

Scheduled Releases: Attachments

Overview

- As a Department Buyer, you can **view** all attachments connected to a Purchase Order.
- Department Buyers can **add** an Attachment to the Shipment Lines of a Scheduled Release.
- Attachments must be added before forwarding the document for approval.
- After completing this document, you will know how to identify an existing attachment on a document and how to add an attachment.

Adding Attachments

- To begin, retrieve the PPO that you are adding the Attachment to through Purchase Order Summary.
- From the Navigator window, double-click **Purchase Order Summary**.
- The **Find Purchase Orders** window opens with the cursor in the **Number** field.
- Type the Planned Purchase Order number into the Number field.
 - Or, use LOV indicator to populate the field.
- When working with an existing Release for a PPO, check the **View Releases** checkbox.
- Execute the search by clicking the **Find (J)** button at the bottom of the window or pressing **Enter** on the keyboard.
- The **Purchase Order Headers** window displays the PPO and the Releases to date.
- Select the Release you need by clicking anywhere on the row and then, click the **Open** button.
 - Or, click the **Current Record Indicator**.
- The **Purchase Order Summary to Releases** window opens.
 - Notice the Purchase Order “Number” and Release “Number”, both appear in the **Title Bar** of the window.
 - The Status is “Incomplete”; but, this Release has been saved because the PO Summary window was used to open the record.
 - It is **important** that the Header information has been saved prior to adding an Attachment.
- You must be aware of where your cursor is located to correctly add an attachment.
 - To add an attachment to the header, your cursor must be in one of the header fields.
 - To add an attachment to a shipment line, your cursor must be in one of the fields in the specific Shipment line.
- If the Attachments icon (paperclip) on the Toolbar already has a piece of paper in it, then someone has already placed an attachment on the PPO.
 - To open the attachment, just click the Attachments icon or select the View menu/ Attachments.

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 to Shipments

- Click anywhere on the first line of the **Shipments** tabbed region. **DO NOT** use the current record indicator.
- View the “Paperclip” icon on the Toolbar. It should be enabled and have no paper in it; that means you can add an Attachment.
 - Remember, the “Paperclip” icon must be enabled to add an Attachment.
- Click on the Attachments (Paperclip) icon on the Toolbar.

- The **Attachments - 1** window opens.
 - You can add as many attachments as you need to this window. If there were existing attachments for this shipment, you would see them when the window opened.
- Tab to the **Category** field.
 - The Category defines the purpose of an attachment and controls which forms or pages can access it.
- Use the LOV indicator to populate the field from a picklist. For example, enter "To" in the Category field and press Tab.
- The **Categories** window opens; it contains a list of our choices for Attachments.
- Select the appropriate "Category" (e.g., To Payables) and press the **Enter** key.
- The Category field populates with the selection and the cursor advances to the Title field; this is an optional field. You can add a Title for your document, if desired.
- Tab to the **Description** field.
 - **Note:** The **May Be Changed** check box is checked by default; if checked, it allows changes to the attachment.
- 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.
- Enter the PO number and Release number in to the Description field and press "Tab".
- The **Source** tabbed region will open and display the **Data Type** field.
- Click on the LOV indicator for the Data Type field; the **Datatypes** window opens.
- Select a Data Type and click the OK button.
 - For Attachments to Payables, you should always select **Short Text**.
- This activates the "body" of the Attachment. Notice that the background for the body of Attachment section becomes yellow.
 - Reminder: Fields with yellow backgrounds are required.
- Before typing the information for the attachment, remember:
 - Accounts Payable requires an **INV#, Date** and a brief **Description**.
 - The "Description" has to be brief, because it prints on the check.
 - This is an SIU business practice.
- Type in the Invoice Number, a Date, and a brief description.
 - If the Invoice Number and Date are unknown, enter a brief description including such details as the Item, Quantity, UOM, Description and Unit Cost of the order. If necessary, contact your Accounts Payable Department for instructions.
- **SAVE** the Attachment; verify that the transactions saved by the Message Line on the Taskbar.

Sending a Second Attachment (Optional)

- If you would like to send this information to another group, repeat the steps.
- To save time **copy** the text in the "body" of the Attachment and then, create a second record and paste the copied text into the body of the Attachment for the second record.
 - To copy the information in the body:
 - Highlight the text and press **Ctrl + c** on the keyboard;
 - Or, use the Oracle **"Copy"** function.
- To create a second record, in the **Main** tabbed region at the top of the Attachments window, click in the second row, "Seq" (sequence) field.
- Repeat the same steps previously performed for the first line.
 - Tab to the Category field and type "to"; press "Tab".
 - Select a 'Category' (e.g. To Approver) and press "Enter".

- The same data will be entered for the **Description** and **Data Type** fields.
 - Type the text and press Tab to advance the cursor.
 - Or, use the **Edit** menu and the **Duplicate Field Above** function.
DO NOT use the copy and paste function, if you previously copied the text from the body of the Attachment.
- Click in the body of the Attachment and press **Ctrl + v** to paste the text into the field.
- Two groups now have the information they need.
- Click the “SAVE” icon to save this entry too.

Exit Purchase Order Summary to Releases Window

- Click the **Close Form** icon, until you return to the Navigator window.
- Congratulations, you have completed the steps for adding an attachment on a Shipment line of a Scheduled Release.

End of Document