



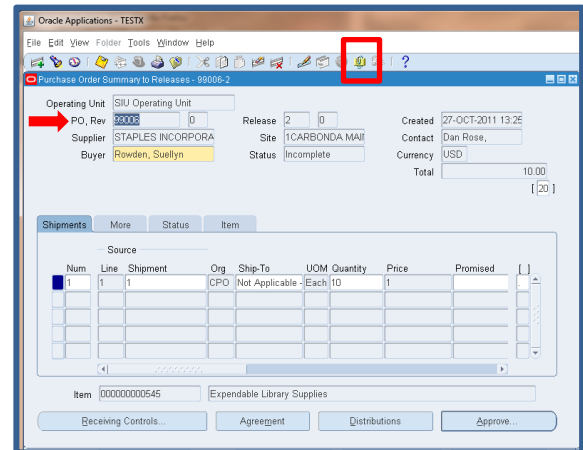
SIU Department Buyer – Attachments

There are some minor changes to the Attachments functionality; they are detailed below. As you may recall, the

toolbar icon  is enabled when the attachments feature is available. If it appears to have a piece of paper in it  that means there is an attachment for the region where your cursor resides, e.g., Header or Shipments region. You can add as many Attachments as necessary to a region.

Viewing

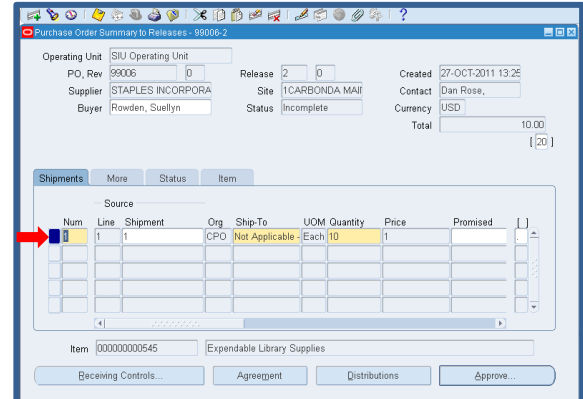
- In the screenshot on the right, our cursor is in the PO, Rev field of the Header region. This Release has an Attachment to the Header, as indicated by the paperclip icon that appears to hold a piece of paper.
- Click the toolbar icon or choose **Attachments...** from the **View** menu to view the existing attachment – we won't do that here.



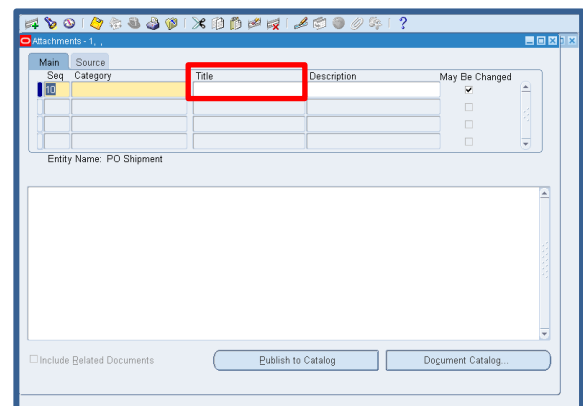
Note: If there is more than one Attachment, in the **Attachments** window, select the attachment you want to view. If the attachment does not automatically display in the document block, select the **Open Document** button to view the document in a browser.

Adding an Attachment

- We'll place our cursor in the Shipments region in the Num field and click the Attachment icon; notice the icon is now empty.



- The Attachments window opens.
- New in R12:** A new field has been added, **Title**. This is where the Description field used to be.
 - The **Description** field has been moved to the right of the Title field.
- The **Data Type** field is no longer in the Main tabbed region.
- The **May Be Changed** check box is checked by default; if checked, it allows changes to the attachment.



- To begin the process, you will still tab to, or click in the Category field; an LOV appears.
 - The **Category** defines the purpose of an attachment and controls which forms or pages can access it.
- Type "To" in the Category field and press Tab.
- The Categories window appears.
- Make your selection; click OK.
- Cursor advances to the Title field; this is an optional field, you can add a Title for your document, if desired.
- Press Tab to advance to the Description field.
 - Recall, the Description field is a free form field – SIU's business practice is to enter the PO # and the Release # - these act as identifiers of the Attachment to whomever you selected from the Categories window.
 - In our example we entered 99006-2 and pressed Tab.

- When we pressed Tab, the **Source** tabbed region opened and displayed the **Data Type** field that used to be on the Main tabbed region.
- It still has an LOV; click it.
- The **Datatypes** window opens.
- For Attachments to Payables, you should always select **Short Text**.
- Make your selection and click OK.

- As before, that activates the "body" of the Attachment. The yellow background indicates the field is required. This is where you will type your information for the Attachment.
- Remember, Accounts Payable requires an Inv #, Date and a brief description. The description must be brief because it prints on the check. This is an SIU business practice.
- If the Inv # and Date are unknown, enter details such as the Item, Quantity, UOM, Description and Unit Cost of the order. If necessary, contact your Accounts Payable Department for instructions.
- Save your work; check Status bar for confirmation
- Close all forms and return to the Navigator.