

Entering Line Attachments to Detail Line

Overview

Text Attachments may be added to a document header or its detail lines to provide additional information about the document.

Document lines may require more descriptive text than what is available with the fields on the order detail line. If you have information that is specific to a detail line for any NIS Module, and it does not fit on the system provided line, you may add that information by attaching it via the Text, OLE, URL and/or File attachment process.

Text Attachments

-  Only the first Text Attachment for each line will print on a procurement document. The system allows you to have multiple attachments.
-  The system has been designed to carry text attachments over to new documents that are generated from an original document. An attachment to a detail line on a Purchasing Document will appear on the corresponding detail line of any document generated (example: Quotation Request, Purchase Order, or Contract) or copied.

Object, Linking and Embedding (OLE) Attachments

-  The embedded file can be in MS Word, MS Excel, or PDF (Adobe Acrobat®). An OLE attachment is converted into and stored as a stg file.
-  The OLE attachments do not print on any document. If the information is to be included with a document, it must be sent electronically or printed independently.
-  It is recommended that a text line or a text attachment be used to indicate that an OLE document exists.
-  OLE attachments automatically copy to documents that are generated from the original document.
-  OLE attachments can be modified once they are attached to the document in NIS. These modifications are not tracked by ID; however, track changes can be used. If an attachment is modified, the modification is visible only on the attachment with which the end user is working. Attachments to previous documents are not modified.

File Attachments

-  The embedded file can be in MS Word, MS Excel, or PDF (Adobe Acrobat®).
-  The File attachments do not print on any procurement documents. If the information is to be included with a document, it must be sent electronically or printed independently.

-  It is recommended that a text line or a text attachment be used to indicate that a File document exists.
-  File attachments automatically copy to documents that are generated from the original document.
 -  File attachments can not be modified once they are attached to the document in NIS and can be opened in Read Only format. The File Attachment is for viewing purpose only. If changes are made to the document, including typing text, pasting graphics, etc., they will not be saved.

URL Attachments (Web Page)

-  URL media object function attaches a web page “.html” to a document
-  It is recommended that a text line or a text attachment be used to indicate that an URL exists.
-  The URL attachments do not print on any documents. If the information is to be included with a document, it must be sent electronically or printed independently.
-  URL attachments automatically copy to documents that are generated from the original document.

This work instruction shows how to [Enter Line Attachments to Detail Line](#)

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

Navigation

Click Roles, Procurement or Inventory.
(Citrix users – right click on the menu, choose View by Role, choose Procurement.)

Attachments can be added to any NIS Module – including Address Book, HR, Payroll, Procurement, Inventory, General Accounting, A/P and A/R Navigate to the appropriate document menu. The examples below show attachments added via the Procurement Module.

Steps

Enter Line Attachments: Text (to Detail Line)

Start this instruction from Order Detail window.

 To get to the Order Detail window:

Enter the **order number** in the Order Number field, and the **order type** if not defaulted.

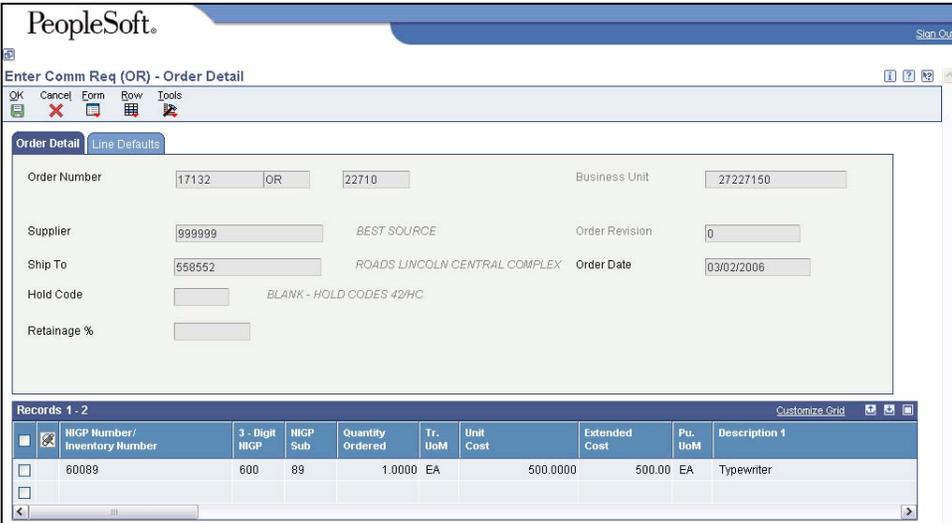
Click **Find**.

Choose the Order Number if not defaulted.

Click **Select**. The Order Header window appears.

Click **OK**. The Order Detail window appears.

 This example uses the Enter Comm Req (OR) – Order Detail window.

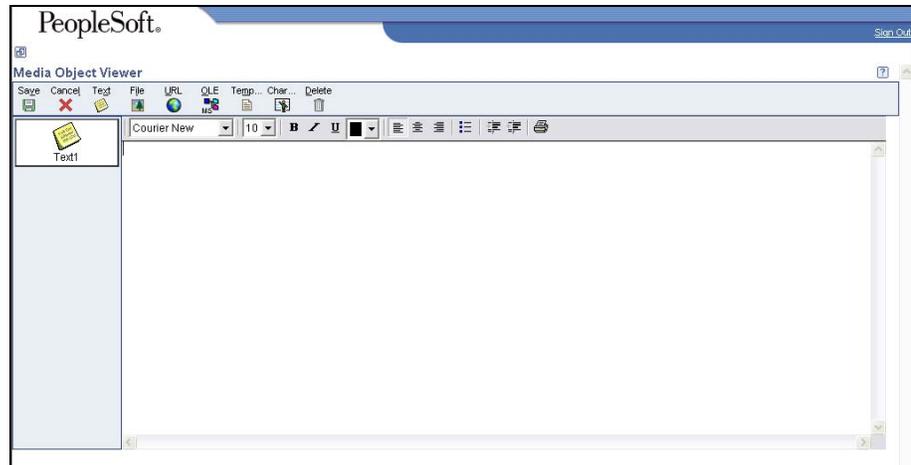


NIGP Number/ Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
60089	600	89	1.0000	EA	500.0000	500.00	EA	Typewriter

1. Choose desired grid row.
2. Click **Row, Line Attachments**. The Media Object Viewer window appears.



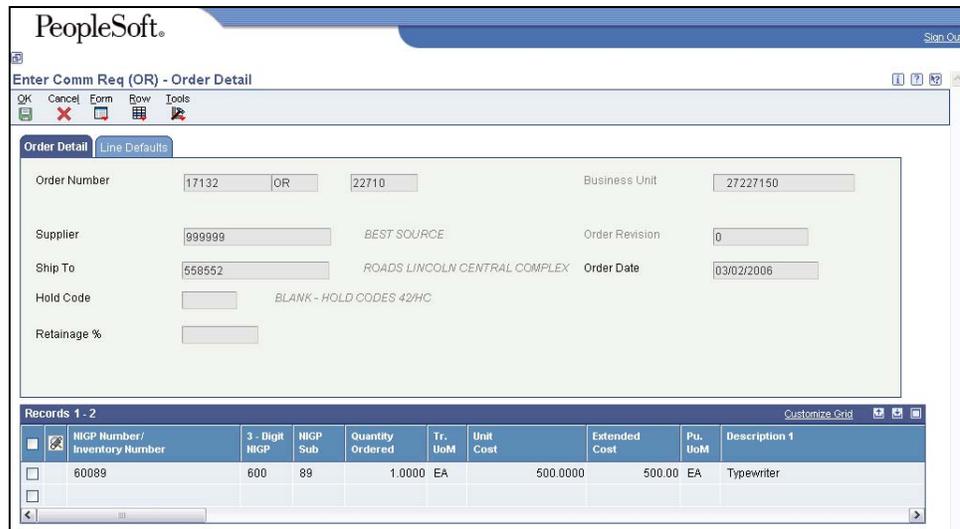
3. Click **Text**. The Text icon appears in the space on the left side of the window.



4. Click in the **blank area** of the window.
5. Enter the free form text desired. (Or cut and paste from another document.)
-  To name the attachment, click on the word "text" on the Text icon that appears in the space on the left side of the window.
6. Click **Save**. The Order Detail window appears.
7. Continue to work with the purchasing document as needed.
-  Text Attachments do not spell check.

Enter Line Attachments: Object Linking and Embedding, OLE (To Detail Line)

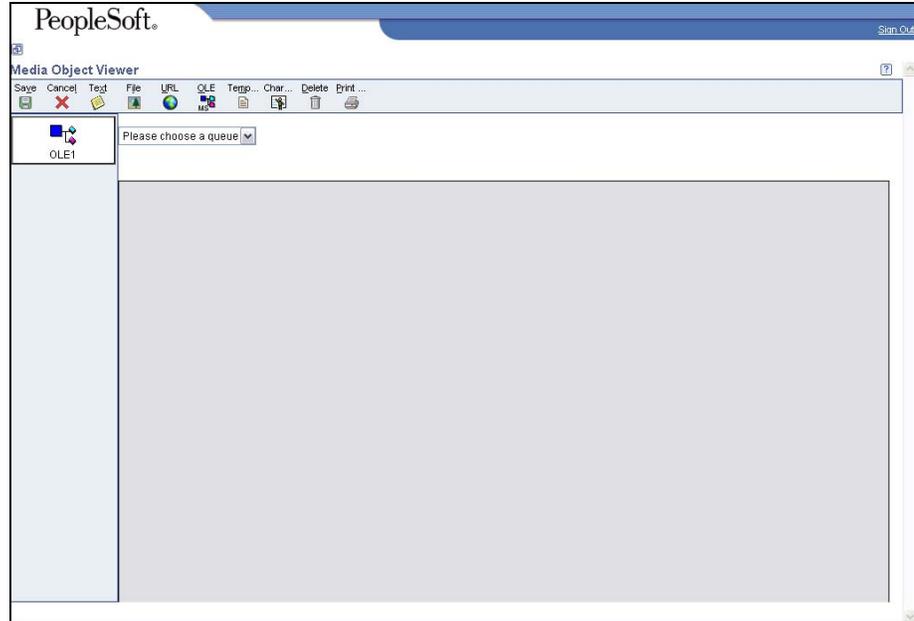
- ✎ To get to the Order Detail window:
 - Enter the **order number** in the Order Number field, and the **order type** if not defaulted.
 - Click **Find**.
 - Choose the Order Number if not defaulted.
 - Click **Select**. The Order Header window appears.
 - Click **OK**. The Order Detail window appears.
- ✎ This example uses the Enter Comm Req OR - Order Detail window to create a Line attachment.



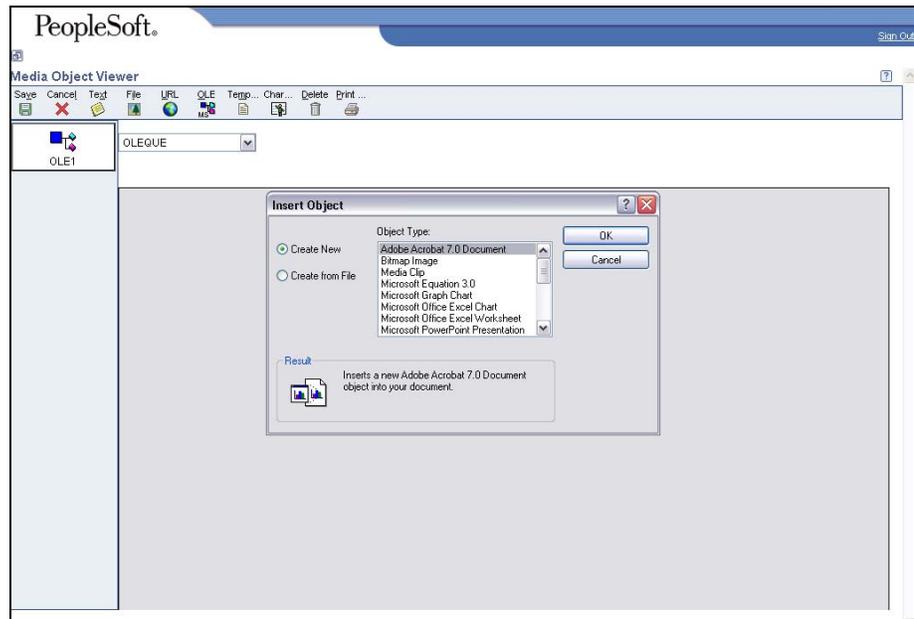
1. Choose desired grid row.
2. Click **Row, Line Attachments**. The Media Object Viewer window appears.



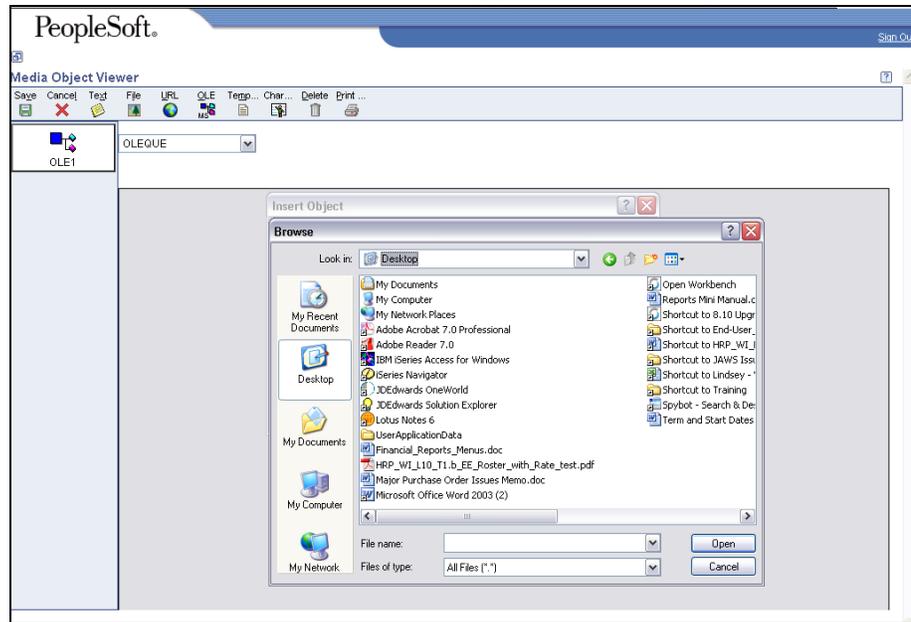
3. Click **OLE**.



4. Click on the down arrow to the right of the box that reads, "Please choose a queue."
5. Choose "OLEQUE." An Insert Object window appears.



6. Choose **Create from File**.
7. Click **Browse**.



8. Browse for the file that you want to attach. This can be a Word (.doc), Excel (.xls), or PDF (.pdf) file.
9. Choose the file.
10. Click **Open**.
11. Click **OK**.
- ✎ Move the cursor/arrow to the OLE document. Double click the left mouse button to view the document.
- ✎ If another attachment is already associated with the detail line, you can select it and then return to the OLE attachment to view and revise it.
12. Click **Save**. The Order Detail window appears.
13. Continue to work with the purchasing document as needed.

Enter Attachments: File (To Detail Lines)

 To get to the Order Detail window:

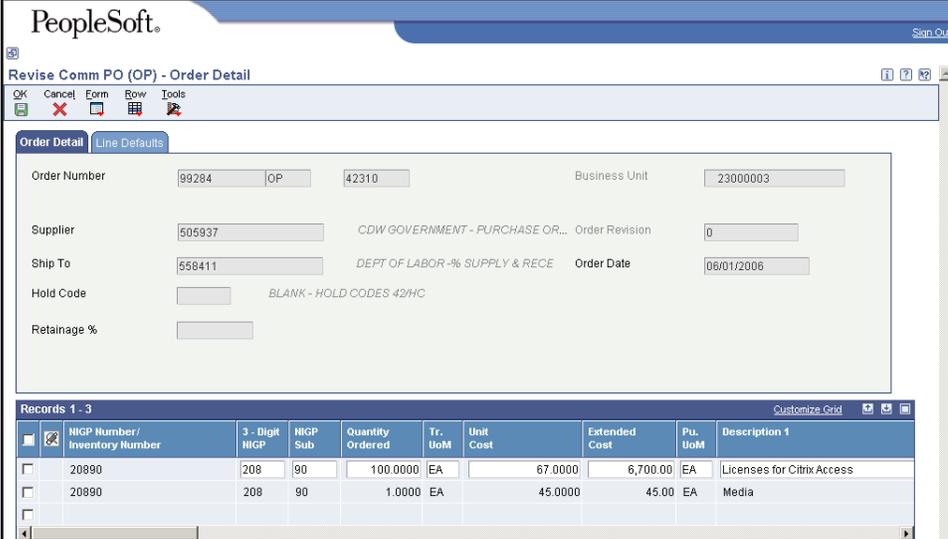
Enter the **order number** in the Order Number field, and the **order type** if not defaulted.

Click **Find**.

Choose the Order Number if not defaulted.

Click **Select**. The Order Header window appears.

Click **OK**. The Order Detail window appears.



Records	INIGP Number / Inventory Number	3 - Digit INIGP	INIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
1	20890	208	90	100.0000	EA	67.0000	6,700.00	EA	Licenses for Citrix Access
2	20890	208	90	1.0000	EA	45.0000	45.00	EA	Media
3									

1. Choose the Row you wish to add the attachment, Click **Row, Line Attachments**. The Media Object Viewer window appears.

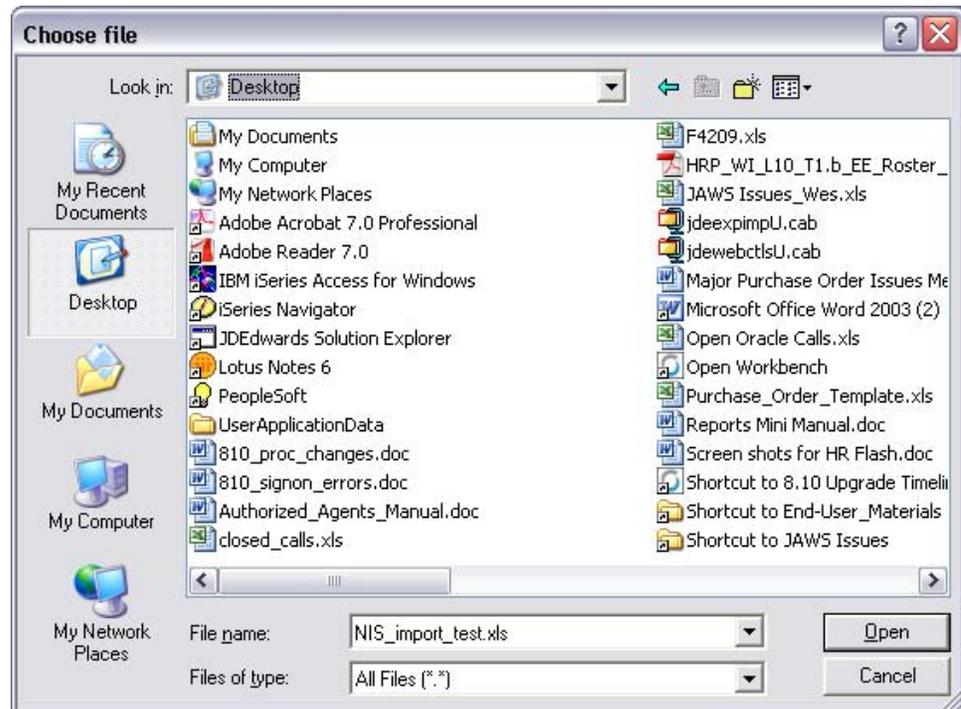


2. Click **File**. The Media Object View Add – File window appears.

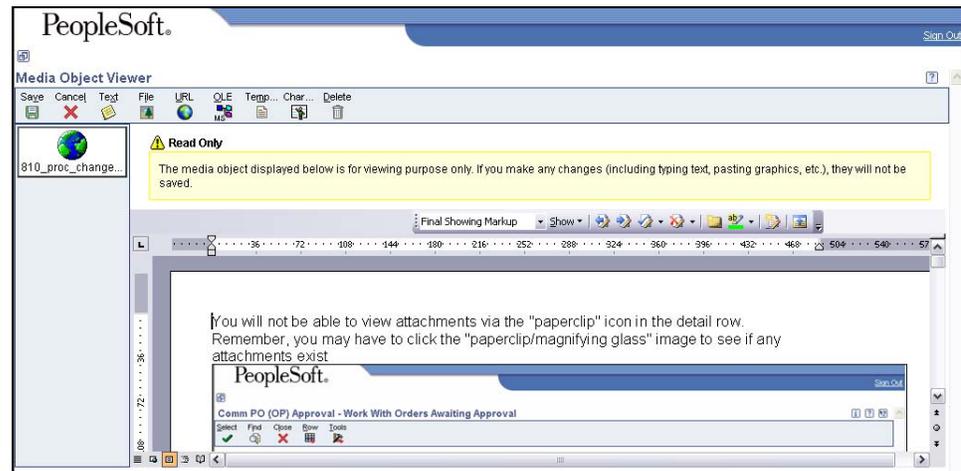


3. Choose **Select Local File**.

- Click **Browse**. The Choose file window appears.



- Browse for the file that you want to attach. This can be a Word (.doc), Excel (.xls), or PDF (.pdf) file.
- Choose the file.
- Click **Open**.
- Click **Add**. The file attached appears in the viewer window.



- Click **Save**. You will return to the Order Detail Screen.
- Continue to work with the purchasing document as needed.

Enter Attachments: URL (To Detail Lines)



To get to the Order Header window:

Enter the **order number** in the Order Number field, and the **order type** if not defaulted.

Click **Find**.

Choose the Order Number if not defaulted.

Click **Select**. The Order Header window appears.

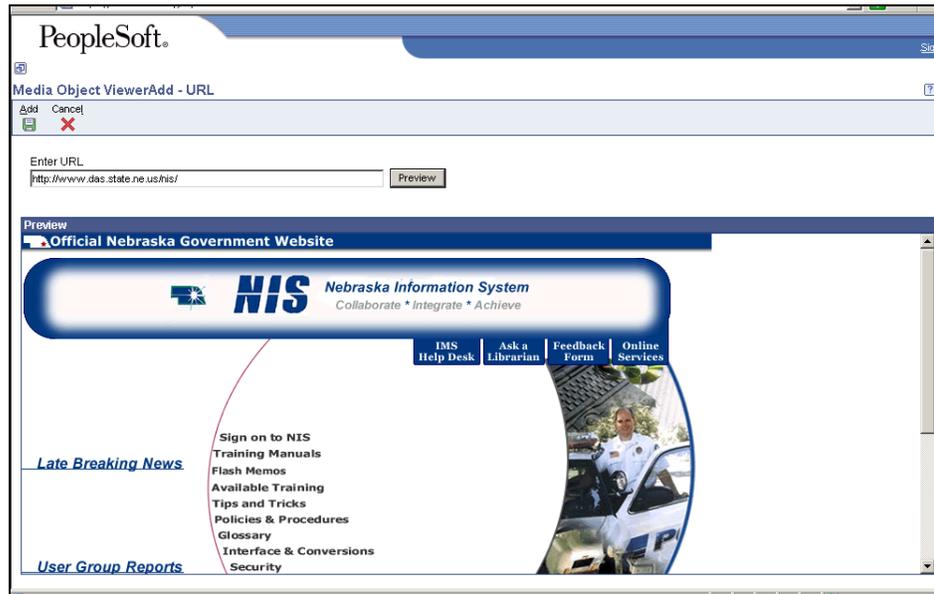
Click **OK**. The Order Detail window appears.

INIGP Number / Inventory Number	3 - Digit INIGP	INIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
20890	208	90	100.0000	EA	67.0000	6,700.00	EA	Licenses for Citrix Access
20890	208	90	1.0000	EA	45.0000	45.00	EA	Media

1. Choose the Row you wish to add the attachment, Click **Row, Line Attachments**. The Media Object Viewer window appears.

2. Click **URL**. The Media Object View Add – File window appears.

3. Enter the URL in the box.
4. Click **Preview**. The url appears below.



5. Click **Add**.
6. Click **Save**.