

Entering Attachments to Order Header

Overview

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

If you have information that is specific to an entire purchasing document (Purchase Requisition, Quotation Request, Contract, or Purchase Order), you can include an attachment on the Order Header.

 Attachments can also be made to Bid Responses.

Text Attachments

 Only the first Text Attachment 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 an order header on a Purchase Requisition will appear on the corresponding order header of any document generated (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 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 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 be opened in Read Only format and can not be modified once they are attached to the document in NIS. 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 Attachments to Order Header](#).

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 utilized in 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 Attachments: Text (To Order Header)

Start this instruction from Order Header window.

 To get to the Order Header window:

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

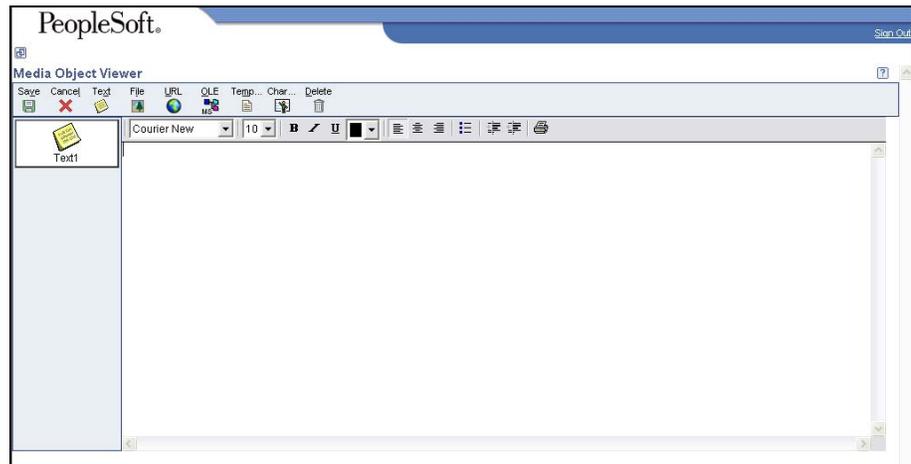
Click **Find**.

Choose the Order Number if not defaulted.

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

1. Click **Form, Attachments**. The Media Object Viewer window appears.

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



- Click in the **blank area** of the window.
- Enter the free form text desired. (Or cut and paste from another document.)
-  Text attachments do not spell check.
-  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.
- Click **Save**. The Order Header window appears.

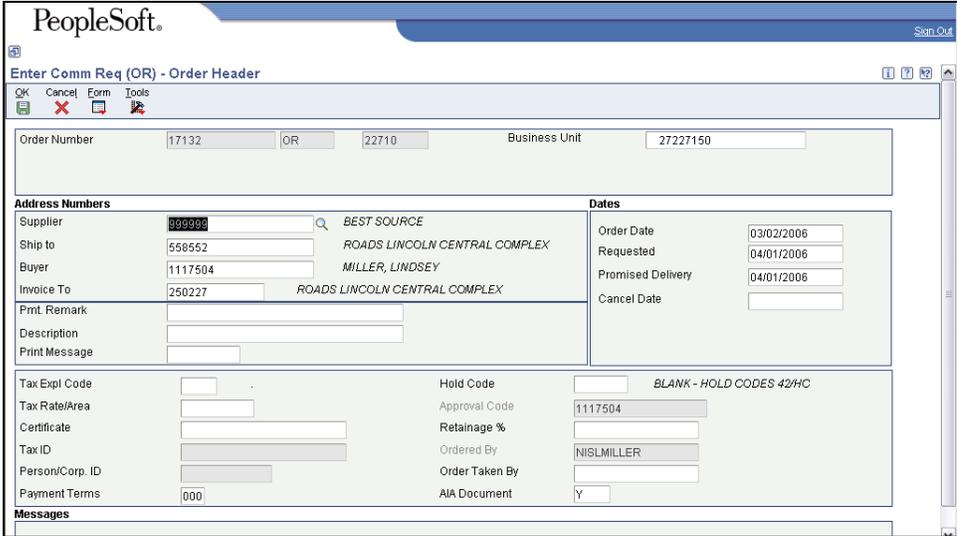
Address Numbers		Dates	
Supplier	000000 BEST SOURCE	Order Date	03/02/2006
Ship to	558552 ROADS LINCOLN CENTRAL COMPLEX	Requested	04/01/2006
Buyer	1117504 MILLER, LINDSEY	Promised Delivery	04/01/2006
Invoice To	250227 ROADS LINCOLN CENTRAL COMPLEX	Cancel Date	
Tax Expt Code		Hold Code	BLANK - HOLD CODES 42/HC
Tax Rate/Area		Approval Code	1117504
Certificate		Retainage %	
Tax ID		Ordered By	NISLMILLER
Person/Corp. ID		Order Taken By	
Payment Terms	000	AIA Document	Y

Messages: Attachments

-  Note that the Messages field populates with "Attachments" if Order Header attachment(s) exist.
- Continue to work with the purchasing document as needed.

Enter Attachments: Object Linking and Embedding, OLE (To Order Header)

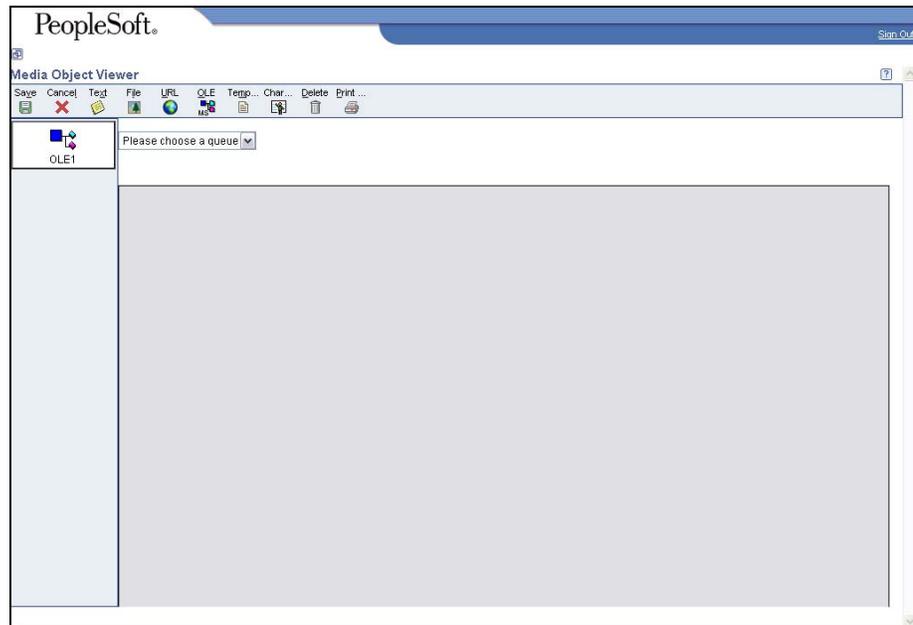
- To get to the Order Header window:
 - Enter the **order number** in the Order Number field, and the **order type** if not defaulted.
 - Click **Find**.
 - Choose the Order Number if not defaulted.
 - Click **Select**. The Order Header window appears.



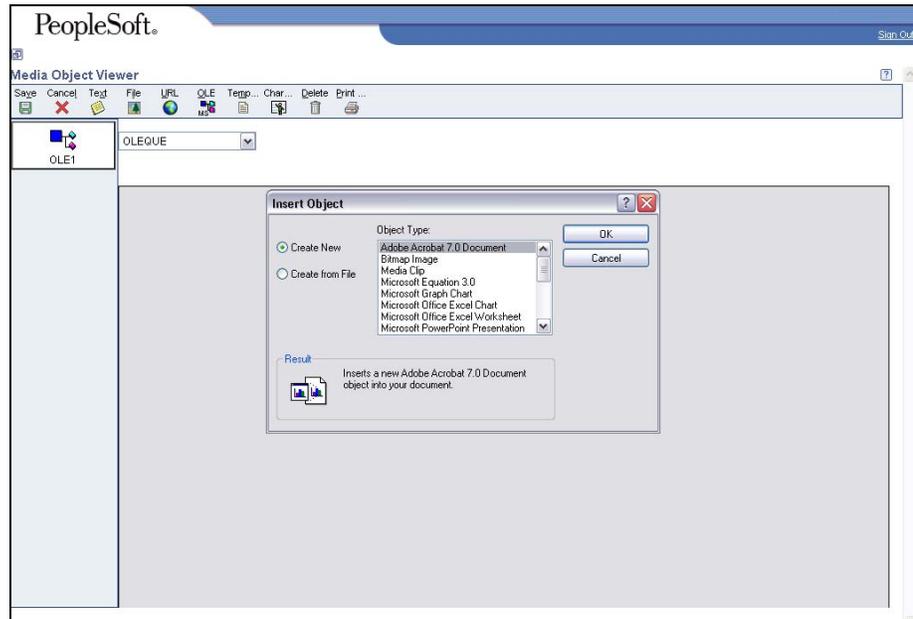
- 1. Click **Form, Attachments**. The Media Object Viewer window appears.



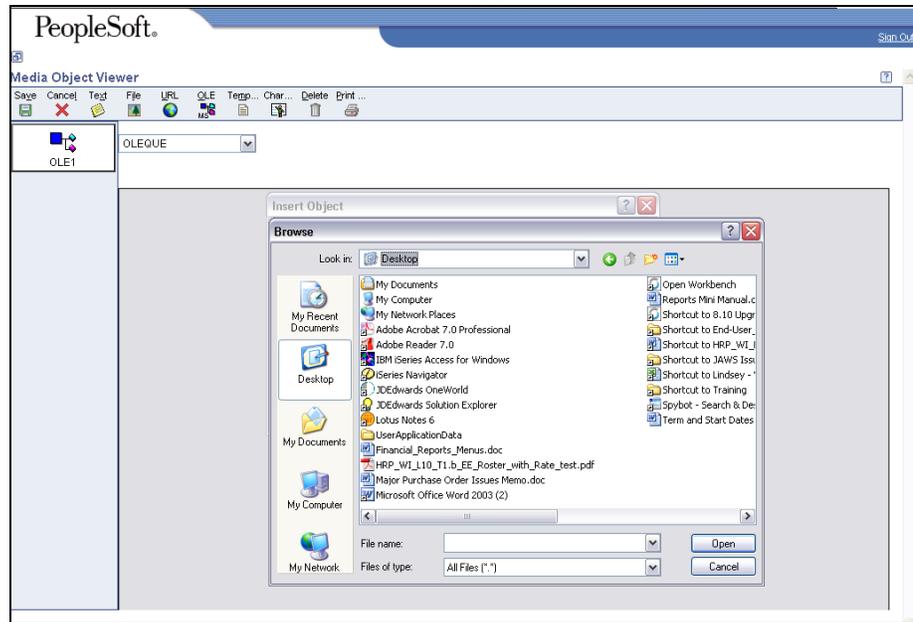
- 2. Click **OLE**. The Media Object Viewer window appears.



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



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



7. Browse for the file that you want to attach. This can be a Word (.doc), Excel (.xls), or PDF (.pdf) file.
8. Choose the file.
9. Click **Open**.
10. 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 document, you can select it and then return to the OLE attachment to view and revise it.
11. Click **Save**. The Order Detail window appears.
12. Continue to work with the purchasing document as needed.
-  Attachments made to the Order Header can be accessed from the "Work with Order Header" window by choosing the document and clicking **Row, Order Attachments**.

Enter Attachments: File (To Order Header)

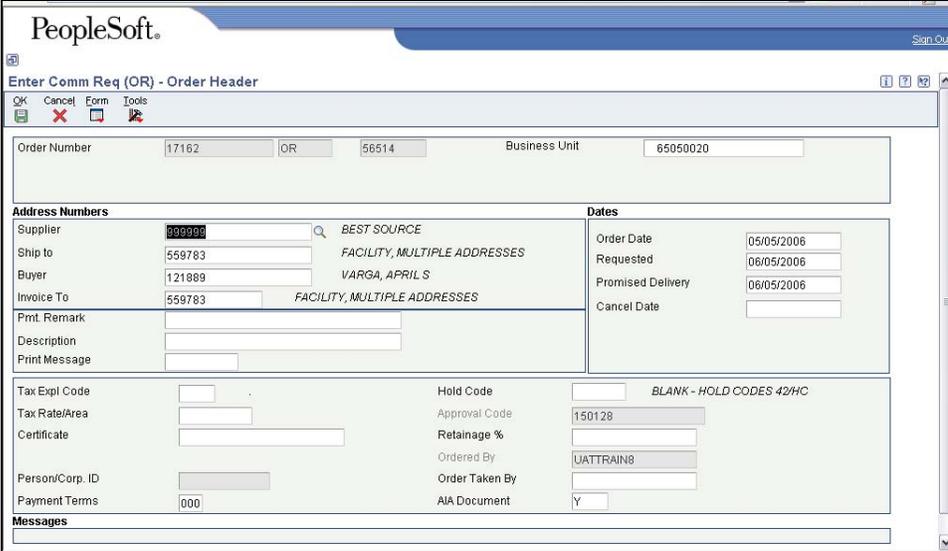
 To get to the Order Header window:

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.



1. Click **Form, Attachments**. The Media Object Viewer window appears.

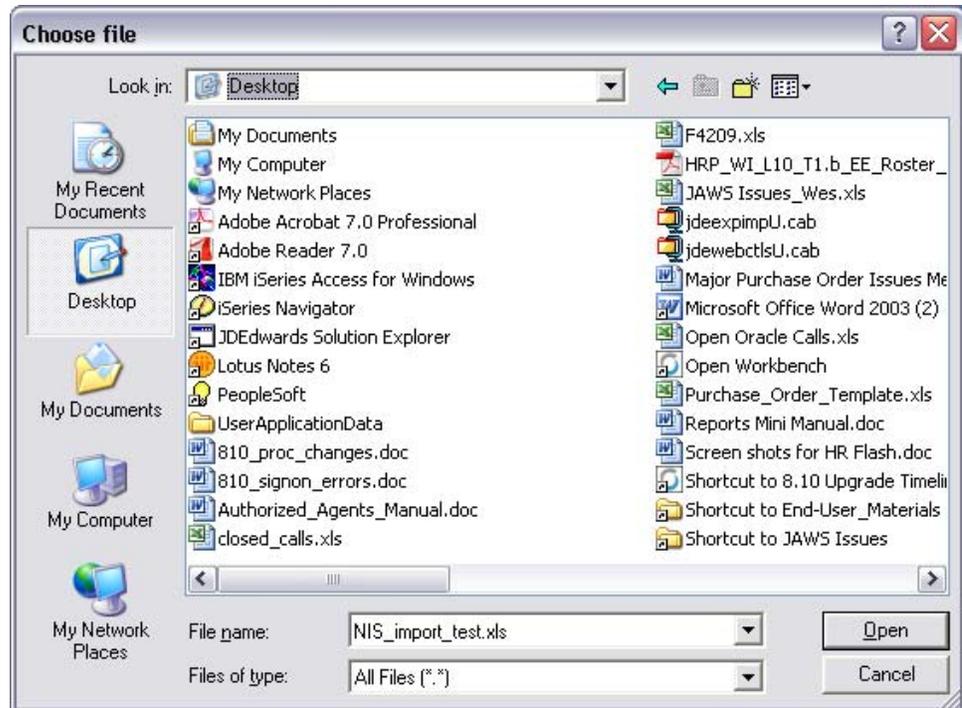


2. Click **File**. The Media Object View Add – File window appears.

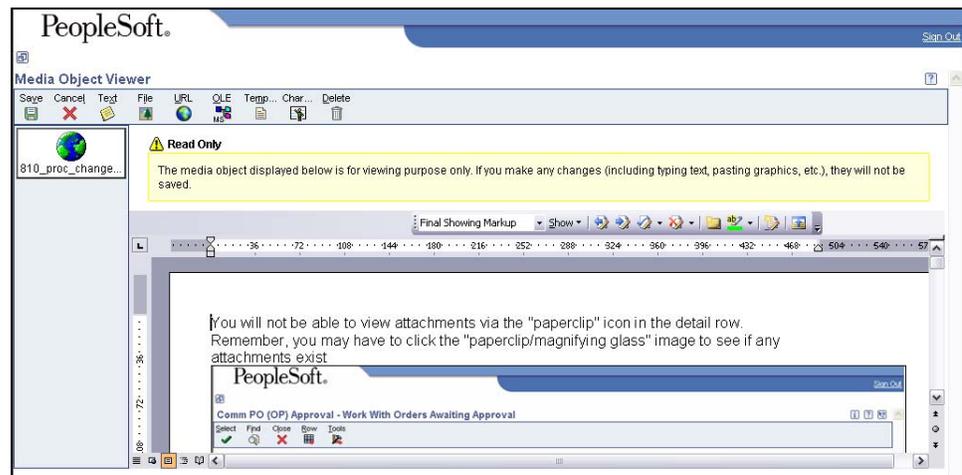


3. Choose **Select Local File**.

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



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



9. Click **Save**. You will return to the Order Header.
 10. Continue to work with the purchasing document as needed.
-  Attachments made to the Order Header can be accessed from the "Work with Order Header" window by choosing the document and clicking **Row, Order Attachments**.

Enter Attachments: URL (To Order Header)

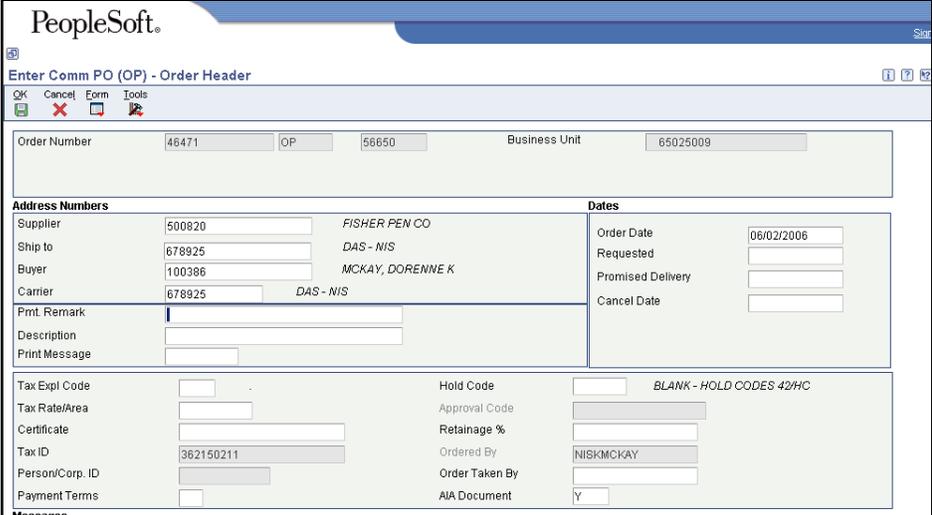
 To get to the Order Header window:

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.



Order Number 46471 **OP** 56650 **Business Unit** 65025009

Address Numbers		Dates	
Supplier	500820 FISHER PEN CO	Order Date	06/02/2006
Ship to	678925 DAS - NIS	Requested	
Buyer	100386 MCKAY, DORENNE K	Promised Delivery	
Carrier	678925 DAS - NIS	Cancel Date	
Pmt. Remark			
Description			
Print Message			

Tax Expt Code		Hold Code	BLANK - HOLD CODES 42/HC
Tax Rate/Area		Approval Code	
Certificate		Retainage %	
Tax ID	382150211	Ordered By	NISKMCKAY
Person/Corp. ID		Order Taken By	
Payment Terms		AIA Document	Y

1. Click **Form, Attachments**. The Media Object Viewer window appears.

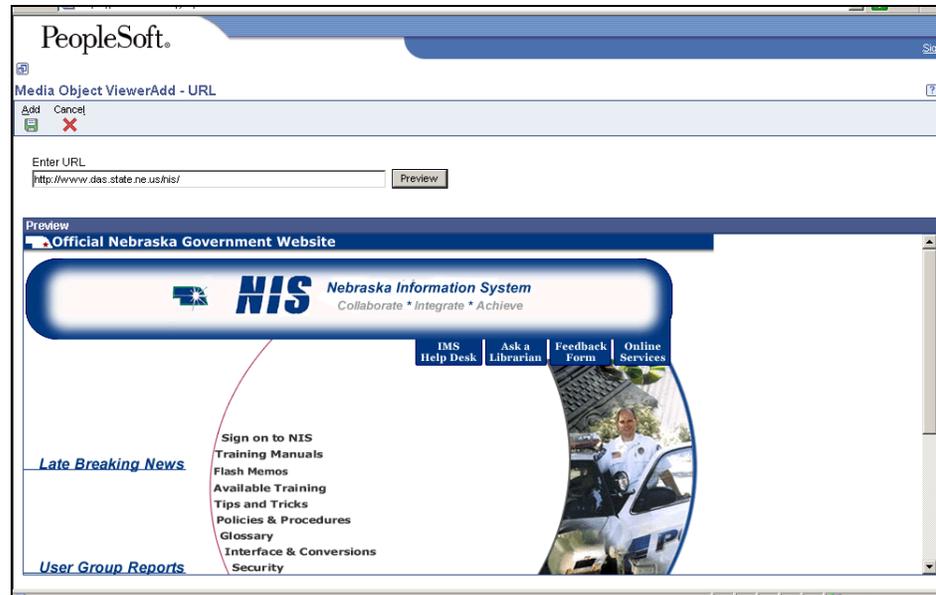


2. Click **URL**. The Media Object View Add – File window appears.



3. Enter the URL in the box. (Ex. www.nis.ne.gov)

4. Click **Preview**. The URL attached will be shown below.



5. Click **Add**.
 6. Click **Save**.
-  Attachments made to the Order Header can be accessed from the "Work with Order Header" window by choosing the document and clicking **Row, Order Attachments**.