

Creating Document Attachment
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SYSTEM POLICIES

The tasks in this documentation provide end users with the tools to enter data and collect data in system. 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.

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Creating Document Attachment

Creating Document Attachment Overview

To provide additional information about a document, attachments can be included on purchasing documents and bid responses.

Document header attachments are made when Information is specific to an entire purchasing document (Purchase Requisition, Quotation Request, Contract, or Purchase Order).

Detail line attachments are made when a line of detail on a purchasing document requires more descriptive information about the item being purchased than is contained within the detail line.

Different types of attachments are used based upon the type of information required:

- o Text
- o Object, Linking and Embedding (OLE)
- o File
- o URL (Web Page)

Text Attachments

- o Only the first Text Attachment will print on a procurement document. The system allows you to have multiple attachments.
- o Text attachments on originating documents are included on generated or copied documents.

Object, Linking and Embedding (OLE) Attachments

- o An 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.
- o The OLE 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.
- o OLE attachments automatically copy to documents that are generated from the original document. There is one exception, Purchase Orders do not carry the RFP or the ITB documents from a Contract.
- o OLE attachments can be modified. These modifications are not tracked by User ID; however, track changes can be used. Revisions to OLE Attachments only affect the current document.

File Attachments

- o The embedded file can be in MS Word, MS Excel, or PDF (Adobe Acrobat®).
- o 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.
- o File attachments automatically copy to documents that are generated from the original document.
- o File attachments can be opened in Read Only format and cannot be modified once they are attached to the document in NIS. The File Attachment is for viewing purpose only. Any changes to File Attachments, including text, pasting graphics, will not be saved.

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URL Attachments (Web Page)

- o URL media object function attaches a link to a web page
- o URL attachments automatically copy to documents that are generated from the original document.

Creating Document Attachment Lesson

Procedure

The screenshot shows the 'Work with Requisition - Order Header' form in Oracle JD Edwards EnterpriseOne. The form is divided into several sections: 'Order Header' with fields for Order Number, OP, 56650, and Business Unit; 'Address Numbers' with fields for Supplier, Ship To, Buyer, and Send Invoice To; 'Dates' with fields for Entered Date, Requested, Prom Del Date, and Cancel Date; 'Tax' with fields for Tax Expl Code, Tax Rate/Area, Certificate, Tax ID, and Person/Corp. ID; 'Hold Code' with fields for Hold Code, Approval Code, Retainage %, Ordered By, and Order Taken By; and a 'Messages' section at the bottom. The browser window title is 'PEREZ, JULIE J [JPV900] Sign Out'.

Step	Action
1.	<p>Attachments to a record can be made as information specific to an entire record or as information specific to detail lines within a record.</p> <p>To illustrate the Attachment functionality, a procurement document is used.</p> <p>Attachments to the entire record are made through the Form exit and attachments to a detail line on the record are made through the Row exit.</p>

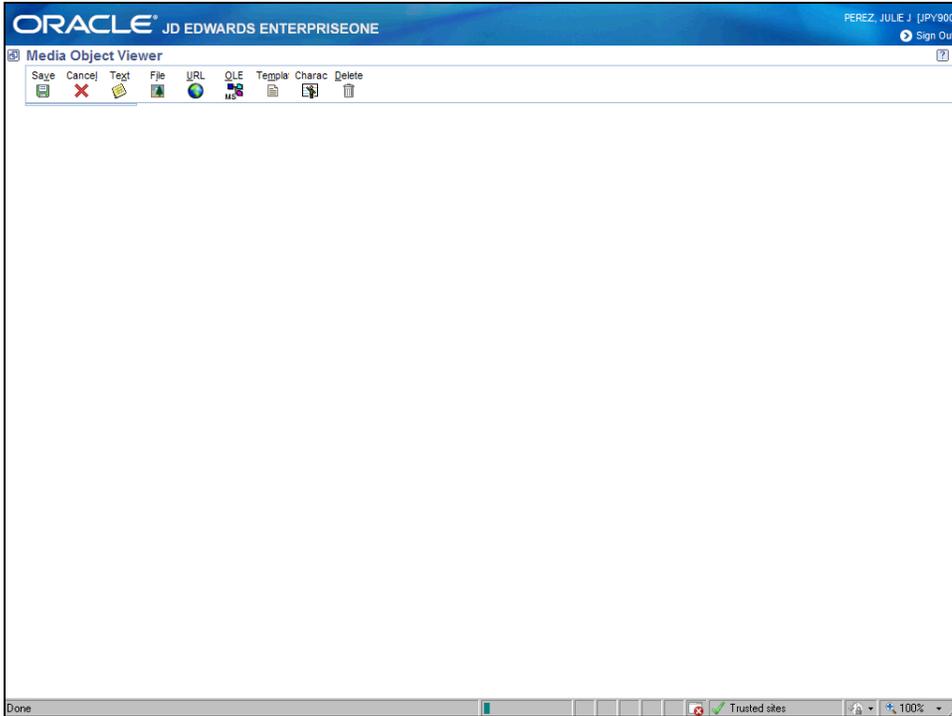
The screenshot displays the 'Work with Requisition - Order Header' window in Oracle JD Edwards EnterpriseOne. The window title bar includes the user name 'PEREZ, JULIE J [JPY900]' and a 'Sign Out' button. The main content area is divided into several sections:

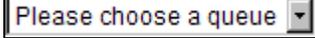
- Order Header:** Contains fields for Order Number (300188), OP (56650), and Business Unit (65025009).
- Address Numbers:** Includes Supplier (500020), Ship To (678925), Buyer (576663), and Send Invoice To (678943).
- Dates:** Includes Entered Date (02/05/2010), Requested (02/05/2010), Prom Del Date (02/05/2010), and Cancel Date.
- Other Fields:** Includes Tax Expl Code, Tax Rate/Area, Certificate, Tax ID (561848578), Person/Corp. ID, Payment Terms (Net 30 Days from Invoice Date), Hold Code (BLANK - HOLD CODES 42/HC), Approval Code (100378), Retainage %, Ordered By (NISJPerez), and Order Taken By.
- Messages:** A section at the bottom for displaying messages.

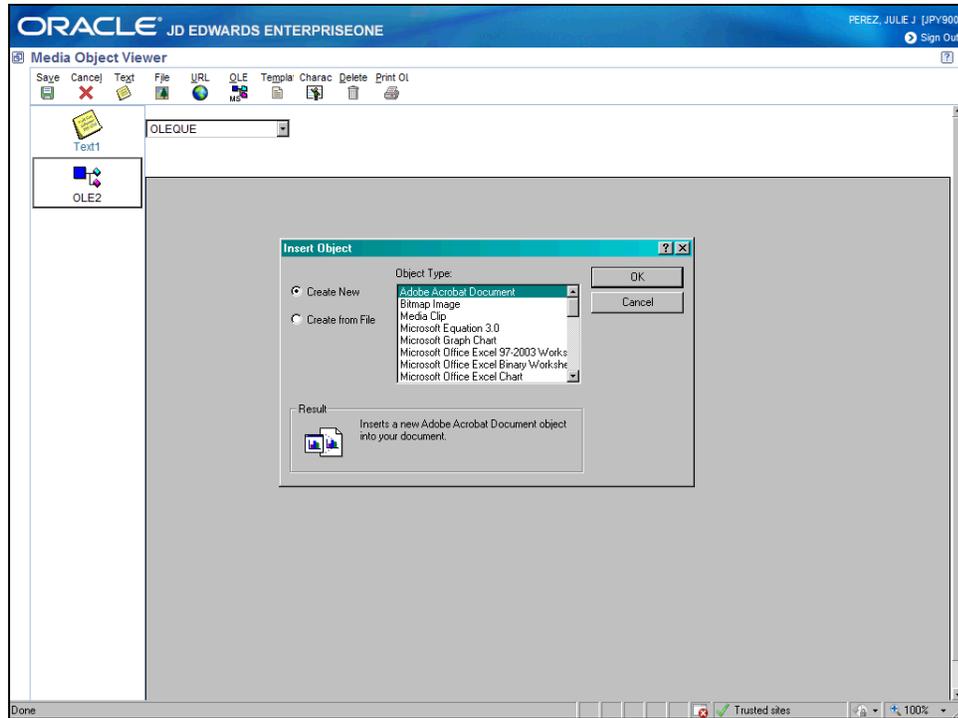
Step	Action
2.	<p>DOCUMENT HEADER ATTACHMENTS</p> <p>Click the Form button.</p> 
3.	<p>Click the Attachments menu.</p> 

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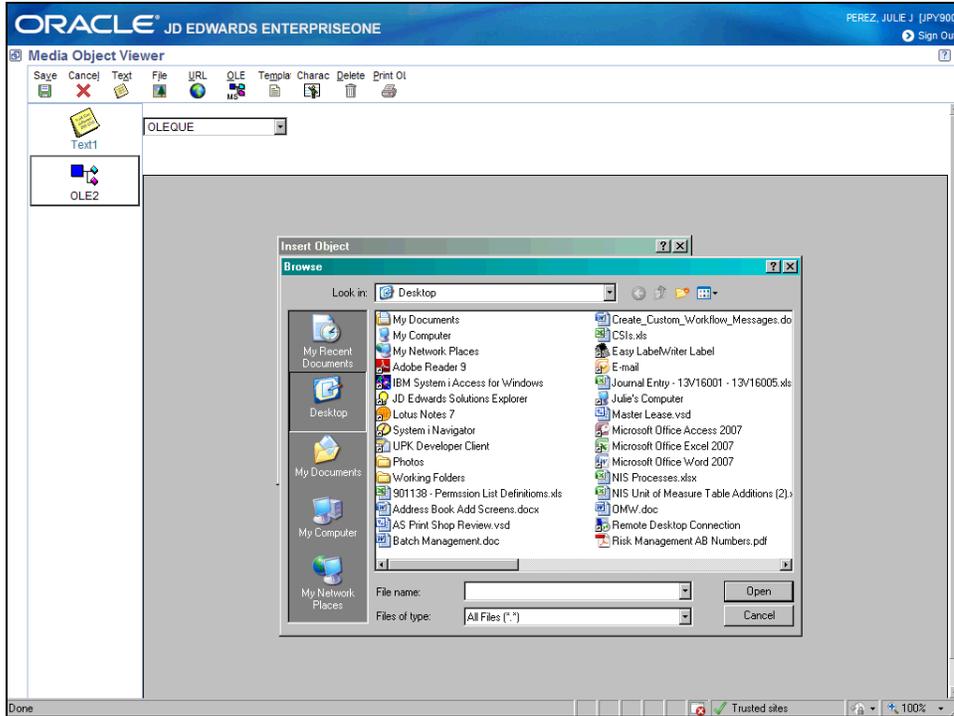
Step	Action
4.	TEXT ATTACHMENT
5.	Click the Text button. 
6.	Enter the desired information into the field.
7.	Continue to add as many attachments as needed or click the Save button to continue working with document. 
8.	OBJECT, LINKING AND EMBEDDING (OLE) ATTACHMENTS
9.	Click the OLE button. 
10.	Click the Please choose a queue list. 
11.	Click the OLEQUE list item. 



Step	Action
12.	Click the Create from File option. <input checked="" type="radio"/> Create from File
	<i>or</i> Press [Alt+F] .
13.	Click the Browse... button. <input type="button" value="Browse..."/>
	<i>or</i> Press [Alt+B] .

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Step	Action
14.	Click on the electronic file to attach. NOTE: This can be an MS Word document, an MS Excel Spreadsheet, or a pdf file
15.	Click the Open button.
	<i>or</i> Press [Alt+O] .
16.	In the Insert Object window, click the OK button.
17.	Continue to add as many attachments as needed or click the Save button to continue working with document.
18.	DETAIL LINE ATTACHMENTS When adding attachments specific to details on a document, attach to detail lines instead of document header. This is done by selecting a Row.
19.	Click the OK button.

ORACLE® JD EDWARDS ENTERPRISEONE

Perez, Julie J [JPY900] Sign Out

Work with Purchase Order - Order Detail

OK Cancel Form Row Tools

Order Detail Line Defaults Additional Properties Category Codes

Order Number 300188 OP 56650 Attachments Business Unit 65025009

Supplier 500020 MARTIN MARIETTA AGGREGATES - P Order Revision 0

Ship To 678925 NIS - ADMINISTRATIVE SERVICES Entered Date 02/05/2010

Invoice To 678943 AS - NIS Requested 02/05/2010

Buyer Number 576663 KAY MCKAY From Del Date 02/05/2010

Cancel Date

Order Attachment

Records 1 - 2 Customize Grid

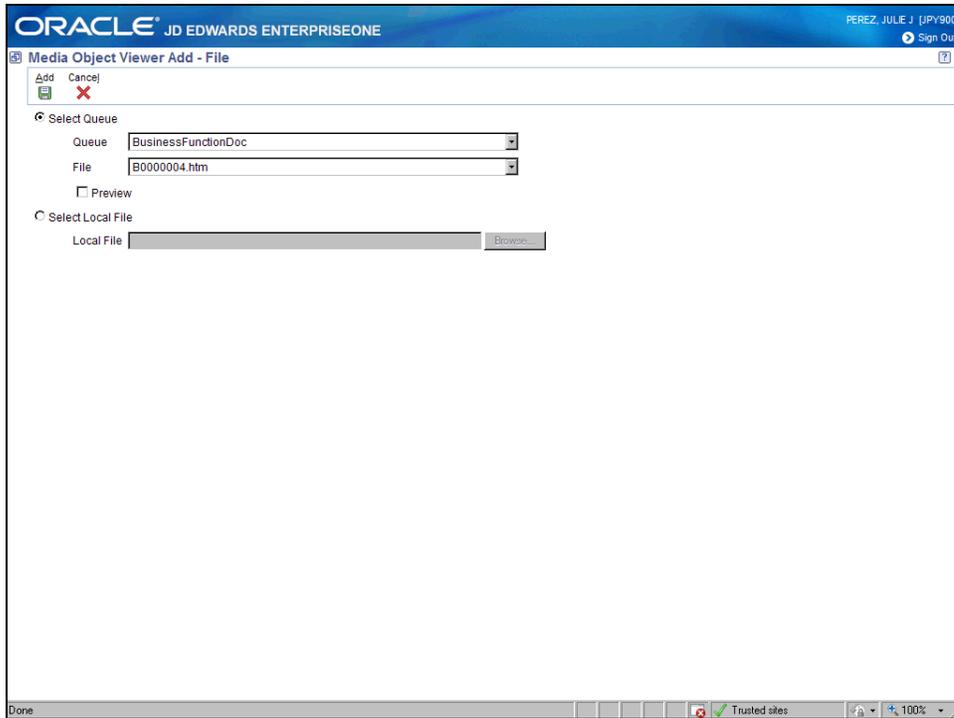
<input type="checkbox"/>	<input type="checkbox"/>	Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	92000	920	00	100.0000	EA	1.0000	100.00	EA	MANY ITEMS TO BE SPLIT

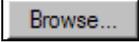
Done Trusted sites 100%

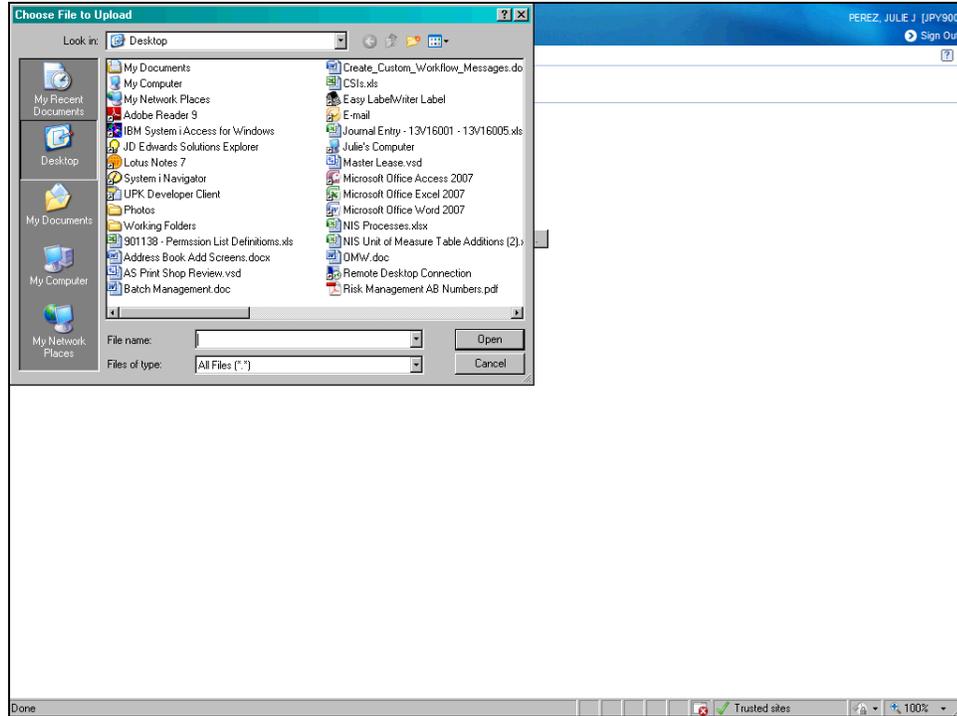
Step	Action
20.	Click the Row: option for the detail line for attachment.. 
21.	Click the Row button. 
22.	Click the Line Attachments menu. 

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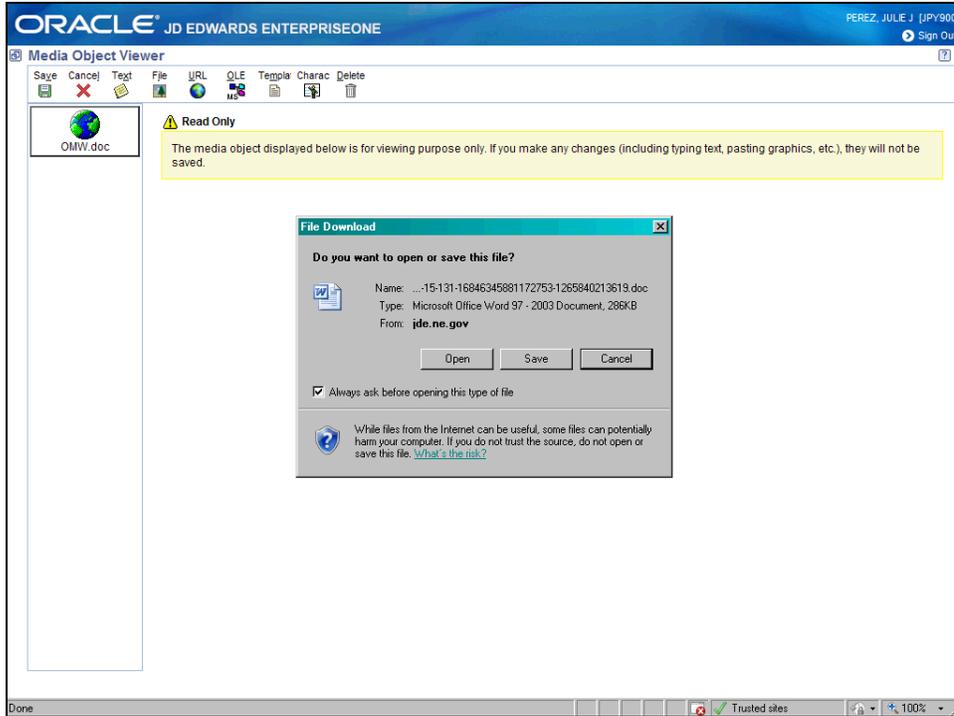
Step	Action
23.	FILE ATTACHMENT
24.	Click the File button. 
25.	Click the Select Local File radio button. 
26.	Click the Browse... button. 



Step	Action
27.	<p>Click on the electronic file to attach.</p> <p>NOTE: This can be an MS Word document, an MS Excel Spreadsheet, or a pdf file.</p> 
28.	<p>Click the Open button.</p> 
	<p>or Press [Alt+O].</p>
29.	<p>Click the Add button.</p> 

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Step	Action
30.	File Attachment MUST be opened from File Download screen prior to saving. To attach the electronic file, click the Open button. The attachment is visible on the Media Object Viewer ; however, the document can only be opened through the application (MS Word, MS Excel, Adobe Acrobat). 
	<i>or</i> Press [Alt+O] .
31.	URL ATTACHMENTS
32.	Click the URL button. 
33.	Click in the Enter URL field.
34.	Enter the desired information into the Enter URL field.
35.	Click the Preview button. 
36.	Click the Add button. 
37.	Continue to add as many attachments as needed or click the Save button to continue working with document. 

Step	Action
38.	End of Procedure.