


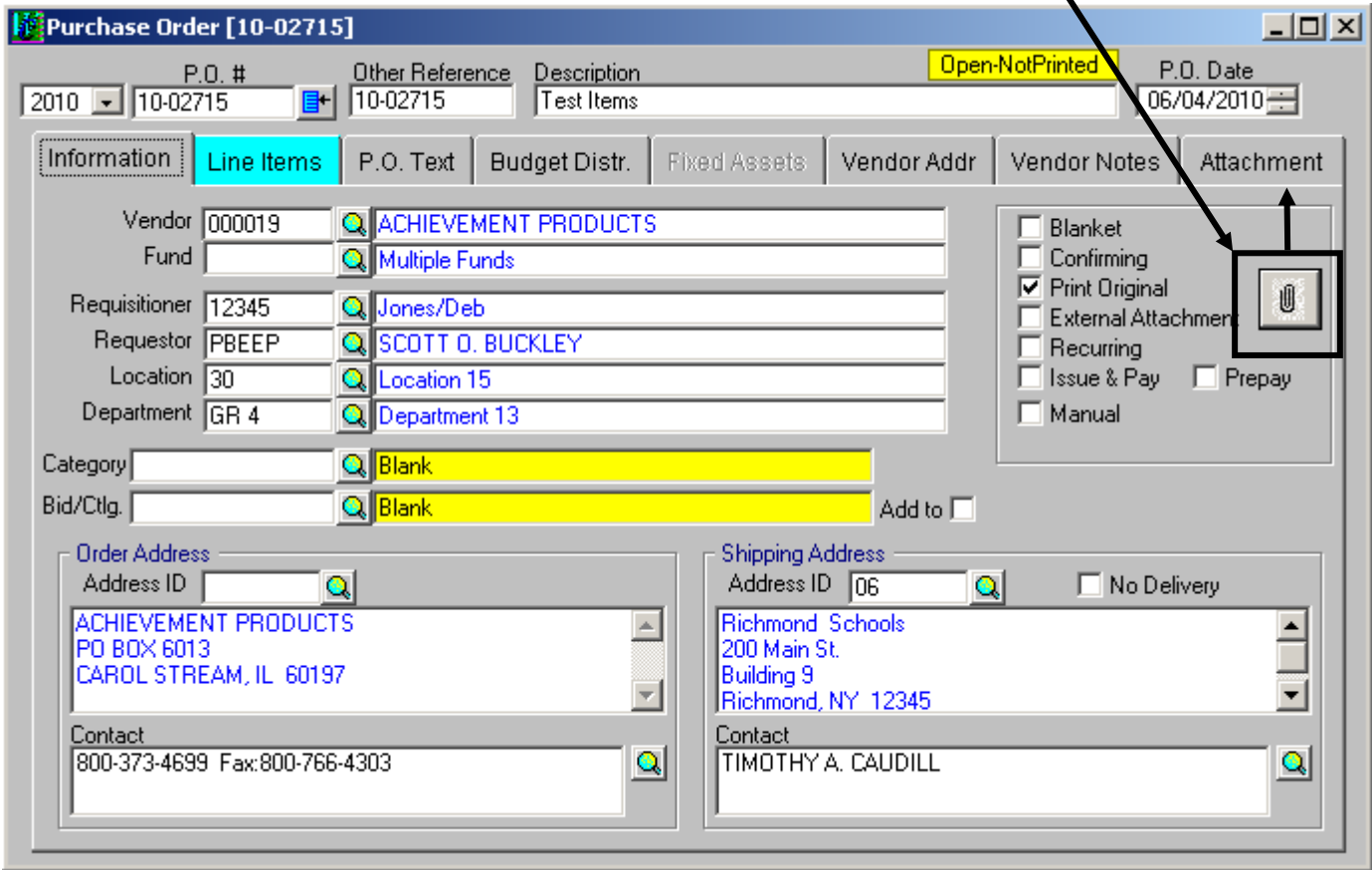
# Attachments to Purchase Requisitions

2013 Training Session

## PO Attachments

*WinCap* has the ability to attach documents to a requisition or to a PO. This is done from within PO Maintenance (Manage/Purchasing/ Purchase Order Maintenance). A user does not have to be in modify mode to manage the Attachment tab of PO Maintenance, but user security restrictions concerning modifying orders still apply.

If a user is in modify mode on the **Information tab** of the requisition or PO, clicking on the  icon will take the user to the **Attachment tab** of the document.



**Purchase Order [10-02715]** Open-NotPrinted P.O. Date: 06/04/2010

P.O. # 10-02715 | Other Reference 10-02715 | Description Test Items

Information | **Line Items** | P.O. Text | Budget Distr. | Fixed Assets | Vendor Addr | Vendor Notes | Attachment

Vendor: 000019 | ACHIEVEMENT PRODUCTS  
Fund: | Multiple Funds  
Requisitioner: 12345 | Jones/Deb  
Requestor: PBEEP | SCOTT O. BUCKLEY  
Location: 30 | Location 15  
Department: GR 4 | Department 13

Category: Blank  
Bid/Ctlg.: Blank

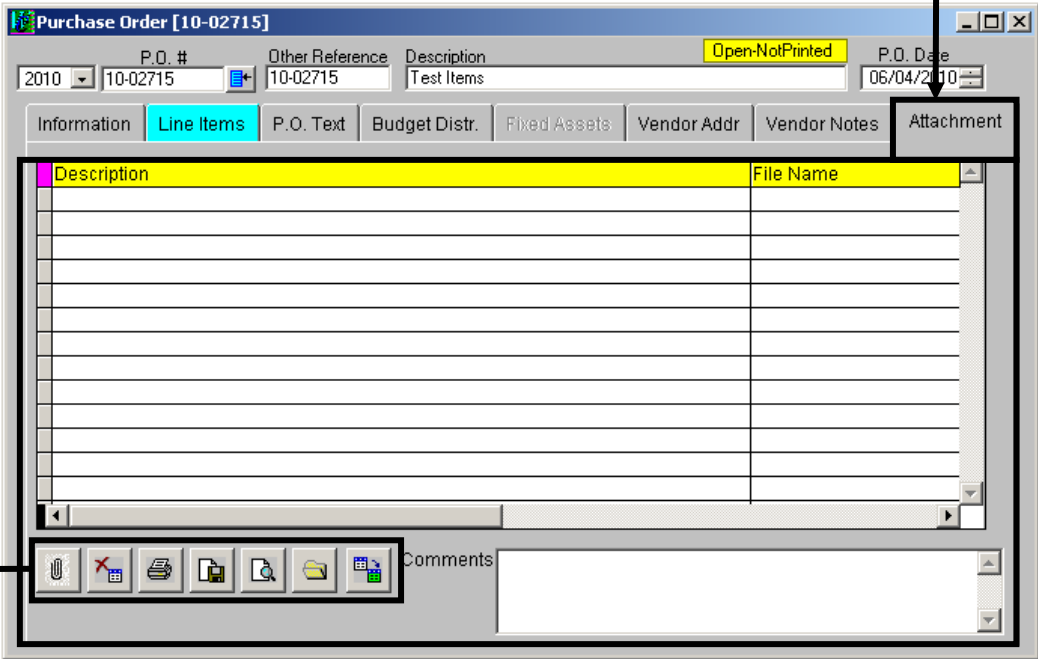
Order Address: ACHIEVEMENT PRODUCTS, PO BOX 6013, CAROL STREAM, IL 60197  
Contact: 800-373-4699 Fax: 800-766-4303

Shipping Address: 06, No Delivery  
Richmond Schools, 200 Main St, Building 9, Richmond, NY 12345  
Contact: TIMOTHY A. CAUDILL

Options:  Blanket,  Confirming,  Print Original,  External Attachment,  Recurring,  Issue & Pay,  Prepay,  Manual


# Explanation of the PO Attachment tab

The Attachment tab of the document is where all attachments are managed.



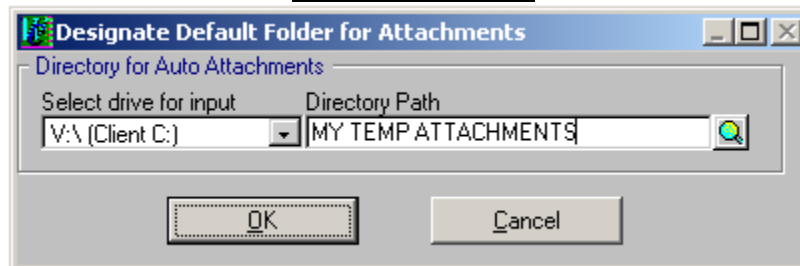
- Attach a File
- Delete the selected attachment
- Print the selected attachment to the default printer
- Export the selected attachment to a file
- Open the selected attachment in a separate form
- Open a local copy of the selected file
- Move attachment to PO vendor

## Default Drive and Directory for PO Attachments

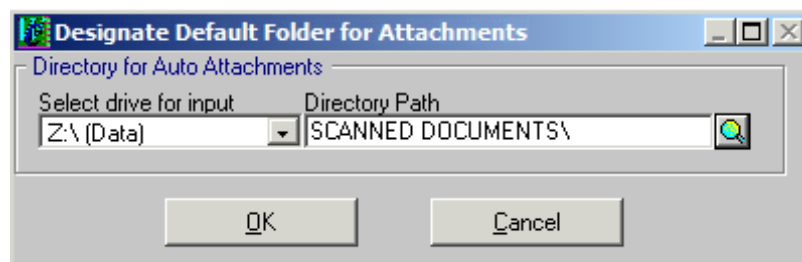
Each user may have their own pre-designated file folder (Drive and Directory) to which the system can default whenever they select the  option to attach a file on the Attachment tab of PO Maintenance. The concept is for each user to have their own “temporary” folder where newly scanned or saved documents can be placed, to help the user readily select those documents to attach to their current PO form, and to then automatically clear the contents of the folder.

To designate your own *WinCap* default attachments directory, select File/Administration/ Designate Default Folder for Attachments and specify the desired Drive and Directory location. If you are in a main campus and have a G drive, select the Z drive in WinCap. If you are in a remote campus and use a C drive, select the V drive in WinCap.

### Remote Buildings

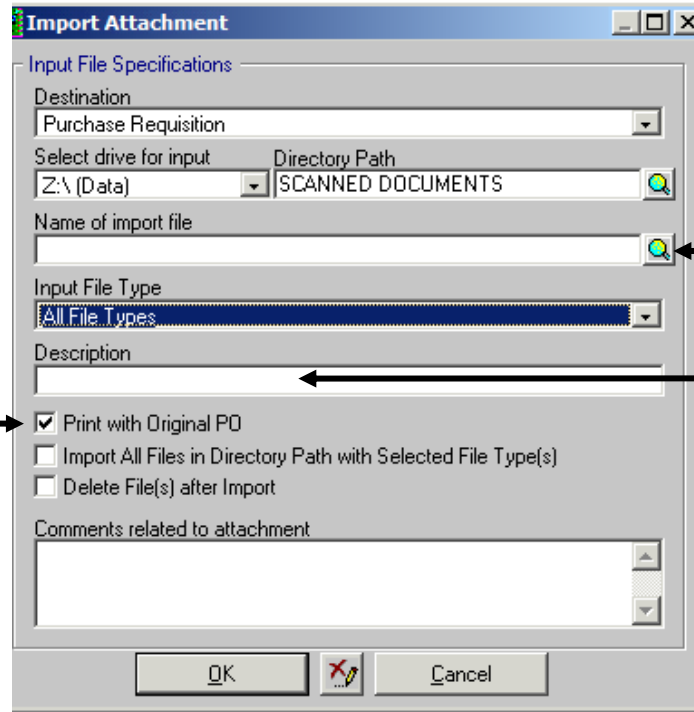


### Campuses



Whenever the dialog is initiated, it will now default to the particular user's designated default attachments folder (Drive and Directory), if they have one.

The option to indicate whether attachment(s) should 'Print with Original PO' when the user subsequently selects to 'print attachments' for a specific report (i.e. printing POs) will also be defaulted "on" for each new attachment request and can be selected "off" as necessary. When importing multiple attachments at one time, the selected designation will be applied for all of the attachments.



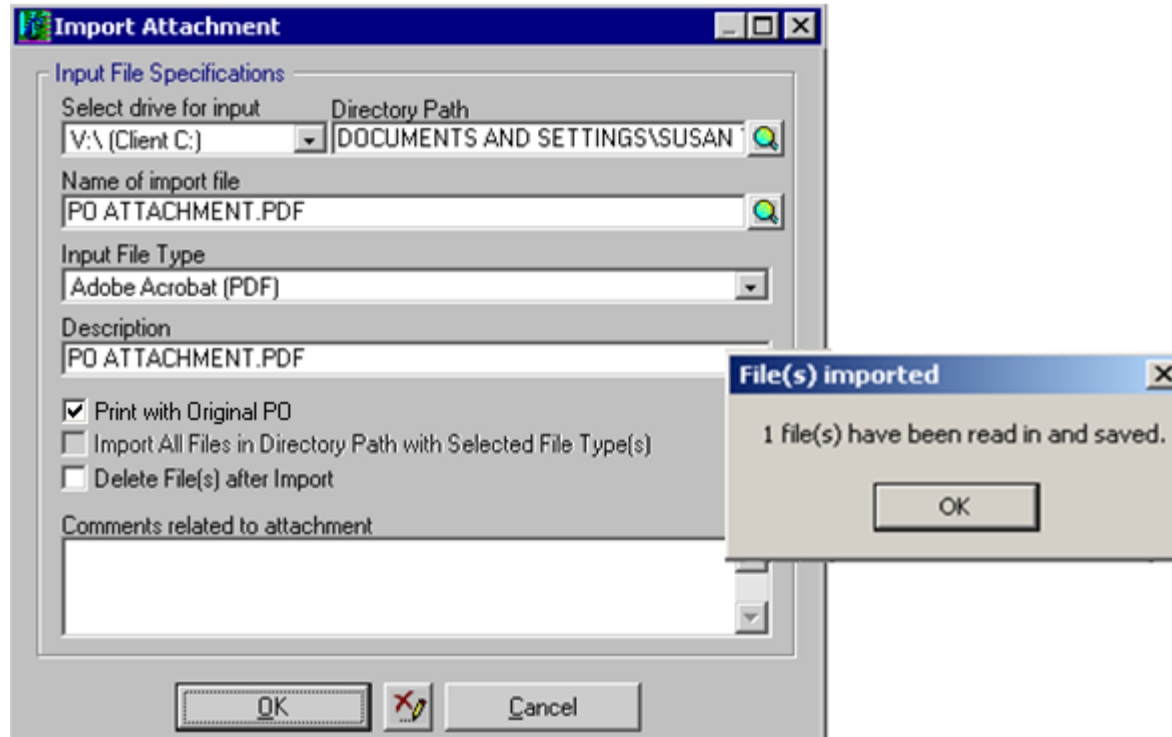
Click on the magnifying glass to find and select the file you want to attach. When you find the file click on it and then click on import.

The system will set the 'Description' to the corresponding file name if a description is not specified.

Users can then change specific information for individual attachments on the Attachments tab once these have been imported.

When the user designates a single specific file to import, the 'Input File Type' will automatically be set to the type for the file selected and the 'Import All Files in Directory Path with Selected File Type(s)' will be inactive (gray).

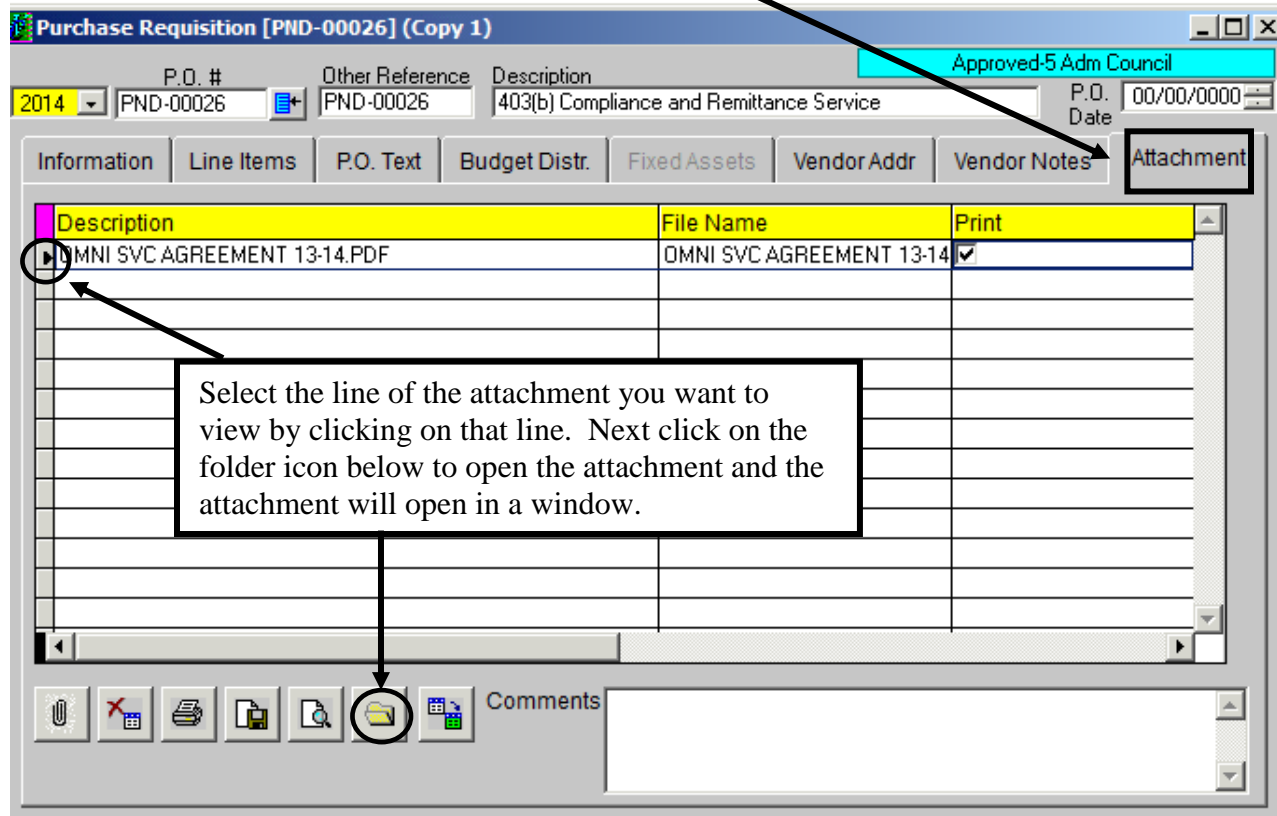
A confirming 'File(s) imported' dialog message will be displayed to verify if the attachment process has been completed successfully.



If all selected attachments cannot be imported as specified, then the system will import those that it can and then display a message in the dialog indicating the number that were imported successfully and listing the specific file names for those that could not, with a reason why each could not be imported (i.e. file is too large, unsupported file type, etc.).

## Reviewing the Purchase Requisition Attachments

Click on the attachment tab of the Purchase Requisition.



**NOTE: Please make sure to select the Folder Icon above as this is the quickest view option.**