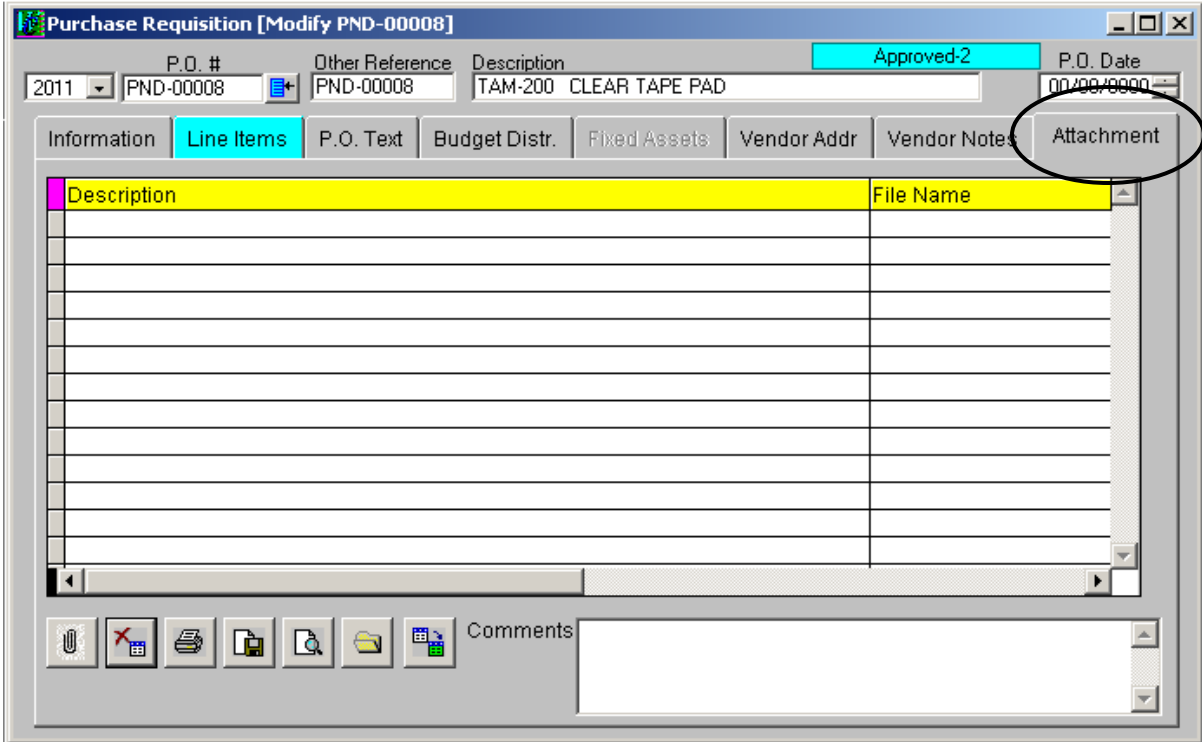


Electronic Attachments for Purchase Orders

The “Attachment” tab is used to electronically attach a document to a purchase order, such as an order form or a teacher’s book list. You may attach files that have been scanned to your computer or a user created file. There is no limit to the file size. The files may be named anything you want and the same file name may be used on multiple purchase orders. You may attach as many files as you need.


Prior to using the “Attachment” tab, set up a folder on your desktop dedicated to purchase order documentation. You may name the folder anything you want, but it should be something that identifies it as containing PO attachments, such as “PO Documents” or “Scanned PO Attachments”.

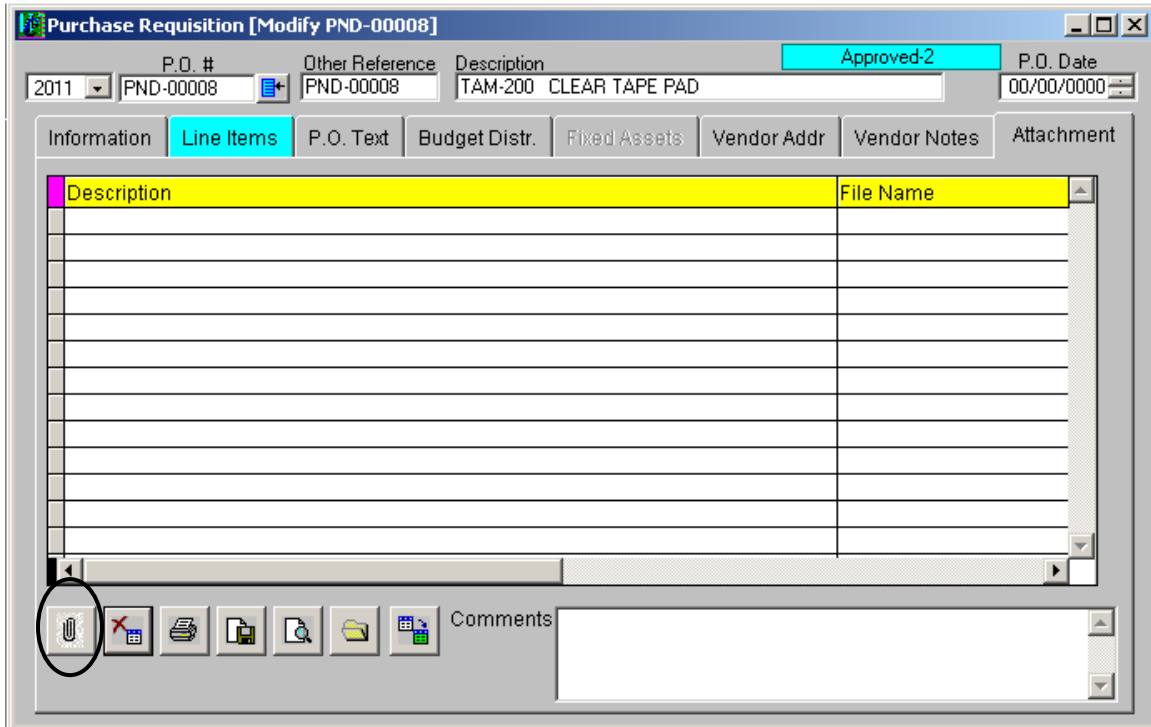
Open the appropriate Purchase Order, click the modify button and then click on the tab that says “Attachment”.



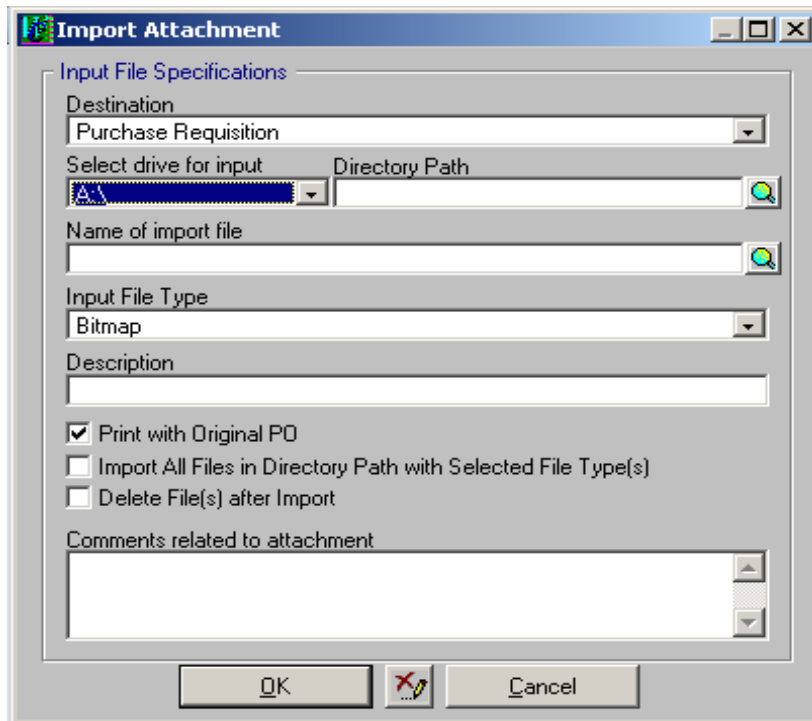
The screenshot displays the 'Purchase Requisition [Modify PND-00008]' window. At the top, there are fields for 'P.O. #', 'Other Reference', 'Description', 'Approved-2', and 'P.O. Date'. Below these are tabs for 'Information', 'Line Items', 'P.O. Text', 'Budget Distr.', 'Fixed Assets', 'Vendor Addr', 'Vendor Notes', and 'Attachment'. The 'Attachment' tab is circled in red. The main area is a table with two columns: 'Description' and 'File Name'. At the bottom, there is a 'Comments' section with a text area and several icons (printer, folder, etc.).

Description	File Name

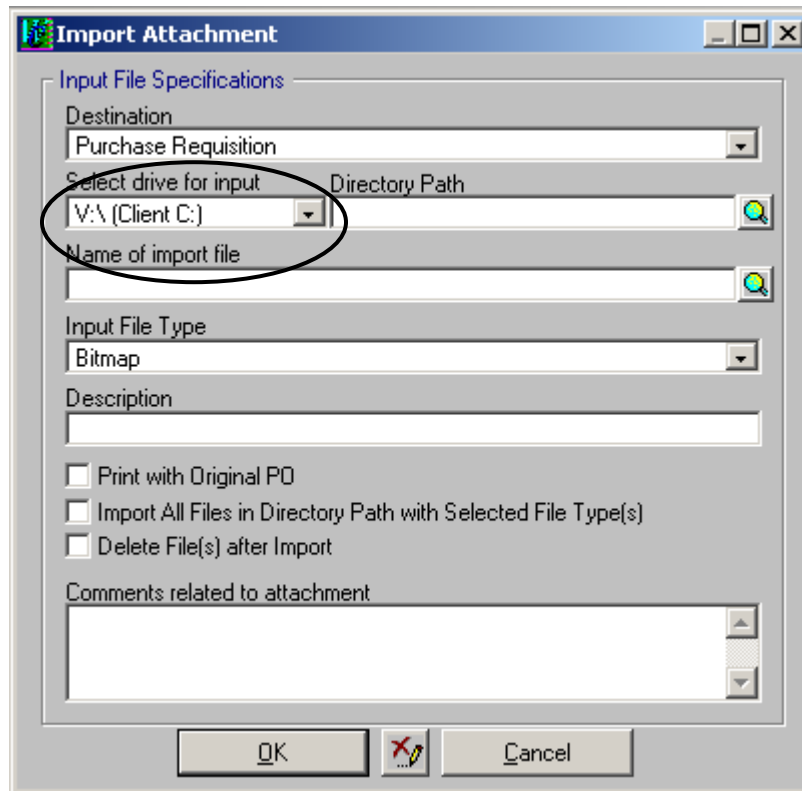
To attach a file, select the paperclip  button.



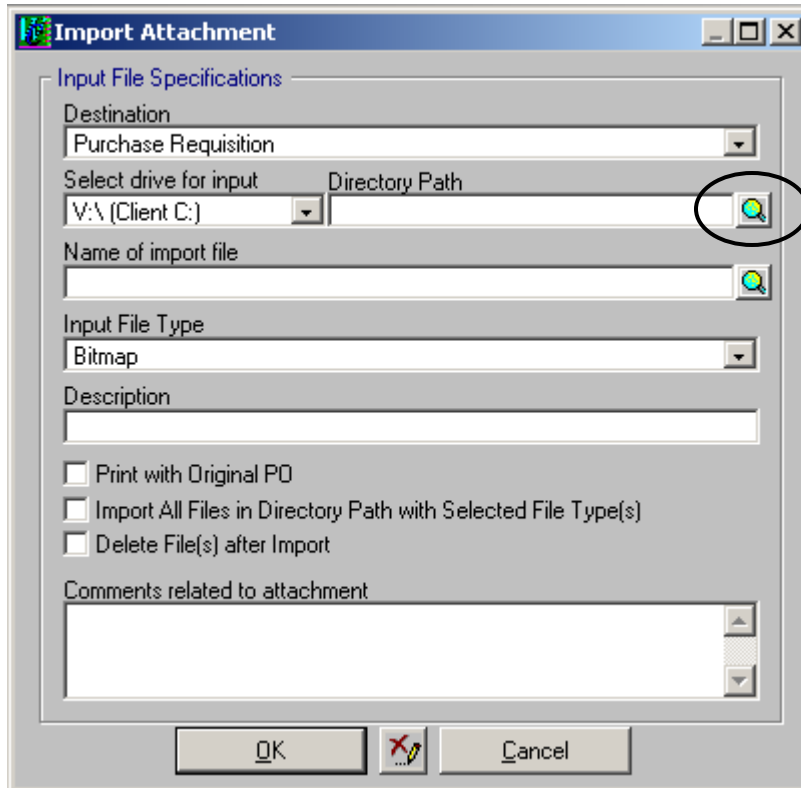
The “Import Attachment” dialog box will appear.



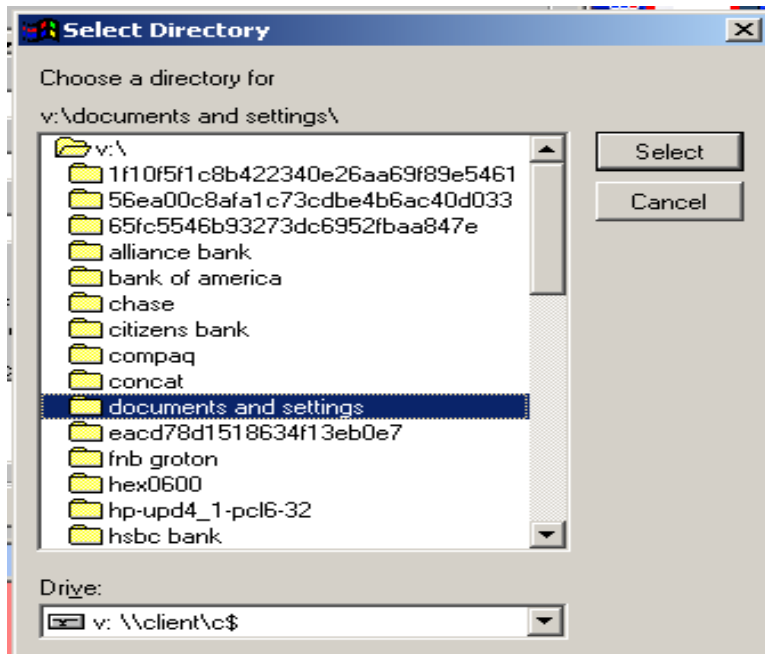
Select the correct drive from the drop down menu.
This will always be **V:\ (Client C:)**, which is your C drive.



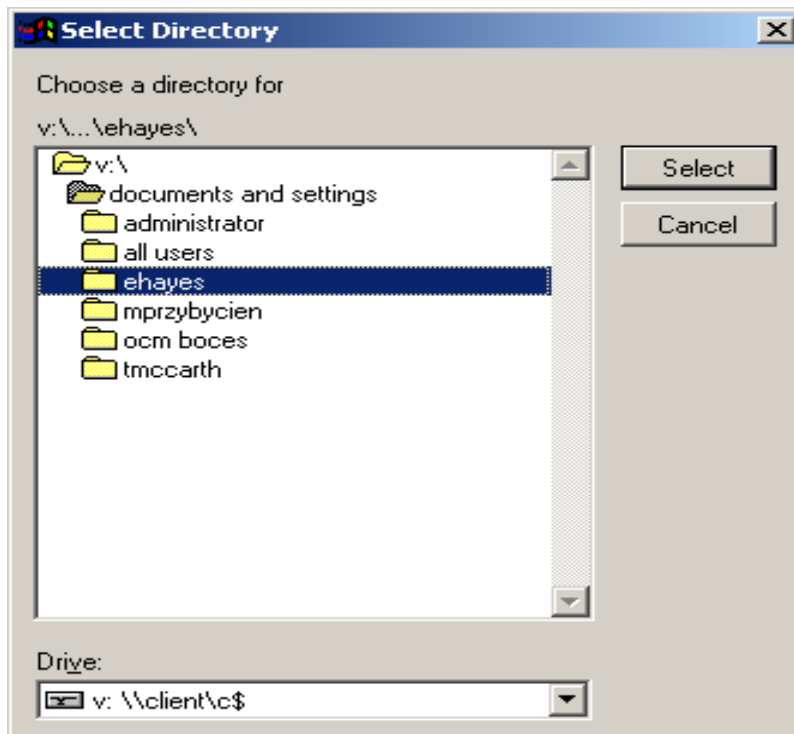
Select the correct directory path using the magnifying glass.



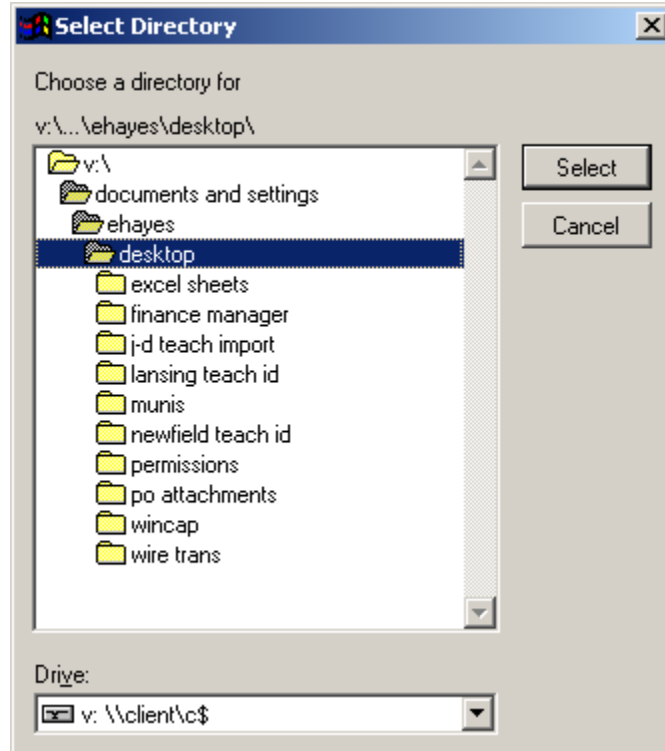
The “Select Directory” dialog box will appear. Select the folder named “documents and settings” by double clicking on the folder.



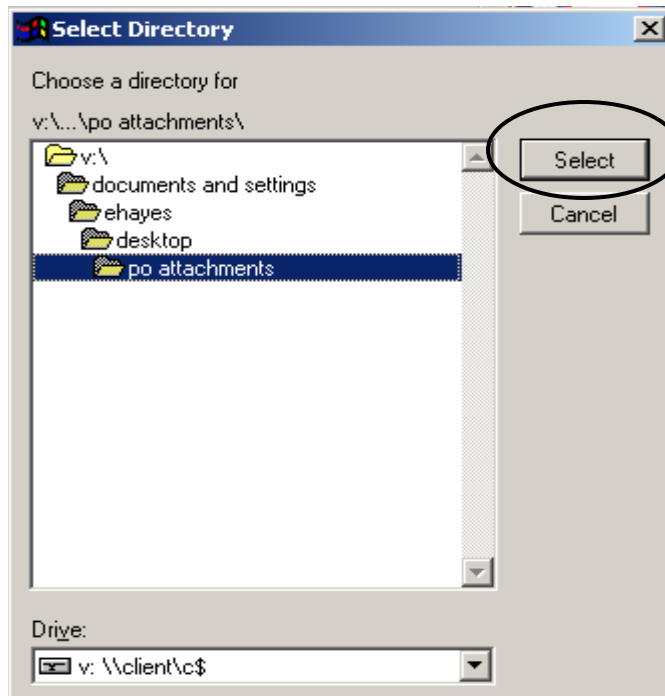
Then select the folder with your first initial and last name by double clicking.



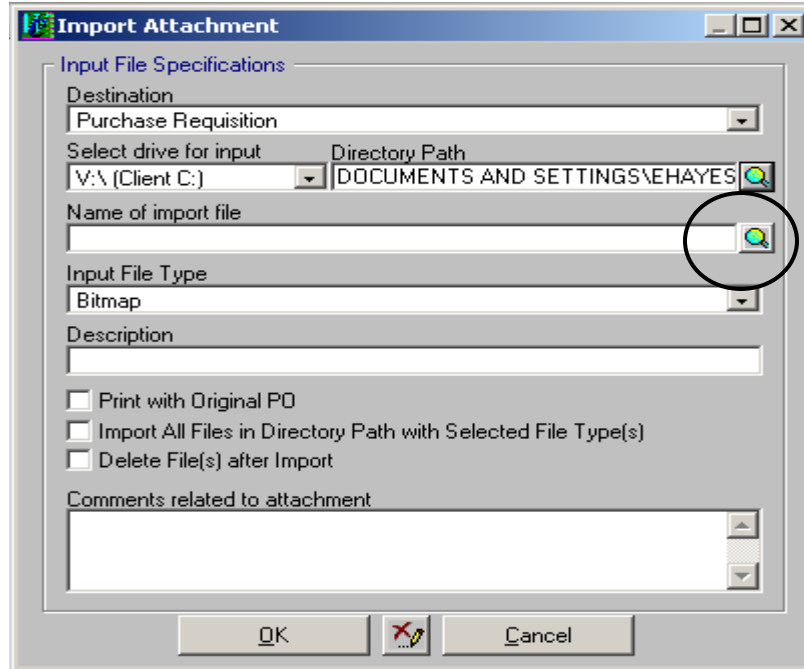
Select the folder “desktop” by double clicking.



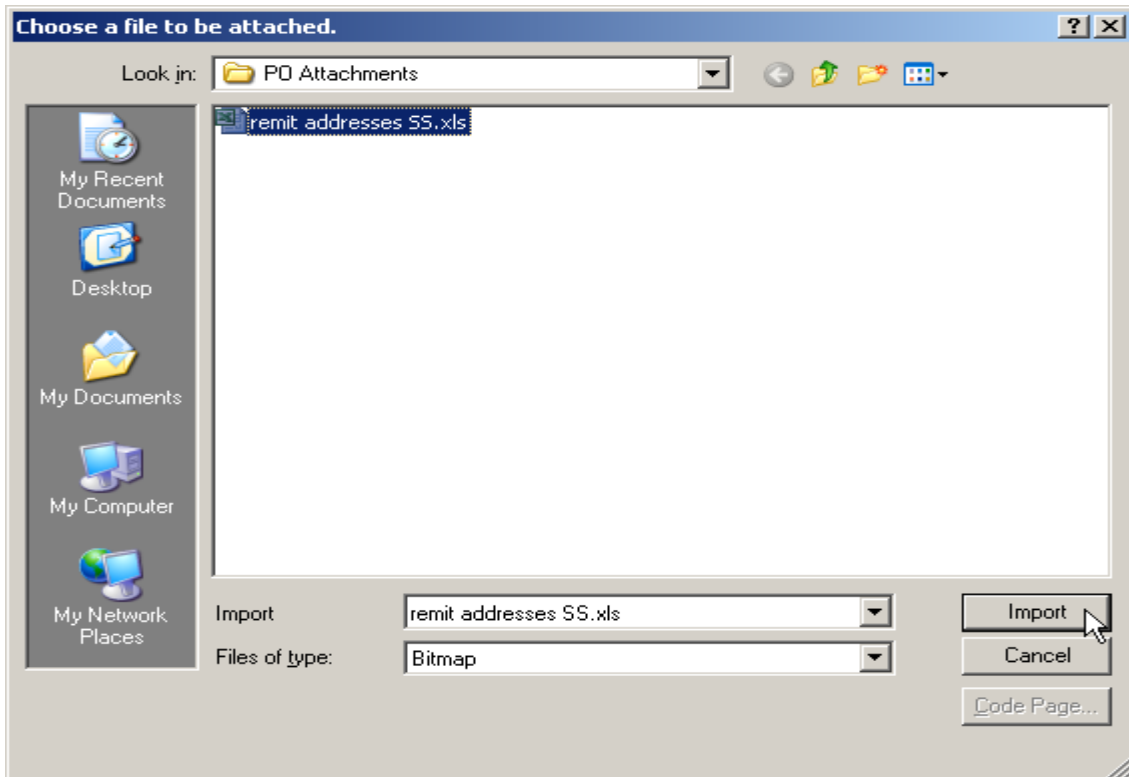
Select the file that you have created for purchase order attachments. For the purposes of the example the folder has been named “po attachments”. Then choose “Select”.



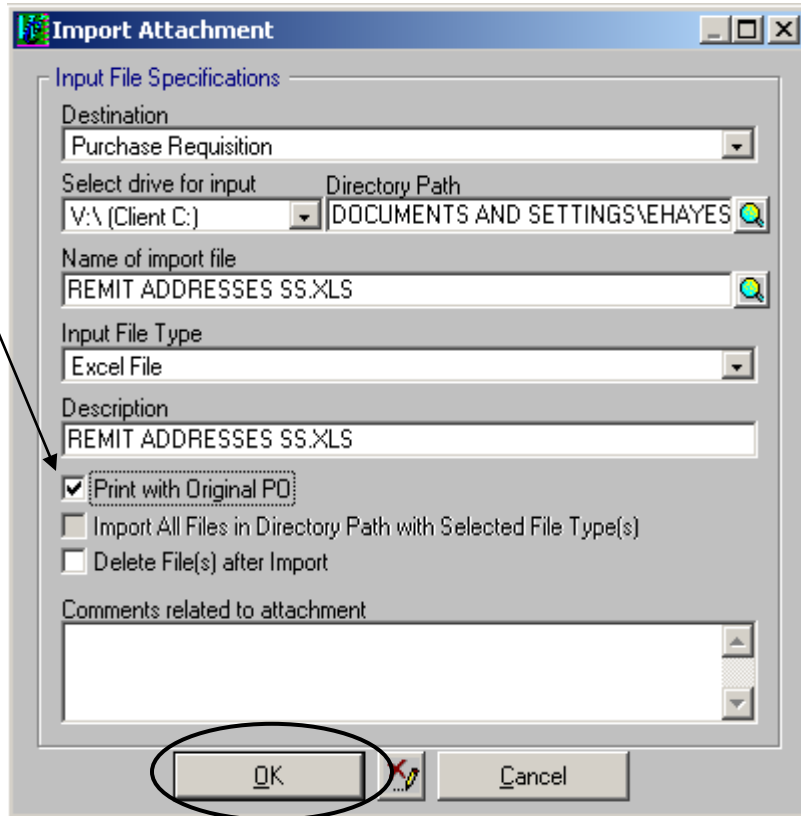
Select the import file name using the magnifying glass.



The following dialog box will appear. Click on the name of the file you wish to attach to the purchase order. Then select "Import".



The final dialog box should appear like the following. Ensure that the box “Print with Original PO” is checked **only** if the attachment needs to be sent to the vendor. If you are attaching a document that is for internal use only leave this box unchecked. Once you have verified that the information is correct, select “OK”.



If the file has been successfully attached the following dialog will appear. Select “OK”.



After the file has been successfully attached the “Description”, “File Name” and “Print” fields will automatically fill in on the grid.


Description	File Name	Print
REMIT ADDRESSES SS.XLS	REMIT ADDRESSES SS.XLS	<input checked="" type="checkbox"/>

Use the icons on the bottom of the form to manage attachments.

To view, print, export, move, delete or enter “Comments” on an attachment first select an attachment from the grid. Then click an icon to perform the action.

 Delete the selected attachment

 Print the selected attachment to the default printer

 Export the selected attachment to a file

 Open the selected attachment in a separate form

 Open a local copy of the selected file

 Move attachment to PO vendor

To print the attachments with the purchase orders, check the box “Print Attachments with PO Copies” on the print screen. The attachment will not show up in the print preview, however they will print.

The screenshot shows the 'Purchase Order Selection' dialog box with the following settings:

- Record selection:** Fiscal Year: 2011; Criteria Name: Shared: Single PO; Open - Not Printed button.
- Document ID:** From: PND-00008; To: (empty); Pending Orders: None; Issued Orders: None; Original Transmit Type: Print.
- Order/Issue Date:** From: 00/00/0000; To: 00/00/0000.
- Search criteria:** Vendor, Requisitioner, Requestor, Department, and Catalog/Bid ID are all set to 'Blank'.
- Print options:** Show Budgetcodes by Line-Item (multiple accounts) on non-originals; Shipping: Lump sum; Discount: Lump sum; Keep Together Item Description; Primary Sort: None; Secondary Sort: None; Item Sort: Catalog Item ID; Copy Type: All sorted by PO; Print Purchasing Agent Name and Title; Print Electronic Signature.
- Show Separate Page with:** PO Notes; PO History; Print Attachments with PO Copies (circled in black).
- Buttons:** Crystal: <default report>, Print Settings, Cancel.