

Working with Attachments

Overview

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

NIS allows you to attach:

- Text
- Graphics
- Photos
- Drawings
- Spreadsheets
- Video images
- Sound
- Program shortcuts

This work instruction shows how:

[To Check for and View an Attachment](#)

[To Attach and Delete a Media Object to a Record](#)

[To Rename an Attachment](#)

[To Print an Attachment](#)

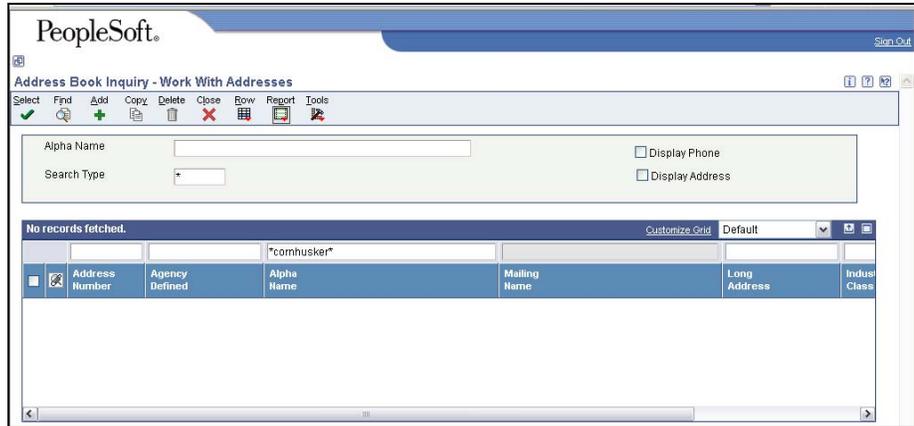
Steps

Start this work instruction by navigating through the Address Book, then clicking **Address Book Inquiry** to display the Work With Addresses search window.

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

To Check for and View an Attachment

1. On the QBE line, type ***cornhusker*** in the Alpha Name field.



2. Click **Find**.

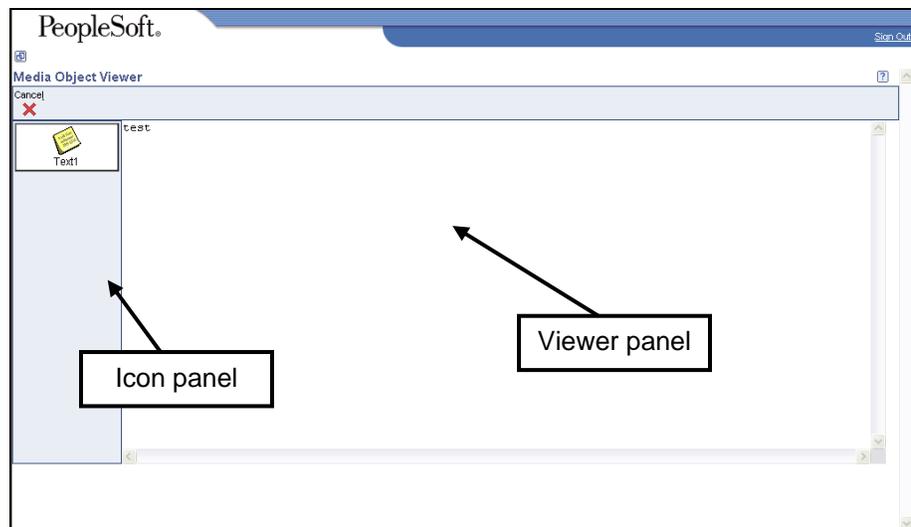
 Note the Attachment button at the top of the grid. Also, note the Attachment icon to the left of each row.



3. Click the Attachment button.



4. Verify that the Attachment icon at the row with **Cornhusker Press** in the Alpha Name field has changed from  to  and that other rows' attachment icons are blank.
-  The icon changes indicate that the records displayed in rows with  icons in the left-most column have attachments, and that records displayed in rows with a blank icon there do not.
5. Choose the row with **Cornhusker Press** in the Alpha Name field.
6. Click the **Attachment icon** to the left of the row.
-  If this is your first time accessing the Media Object Viewer window, you will encounter a Security Warning pop-up window. Click **Yes**. If you already have the required plug-in, then the pop-up window will not display.
7. Review the Media Object Viewer window.



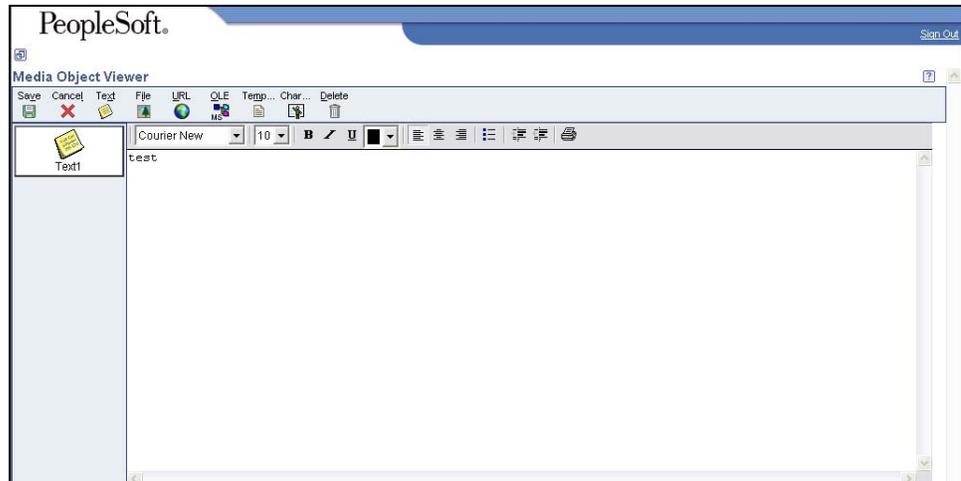
-  This view of the Media Object Viewer window is read-only. You can neither edit the attachment nor add another one.
-  The left side of the window is called the *icon panel*; the right side is called the *viewer panel*.
8. Click **Cancel** to return to the Work with Addresses search window.

To Attach and Delete a Media Object to a Record

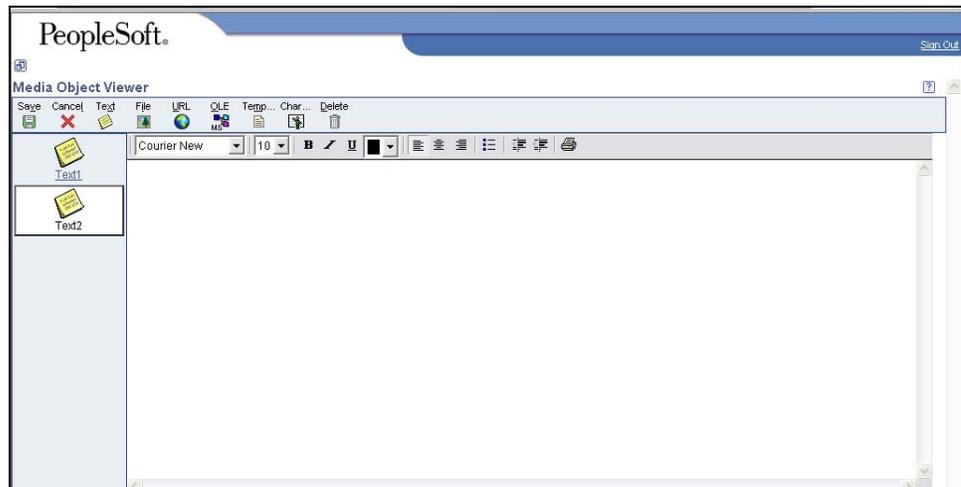
Start at the Work with Addresses search window for the record from step 8 under [To Check for and View an Attachment](#).

 If you do not have access to Microsoft Excel, or if you run into any technical difficulties importing it into NIS, then skip steps 7 through 11 of this task.

1. Verify that there is a checkmark next to the row with **Cornhusker Press** in the Alpha Name field.
-  If there is no checkmark there, then choose the row with **Cornhusker Press** in the Alpha Name field.
2. Click **Row, Attachments**.



3. Click **Text**.



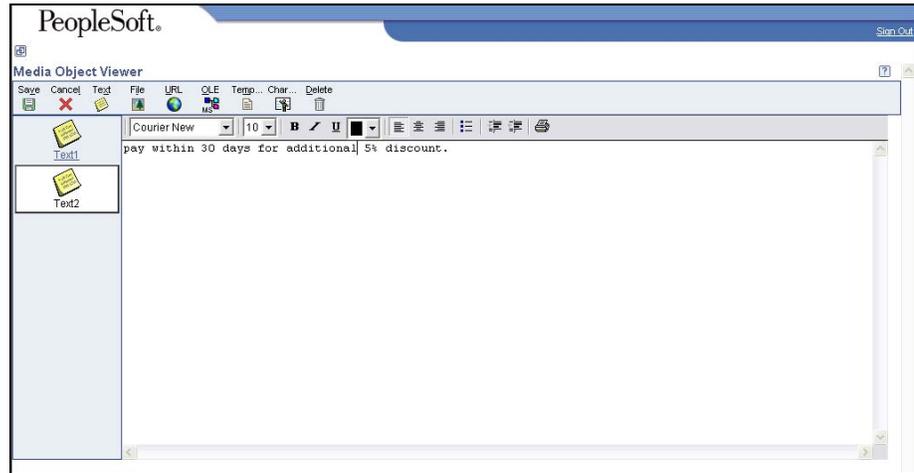
 Recall that, in the read-only view displayed in step 7 of [To Check for and View an Attachment](#), the only button displayed is **Cancel**. The view we use going forward also displays buttons to:

- Save and exit (**Save...**)
- Add text (**Text**)
- Add an image (**Image**)
- Add a web page (**URL/...**)
- Add a file (**OLE**)
- Add an NIS template (**Tem...**)
- Categorize an attachment (**Char...**)
- Delete an attachment (**Delete**)

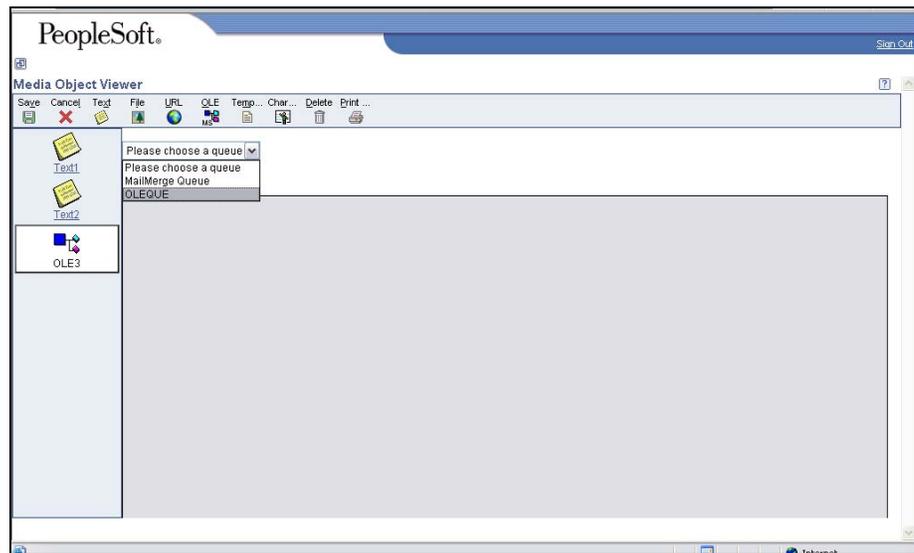
4. Verify that a blank text field is displayed in the viewer panel and **Text2** is displayed in the icon panel.

 If you click **Text1**, you will see the original text note.

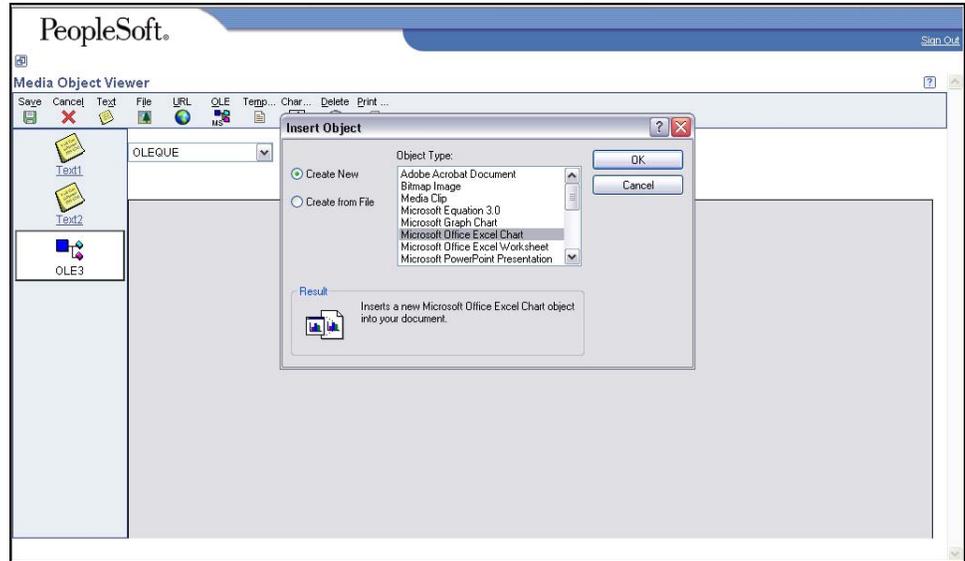
5. In the viewer panel, type **pay within 30 days for additional 5% discount.**



6. Click **OLE**.



7. Click on the down arrow to the right of the box that reads, "Please choose a queue."
8. Choose "OLEQUE." An Insert Object window appears.
9. From the Insert Object dialog box choose **Create New**, then click **Microsoft Office Excel Worksheet** from the Object Type field.



10. Click **OK**.

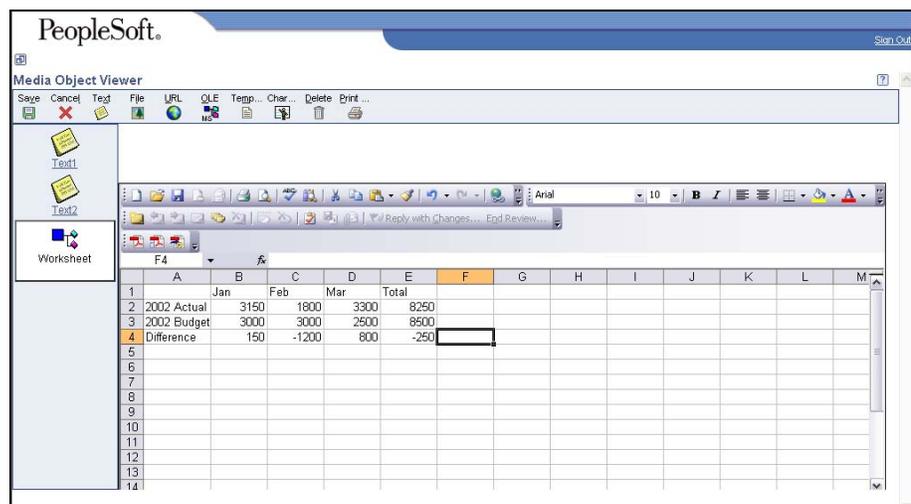
 If you want to browse through folders in your computer for a file to attach to the record, then click **Create from File** instead of Create New.

11. Verify that a new icon, **Worksheet**, is highlighted in the icon panel and replaces the OLE icon.

12. At the Microsoft Excel worksheet displayed in the viewer panel, **enter this array, starting in cell A1:**

	Jan	Feb	Mar	Total
2002 Actual	3150	1800	3300	8250
2002 Budget	3000	3000	2500	8500
Difference	150	-1200	800	-250

 You can either type in all the values or use simple formulas for the Total column and Difference row.

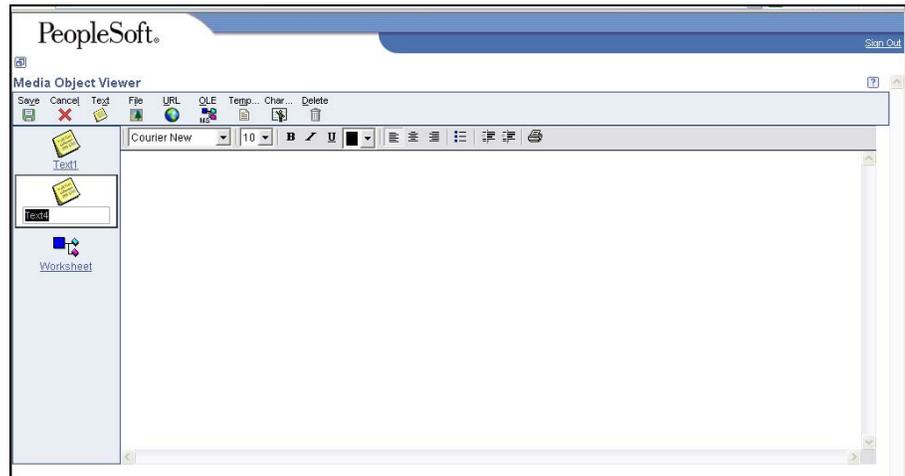


13. Click **Save ...** to display the Work with Addresses search window, with the Cornhusker Press row chosen.

14. Click **Row, Attachments**.
15. Click the **Text2** icon.
16. With the Text2 icon highlighted and the "pay within 30 days ..." text displayed, click **Delete**.
17. Click **Save...** to display the Work with Addresses search window, with the Cornhusker Press row chosen.

To Rename an Attachment

1. From the Work with Addresses search window, choose the row with **Cornhusker Press** in the Alpha Name field.
2. Click **Row, Attachments**.
3. At the Media Object Viewer window, click the **Text** icon.
4. Click on the word **Text** below the icon.
5. Double-click the word **Text**.



6. Type **Discount**.
7. Click the **Worksheet** icon.



To Print an Attachment



If you do not have access to a printer, skip this task.

1. At the Media Object Viewer window from step 8 under [To Rename an Attachment](#), verify that the Worksheet icon is highlighted and the Microsoft

Excel file you created in step 11 of [To Attach and Delete a Media Object to a Record](#) is displayed.

2. Click **Print**.
3. Proceed with the dialog boxes, if any, that you usually navigate through.
4. Click **Cancel** to return to the Work with Addresses window.
5. Click **Close**.