol2\founddevshare\PaperSaveProd\ScanLater>