

Working With Attachments

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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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Working With Attachments

Working with Attachments Overview

Text, pictures, and other type of files can be attached to records in the Payroll & Financial Center. Such attachments are called media objects. Different types of media objects can be attached to the same record.

The Payroll & Financial Center allows you to attach:

- Text
- Files (spreadsheets, Word docs, etc.)
- Web sites

Working With Attachments Lesson

Procedure

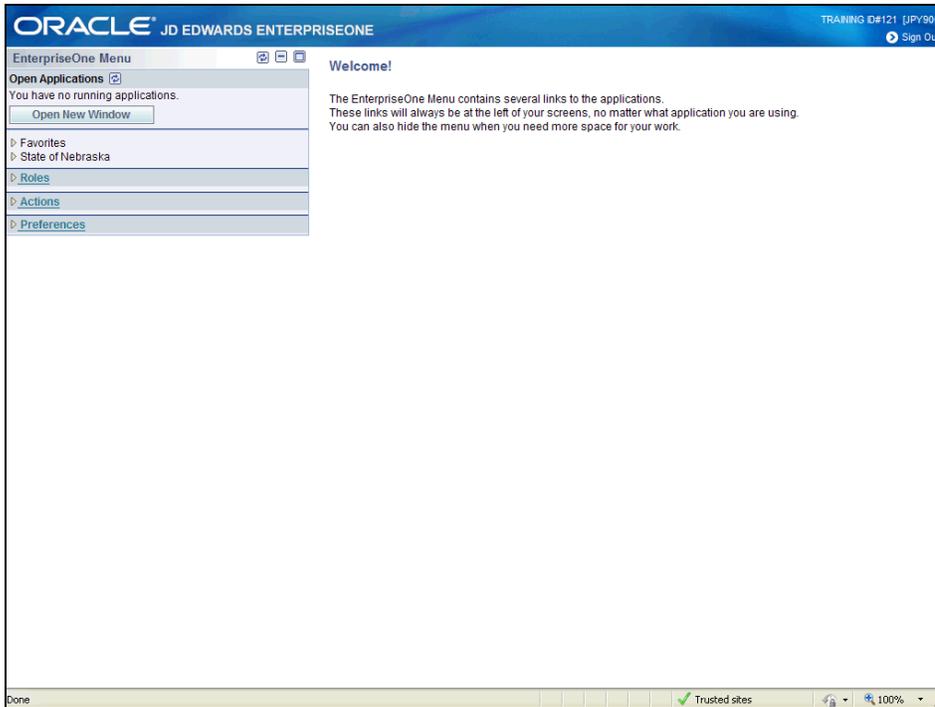
This work instruction shows how:

- ~ To Check for and View an Attachment
- ~ To Attach different Attachments
- ~ To Rename an Attachment
- ~ To Delete an Attachment

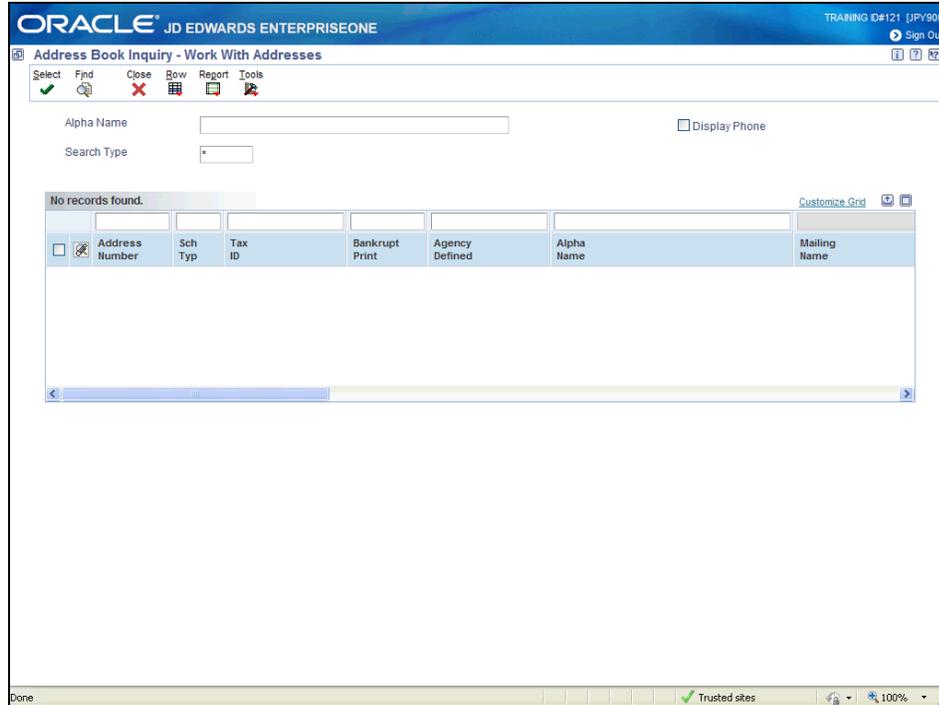
Step	Action
1.	Attachments can be utilized in any Payroll & Financial Center Module - including Address Book, Payroll, Procurement, Inventory, Accounting, A/P, and A/R. In this lesson we will work from the Address Book Inquiry screen.

Training Guide

Working With Attachments



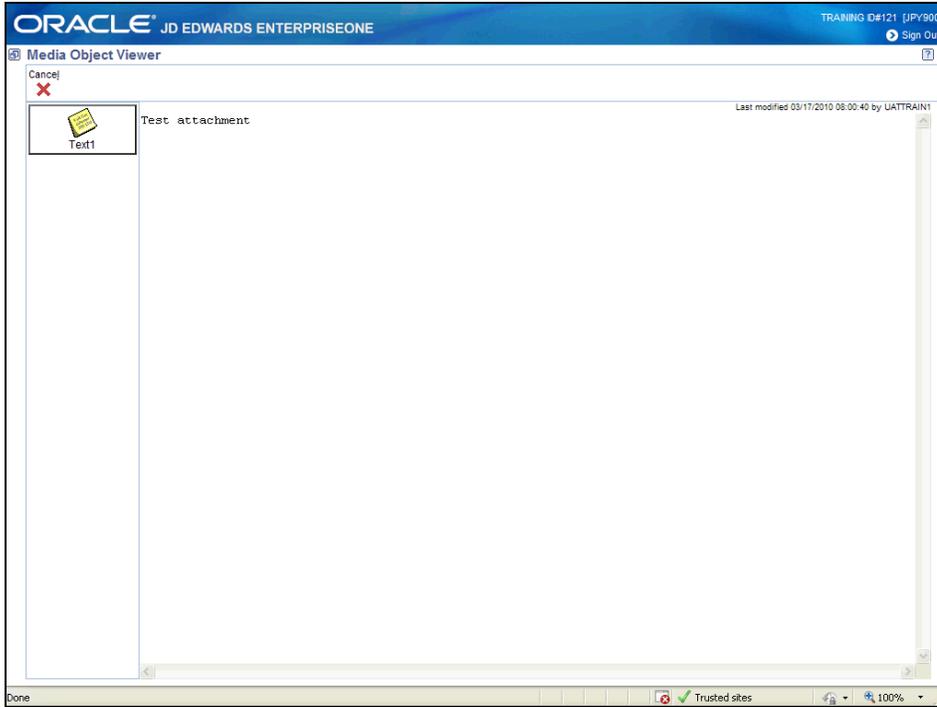
Step	Action
2.	Click the State of Nebraska link. State of Nebraska
3.	Click the Address Book link. Address Book
4.	Click the Address Book Inquiry link. Address Book Inquiry



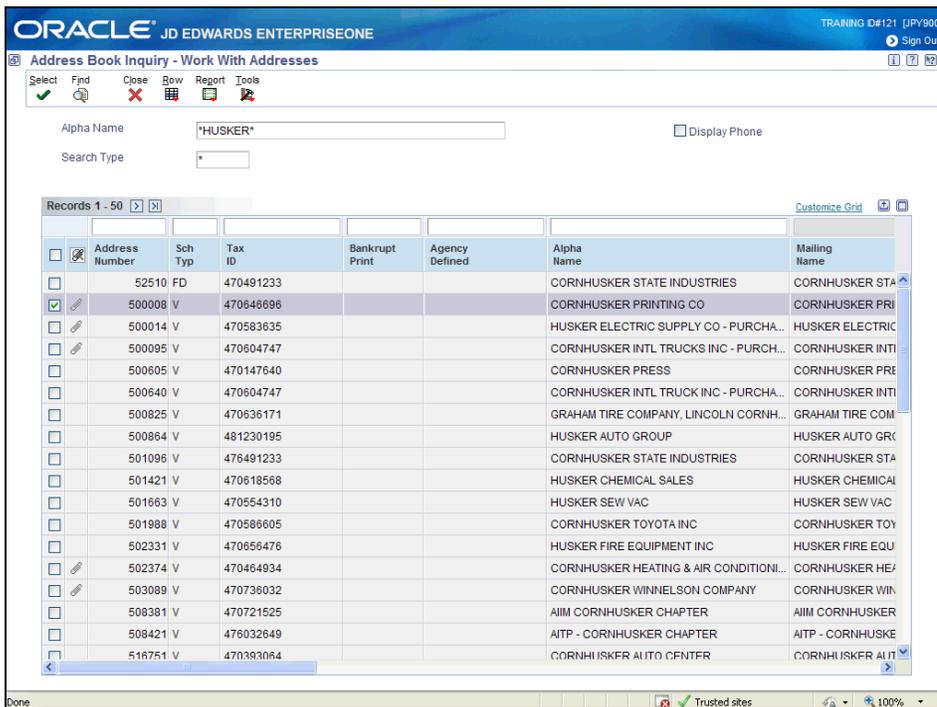
Step	Action
5.	First we will need to bring up some records. Click in the Alpha Name field.
6.	Enter the desired information into the Alpha Name field. Enter "*husker*" .
7.	Click the Find button. 
8.	A record with a paper clip icon next to it means it has attachments. If it does not have a paper clip icon then the record does not have any attachments.
9.	You can view the attachment by clicking on the paper clip icon. Click the Attachment button. 
10.	Clicking on the paper clip icon opens the Media Object Viewer window. This is where you can view all of the attachments for that record. This is a read only window so no changes can be made to any existing attachments nor can any attachment be added.

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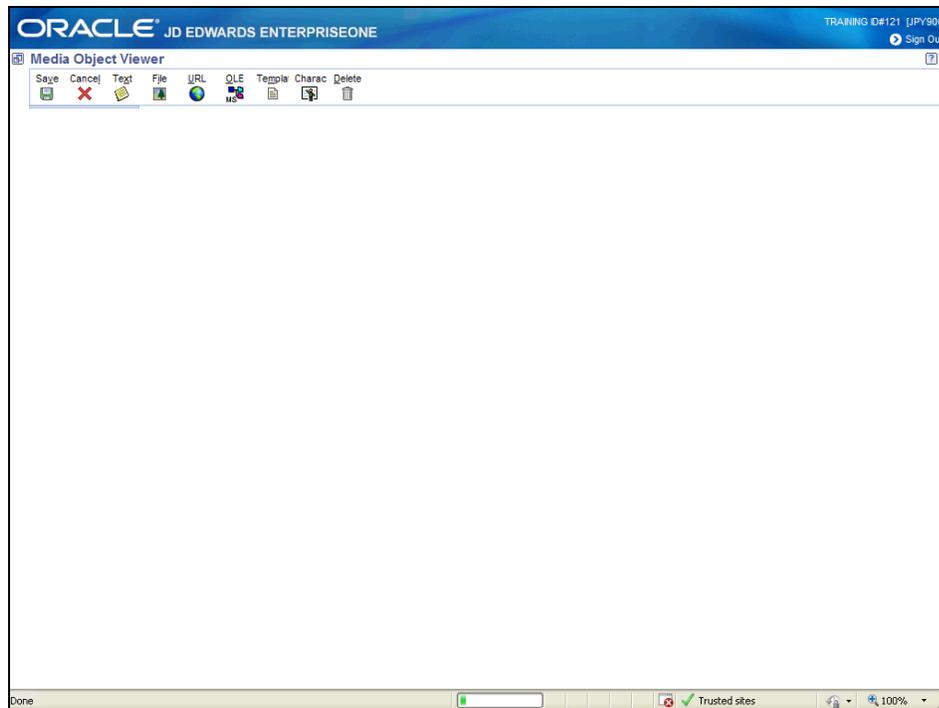
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Step	Action
11.	Click the Cancel button.



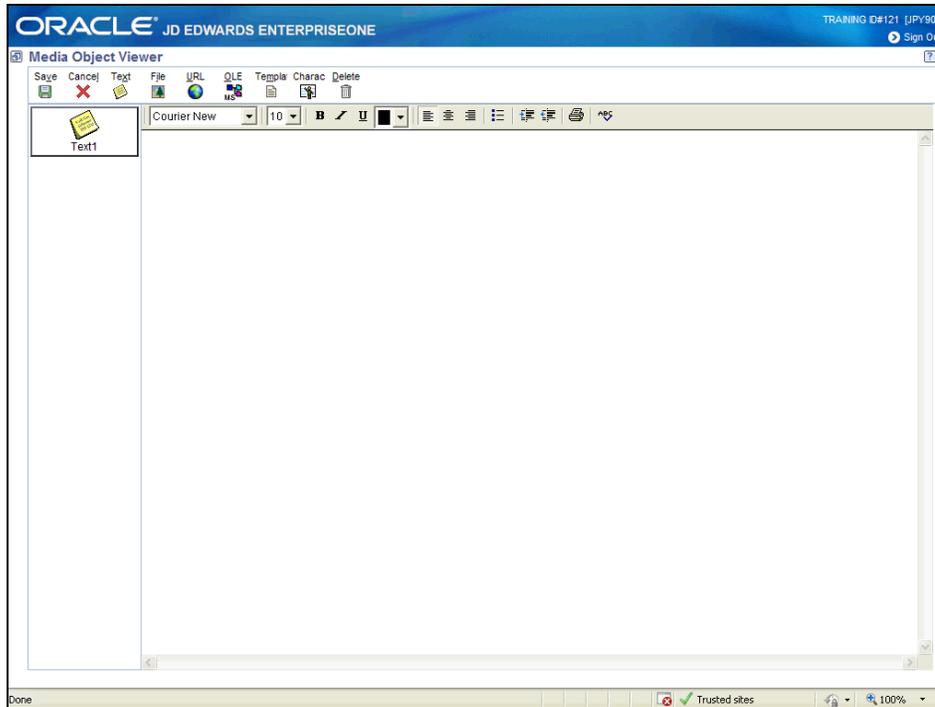
Step	Action
12.	In this next exercise we are going to learn how to add an attachment, but first we need to select a record. 
13.	Click the Row button. 
14.	Click the Attachments menu. 
15.	The top tool bar displays the different type of attachments you can add. Text , File , and OLE attachments are the most common attachments used.



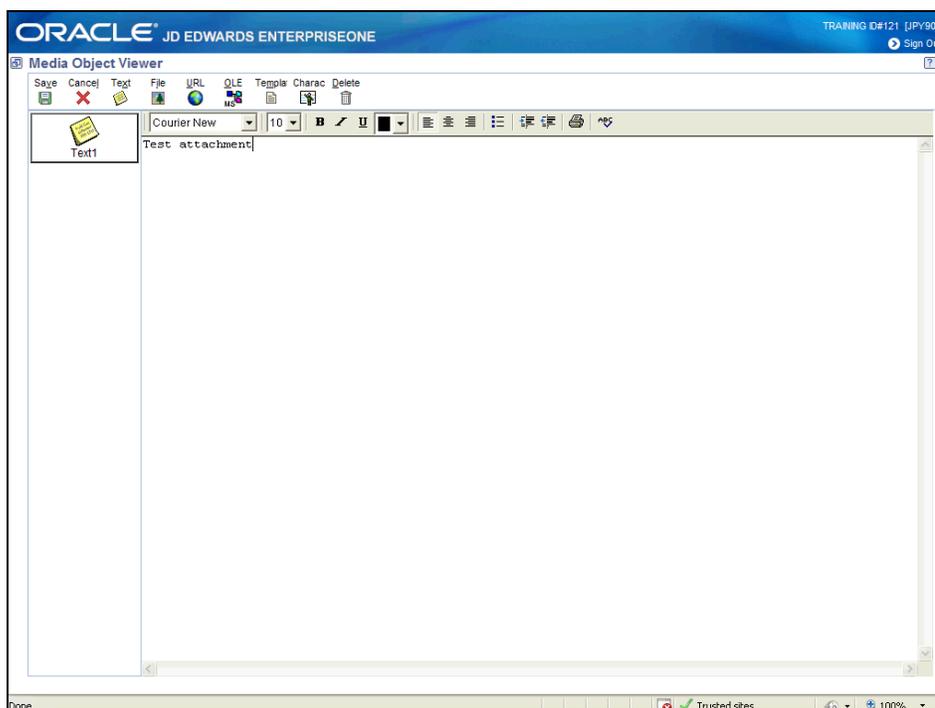
Step	Action
16.	First we are going to add a Text Attachment. Click the Text button. 

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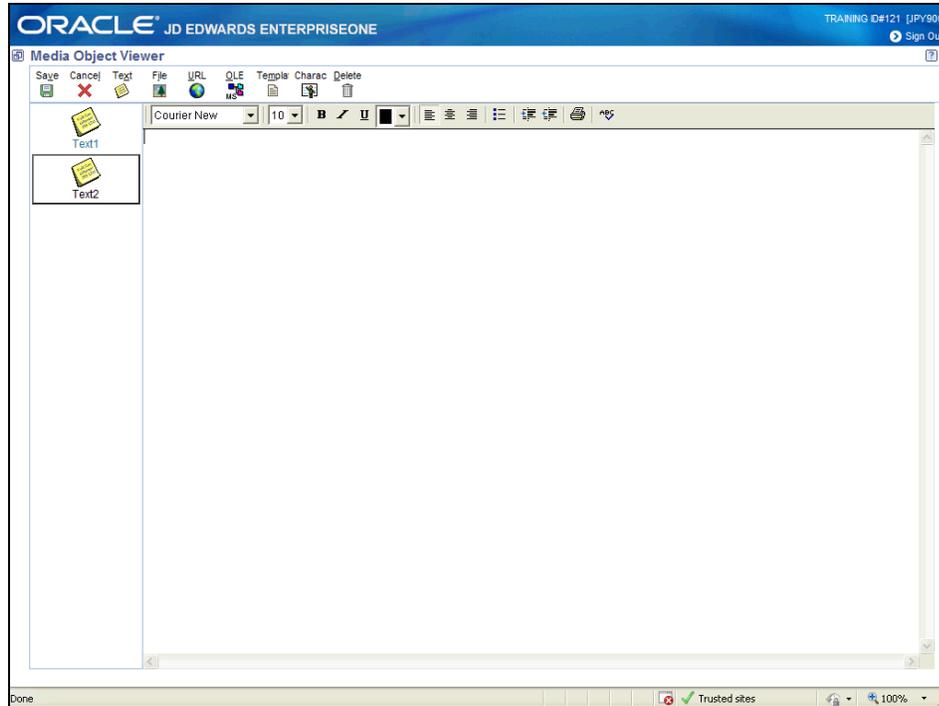
Working With Attachments



Step	Action
17.	Enter the desired information into the field. Enter "Test attachment" .
18.	The Text Toolbar is similar to the Text Toolbar in Word. Here you can change the type, size, color and style of font.



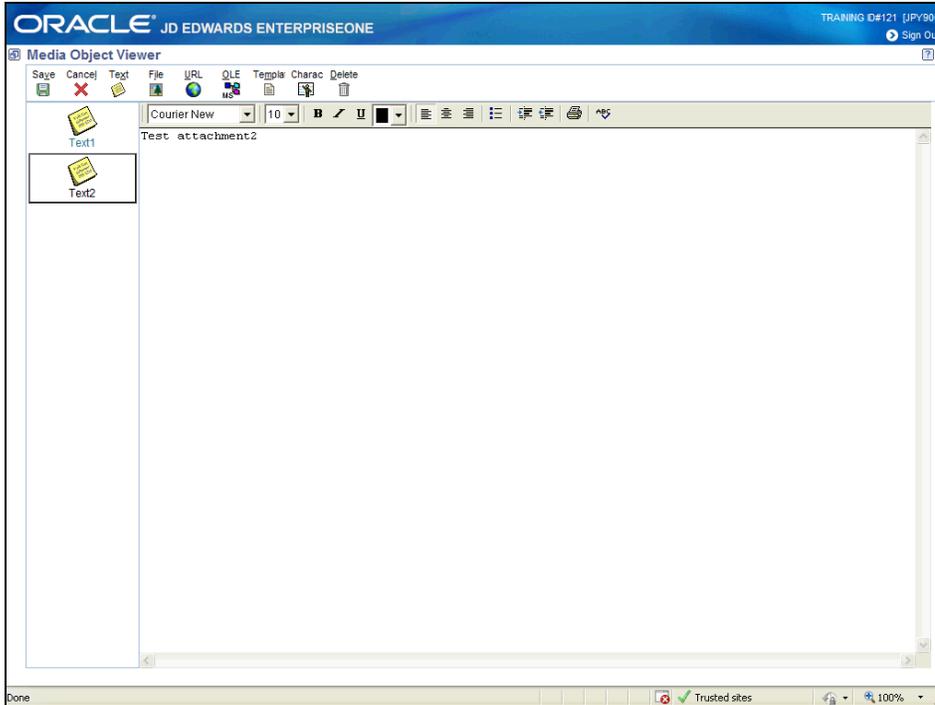
Step	Action
19.	<p>You can add more than one attachment to a record. We are going to add another Text attachment.</p> <p>Click the Text button.</p> 

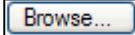


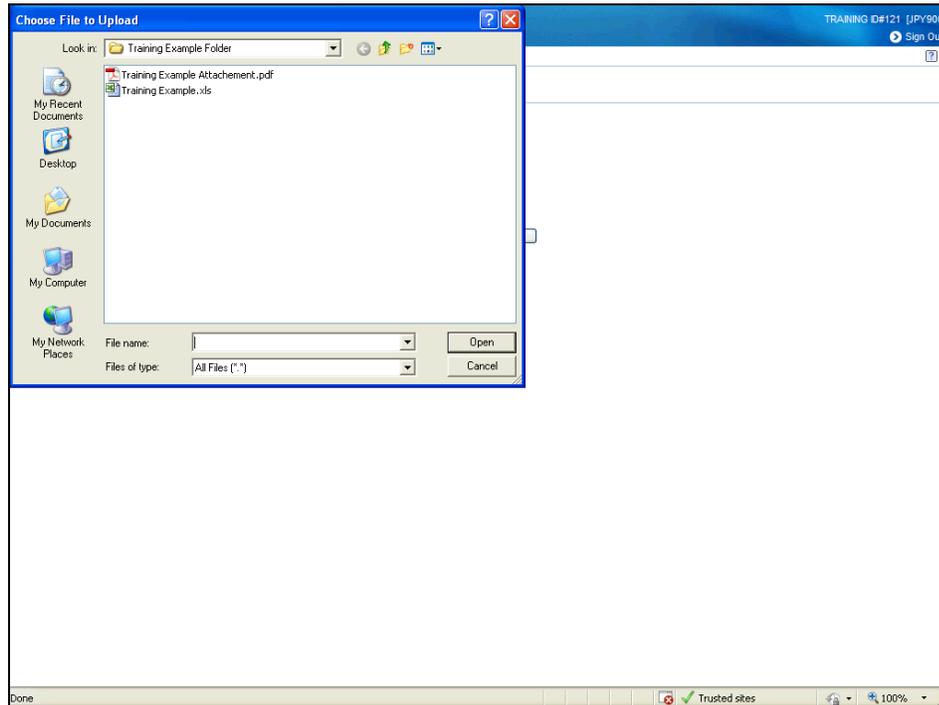
Step	Action
20.	<p>Enter the desired information into the field. Enter "Test attachment2".</p>

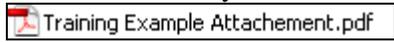
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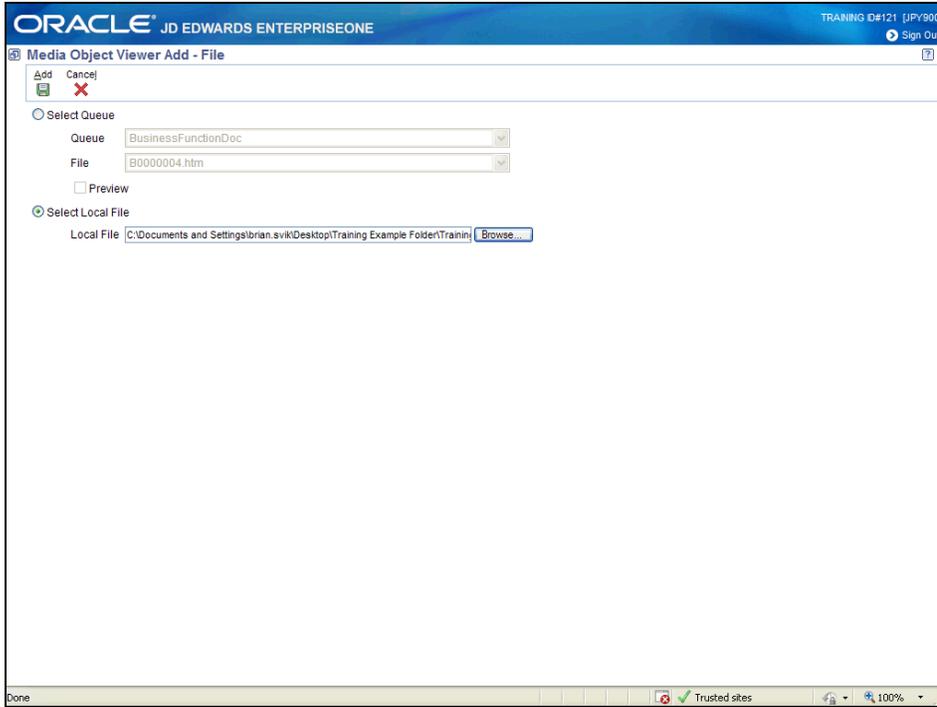
Step	Action
21.	You can rename an attachment. we are going to rename the two Text Attachments. Click the name of the Text2 attachment. 
22.	Enter the desired information into the Item field. Enter " Attachment 2 ".
23.	Click the Text button. 
24.	Click the name of the Text1 attachment. 
25.	Enter the desired information into the Item field. Enter " Attachment 1 ".
26.	A File Attachment allows you to attach a file such as Word, Excel, PDF, etc. A File Attachment cannot be changed . . . it is a read only document. An OLE Attachment allows you to add the same type of files as a File Attachment , except it allows you to make changes to it.
27.	Click the File button. 
28.	Click the Select Local File option. 
29.	Click the Browse button. 



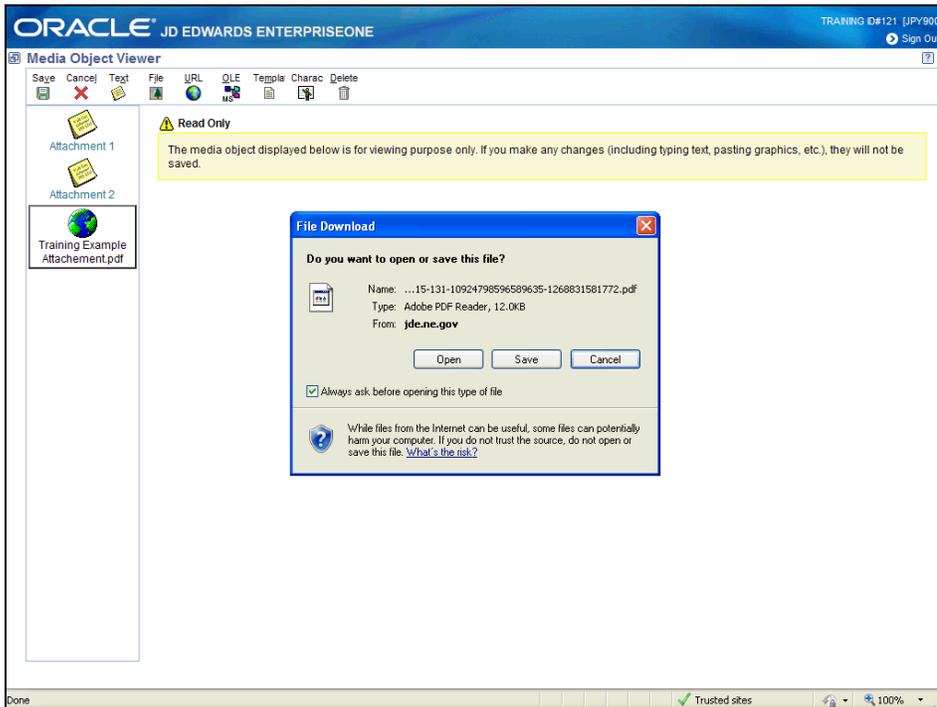
Step	Action
30.	Browse to the file you wish to attach and click it 
31.	Click the Open button. 

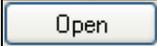
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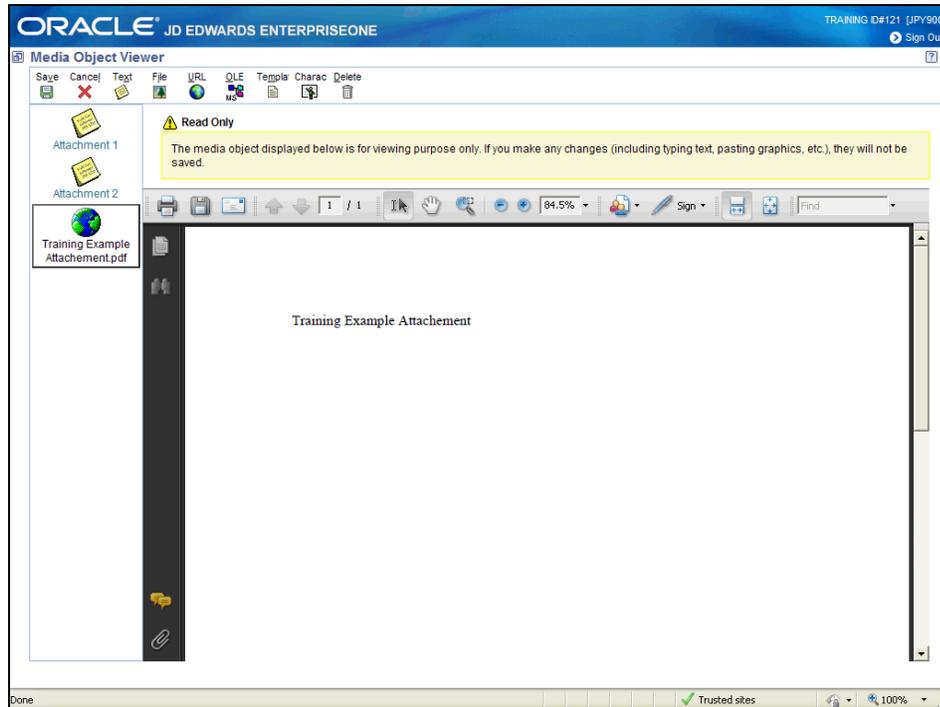
Working With Attachments



Step	Action
32.	Click the Add button. 



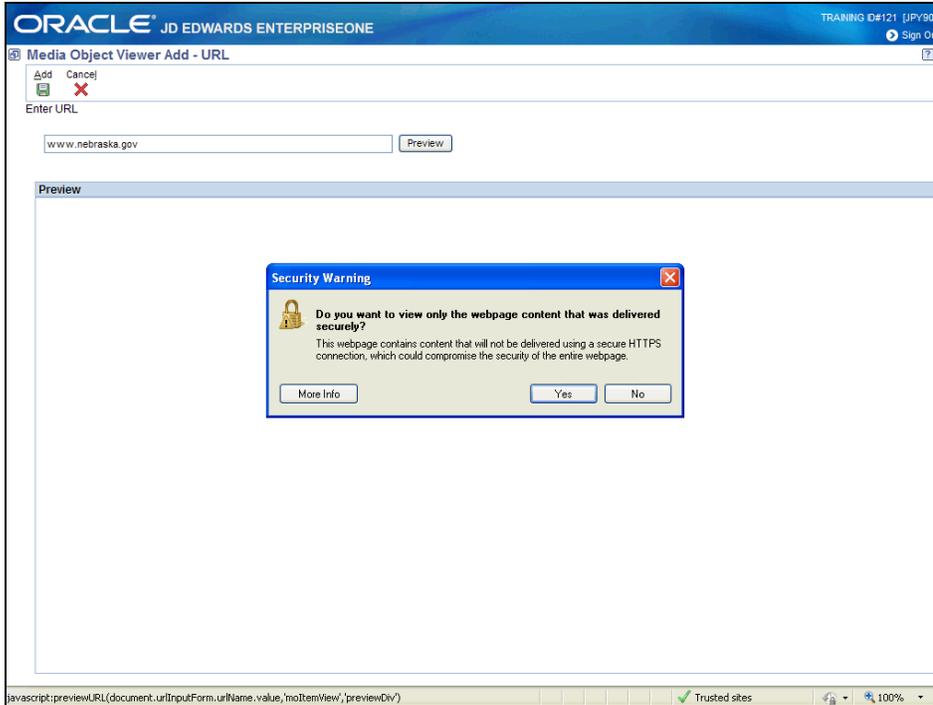
Step	Action
33.	If prompted click the Open button. 
34.	The attached file appears in the window. In addition a Read Only notice appears at the top of the screen stating that the File Attachment cannot be changed.



Step	Action
35.	Next we are going to attach a web site (or URL) To this record. Click the URL button. 
36.	Enter the desired information into the Enter URL field. Enter " www.nebraska.gov ".
37.	Click the Preview button. 

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Step	Action
38.	<p>If you get a Security Warning you will need to make sure you have the correct Internet Explorer settings.</p> <p>If you click Yes the page will not display correctly. Click the No button to ensure the page displays as it should.</p> <div data-bbox="345 1178 496 1226" style="border: 1px solid black; padding: 2px; display: inline-block;">No</div>
39.	<p>By clicking the Preview button you can make sure you have the correct web site before you actually attach it to the record.</p>



Step	Action
40.	Click the Add button. 
41.	If the web site address of the attachment ever changes you will need to update the attachment, otherwise it will not display properly.
42.	You can delete attachments from a record. Anyone can delete a record so it is vital to be careful when doing so. In this lesson we are going to delete one of the Text Attachments .
43.	Click the Text button. 
44.	Click the Delete button. 
45.	The Attachment 2 no longer appears.
46.	Click the Save button. 
47.	Now the record has a paper clip icon indicating it has attachments.
48.	You have successfully completed the Working with Attachments course. End of Procedure.