PO Entry: Entering Standard PO - Attachments

Overview

Adding an Attachment to a Standard Purchase Order is optional. An Attachment can be added to better explain a field or provide a note about the order. An Attachment can be added to the PO Header, Lines, Shipments and/or Distributions. Attachments are added after the Purchase Order has been saved. If you save the PO and exit application and then decide that it is necessary to add an Attachment, you can re-query the Purchase Order to add it.

These same steps would be followed regardless of which region is used to add an Attachment. We will begin at the SIU Purchase Orders (SIU Operating Unit) window. We used Purchase Order Summary from the Navigator to retrieve the specific PO being used because we are adding the Attachment after having exited the application.

Note: If you wish to add the Attachment while you are creating the purchase order instead of adding it later, the following regions should be entered and SAVED first:

- Header
- Lines
- Terms and Shipments
- Distributions

- First, select the region of the Purchase Order where the Attachment is to be added.
  - For the explanation that follows, an Attachment is added to the "Lines" region of a purchase order.

Attachment Window

- Once your cursor is correctly placed, open the Attachments window by clicking on the **View menu** and selecting **Attachments.**
  - Remember - you may also use the paperclip icon on the Toolbar.

- The **Attachments - 1** window opens.

- The Attachments feature is used to add text or link files to the Purchase Order.

- For this demonstration, text is added.

Main Region

- The first data entry field, **Category**, defines the purpose of an Attachment.

- The cursor rests in the *Seq* field; press **Tab** once to place the cursor in the Category field.

- **Click** the Category LOV indicator to activate it.

- An intermediate Categories window opens, warning you that the list may be lengthy.

- You can choose to enter a partial value to limit the list or "%" to see all values.

- **Enter** the wildcard character **"%"** in the Find field. The Find button is now enabled; click it to continue.

- A predefined list of values for Categories is displayed; use the scroll bar to view all values.

- At the bottom of the list is the **To Supplier** option.
  - By choosing the To Supplier category, the information in the Attachment is printed in the description section of the purchase order and is visible to the vendor.

- **Click** "To Supplier" and then click OK.

- The cursor automatically advances to the **Title** field. This field, as well as the **Description** field, is free form entry and entry is optional.
  - These fields are used to enter text that will help identify the Attachment in the future (e.g., PO xxxxx, etc.).

- After entering a Description, press Tab or if you skipped entering a Description and click the **Source** Tab to display the **Data Type** field.

- The **Data Type** field contains an LOV. To activate the LOV for this field, click on it.

- The **Datatypes** window opens.

- Four options are available:
    - **File** - allows you to attach content stored in a desktop file, text or images.
    - **Long Text** - allows you to enter text containing 2000 characters or more.
    - **Short Text** - allows you to enter text containing less than 2000 characters.
    - **Web Page** - allows you to reference an URL from a web page, which you can view with your web browser.

- Select the desired option and then click OK.

Body of the Attachment

- Upon completion of the Data Type field, the cursor automatically advances to the body of the Attachment.
    - Notice the background color has changed to yellow.
    - This area is used to enter the details or additional specifications such as color, size, etc., to further describe the Item being purchased.

- **Enter** desired text, or if you chose **File** or **Web Page**, attach the file or enter the URL.

- This Attachment is complete; **SAVE** your work by clicking the Save icon on the Toolbar.

- Check the Status Bar at the bottom of the window to verify that the added attachment has saved properly.

- If necessary, use the window control buttons (maximize-minimize) to adjust the window so you can view the entire Status Bar.

- Exit the Attachments window and return to the SIU Purchase Orders window.

Verifying Attachment was Added

- When you return to the SIU Purchase Orders window, you can check to see if the Attachment was added.

Reminder: In our demonstration, we added the Attachment to the Lines region.

- In the Lines Region, click in the Num field for the Line you added the Attachment to.

- The Paperclip icon on the Toolbar should look like it has a piece of paper attached; this indicates the selected PO Line has an Attachment.

- Click on the Paperclip icon to view the Attachment. After verifying the Attachment is correct, close the Attachment and either approve the purchase order or exit the application.

- Instructions on how to approve the purchase order are provided in the next learning cycle.