

Carnegie Mellon University

Finance Division

Purchase Order Attachments Quick Guide

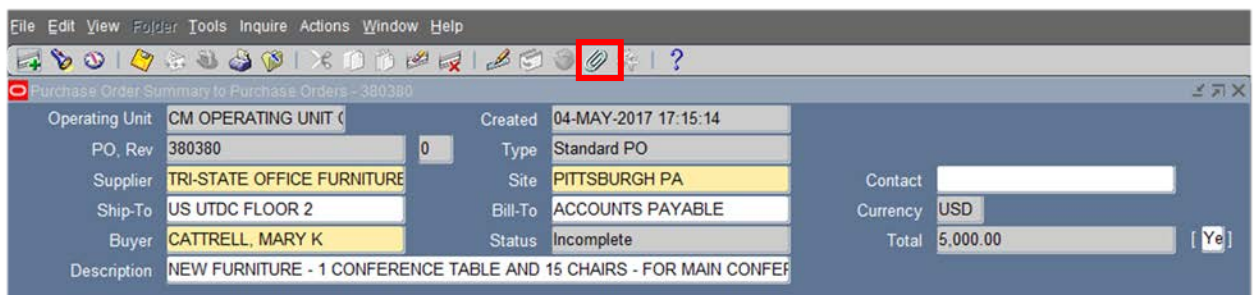
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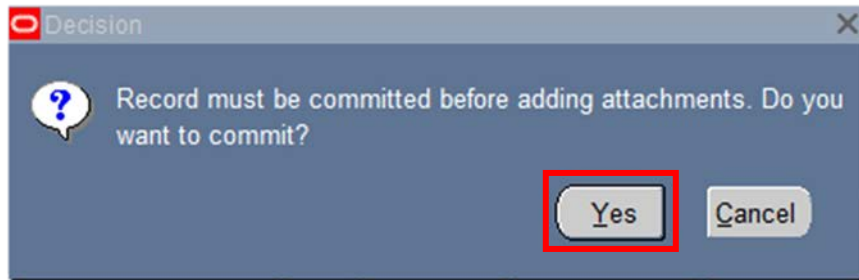
Attaching Bid Checklist Forms to POs in Oracle

Attaching the required Purchasing Checklist and Bid Summary Form (Bid Checklist) to purchase orders in Oracle eliminates the need for a separate submission to Procurement Services, allows approvers to view the attachment in their workflow notification to ensure the necessary steps have been completed prior to the purchase, and helps alleviate potential audit concerns with missing Bid Checklists. For information on when a Purchasing Checklist and Bid Summary Form is required, please refer to the [Procurement Manual](#) and/or [Buyer Actions Matrix](#).

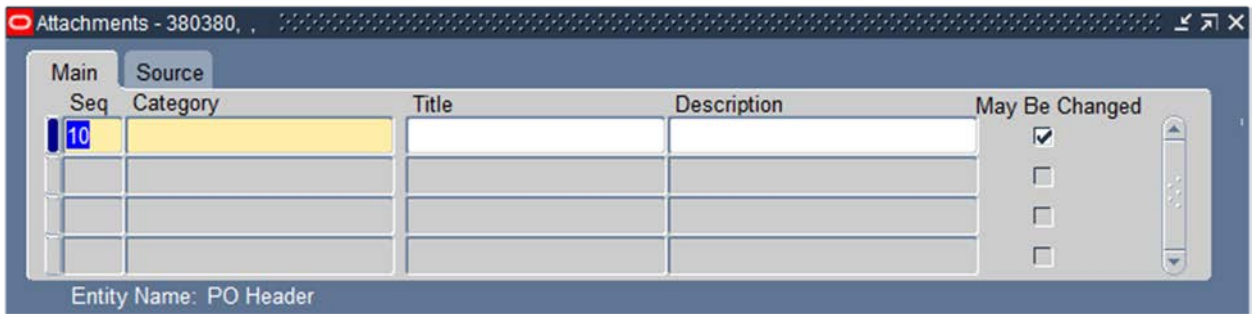
1. Go into your Oracle **POREQ Buyer and Approver** responsibility and then choose **Purchase Orders**.
2. Input the required data in the PO header fields and save your work. Purchase order attachments can only be added at the header level of a saved PO.
3. While in any field in the PO header section, click the **Attachments paper clip icon** in the toolbar.




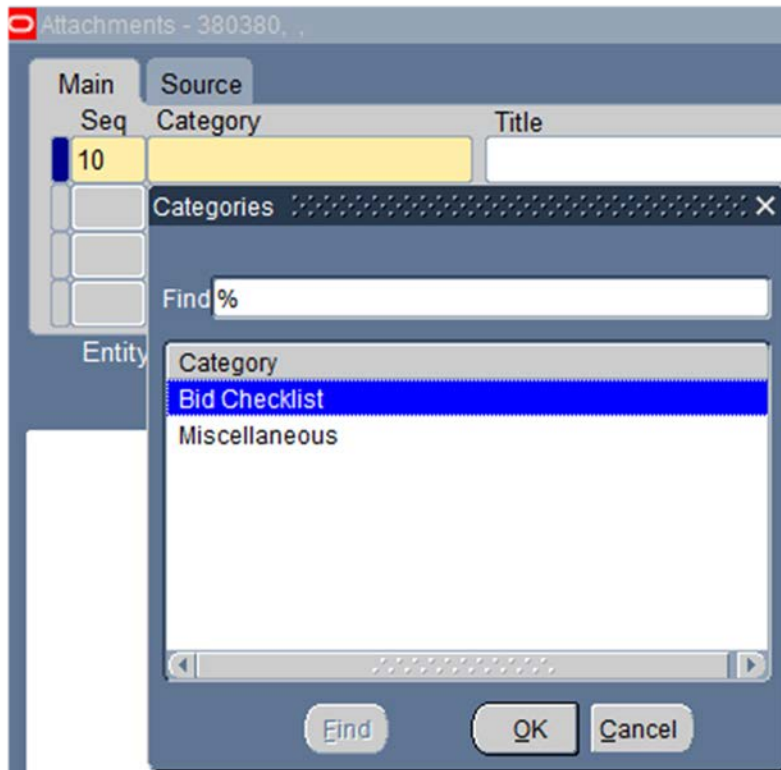
- a. **Note:** The PO must be saved before an attachment can be added. If the PO has not yet been saved, a decision box will open and ask if you want to commit (save) the record. Click **Yes**.



4. The Attachments form will open. This is where the Bid Checklist can be uploaded as an attachment on the PO.

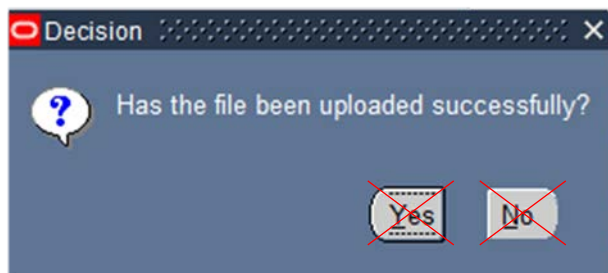
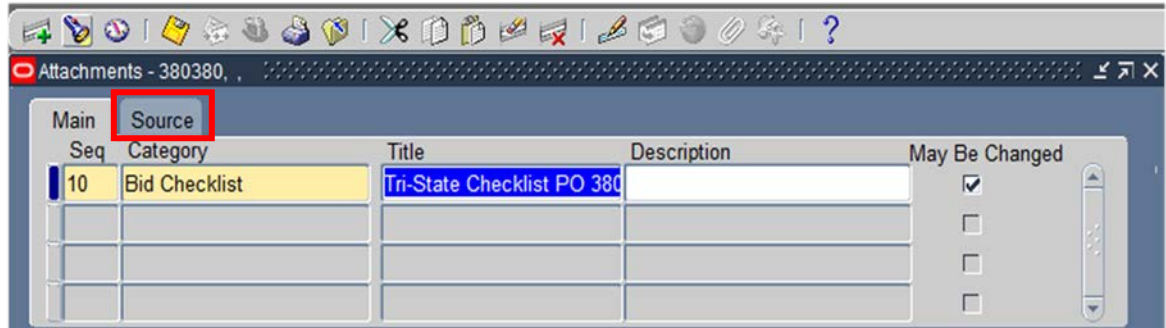


- a. Click on the **Category** field. To see the available Category values click the List of Values button  and enter the % wildcard. Select the **Bid Checklist** option.



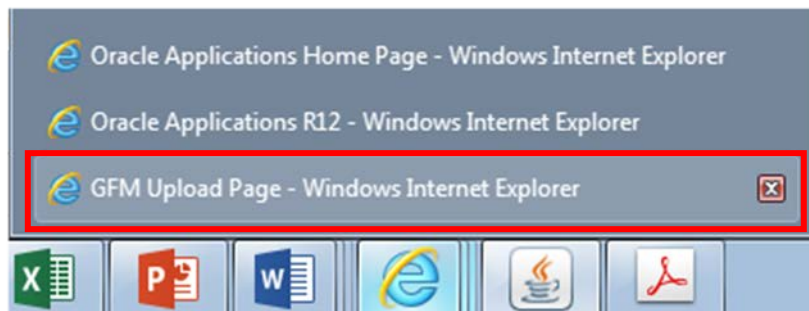
Note: The **Miscellaneous** option can be used for any other type of supporting documentation, such as any necessary gift processing forms, documented quotes, etc.

- b. The **Title** and **Description** fields are both optional. The title is what the approver(s) will see in the workflow notifications as the link to the attachment. If a title is not entered, the file name or URL will show as the document name. The description could be used to provide a brief description of the attachment.
- c. Go to the **Source** tab. A Decision Box will pop up asking if the file has been uploaded successfully. **Do not click on either Yes or No yet.**

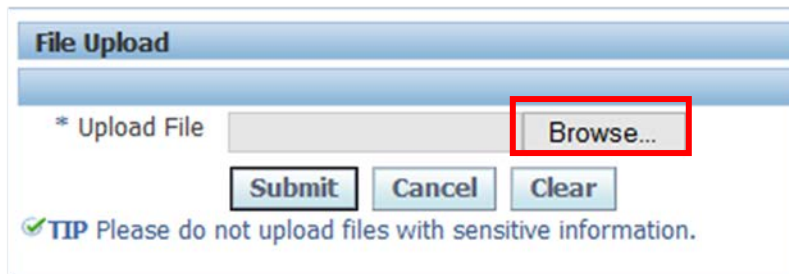


- i. The Bid Checklist category defaults to a **Data Type of File** and automatically opens a browser window/tab to allow you to browse for and submit an attachment.

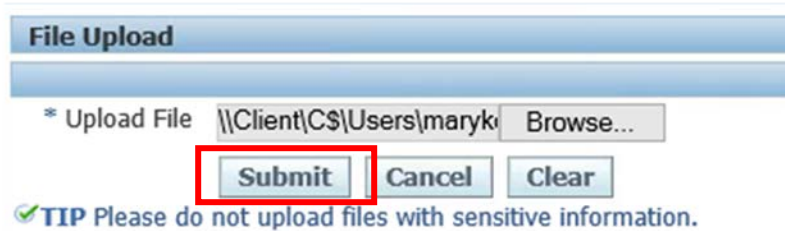
Note: this window often opens *behind* the Oracle application. Locate the internet browser window titled **GFM Upload Page**. (If using Citrix, hover over the Internet Explorer icon and locate the correct page.)



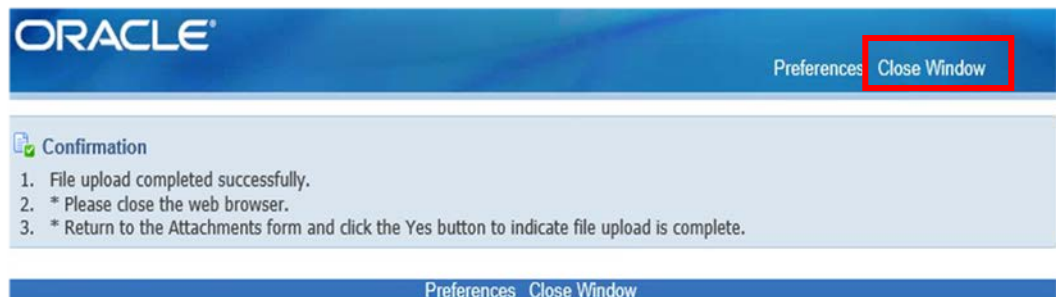
- d. On the GFM Upload Page, click the **Browse** button to search for the file to submit (upload).



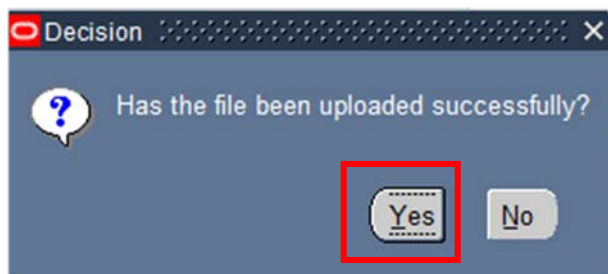
- i. Select the file from your computer to upload and click **Submit**. Do not upload files with sensitive or personally identifiable information like social security numbers. Attachments can be any type of file (pdf, Excel, Word, text, etc.) of 7Mb or less.



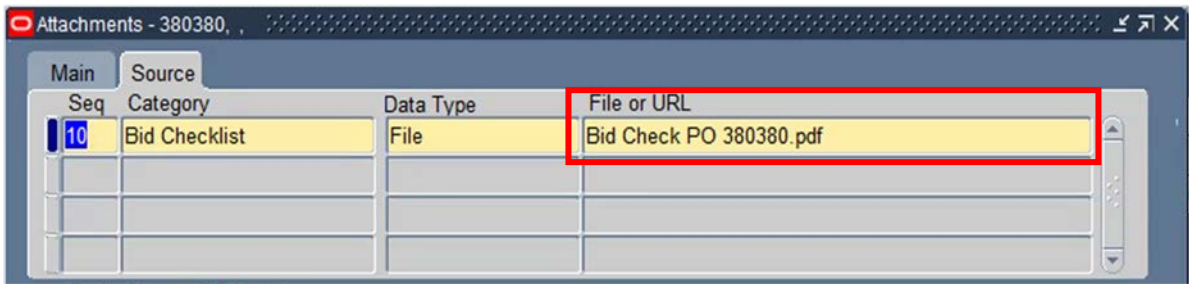
- ii. After receiving confirmation the file was successfully uploaded, click the **Close Window** link.



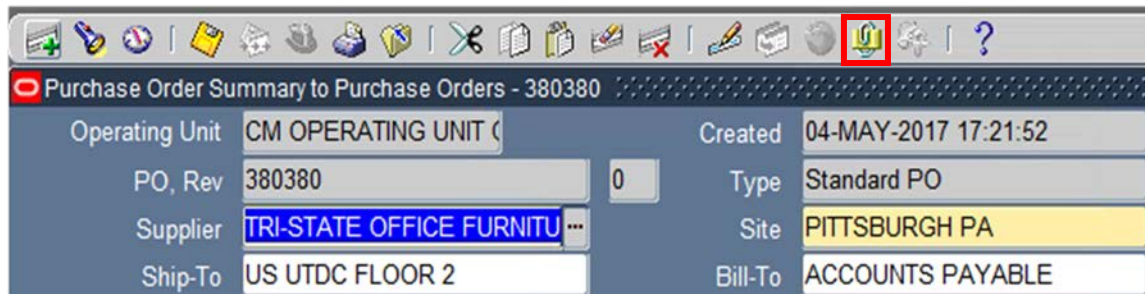
- e. This will take you back to the Oracle Attachments form with the Decision box asking if the file has uploaded successfully. Click **Yes** (if applicable).



- f. The file name will appear in the **File or URL** field.



- g. If you are finished adding attachments, close the Attachments window by clicking on the **X** in the upper right corner of the form. This will take you back to the Purchase Order screen.
 - i. If you wish to add additional attachments, see the '**Attaching Miscellaneous Documentation to POs in Oracle**' section of this quick guide.
- h. To confirm that the Bid Checklist attachment was successfully added, click any field in the PO header and confirm that the paperclip icon now has a piece of paper in it.

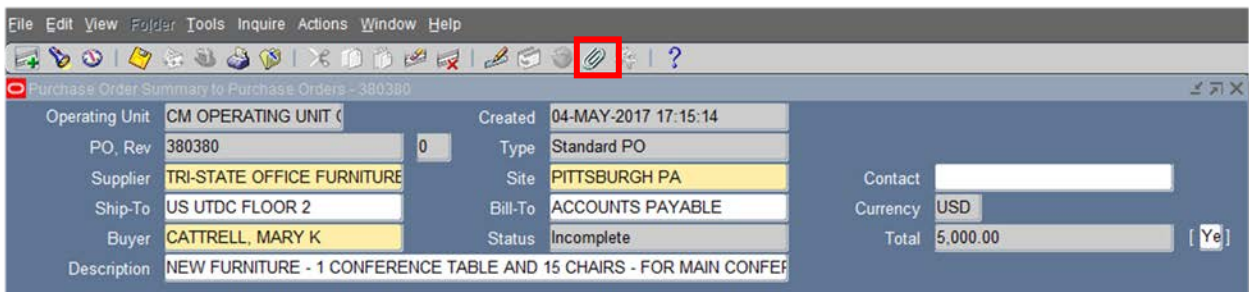


- i. Complete the Purchase Order and submit for approval as usual.

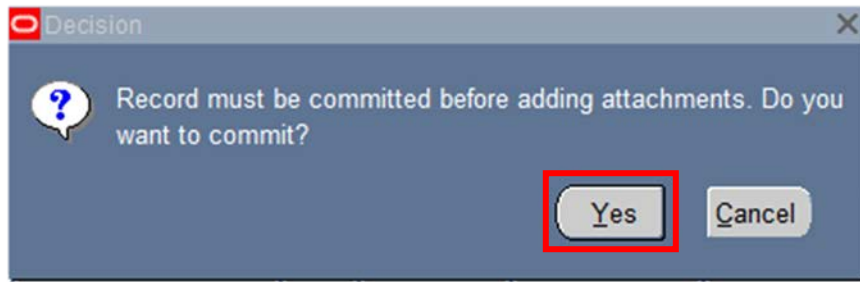
Attaching Miscellaneous Documentation to POs in Oracle

Attachments other than the required Purchasing Checklist and Bid Summary form (such as any necessary gift forms, documentation of quotes, etc.) can be attached to a PO in Oracle by using the **Miscellaneous** attachment category. It is important to note that these attachments can be viewed by anyone with access to the purchase order module, so items such as contracts and/or agreements should not be attached but should be retained and provided to approvers separately.

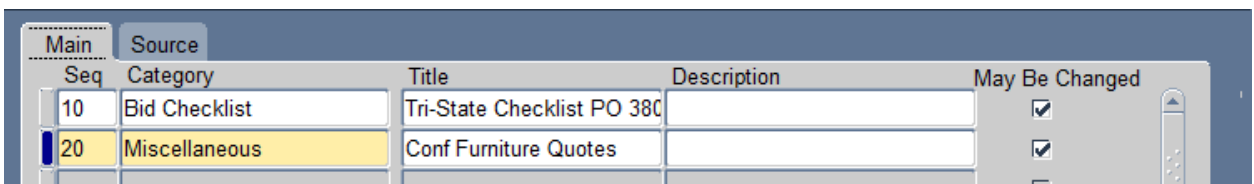
1. Go into your Oracle **POREQ Buyer and Approver** responsibility and then choose **Purchase Orders**.
2. Input the required data in the PO header fields and save your work. Purchase order attachments can only be added at the header level of a saved PO.
3. While in any field in the PO header section, click the **Attachments paper clip icon** in the toolbar.



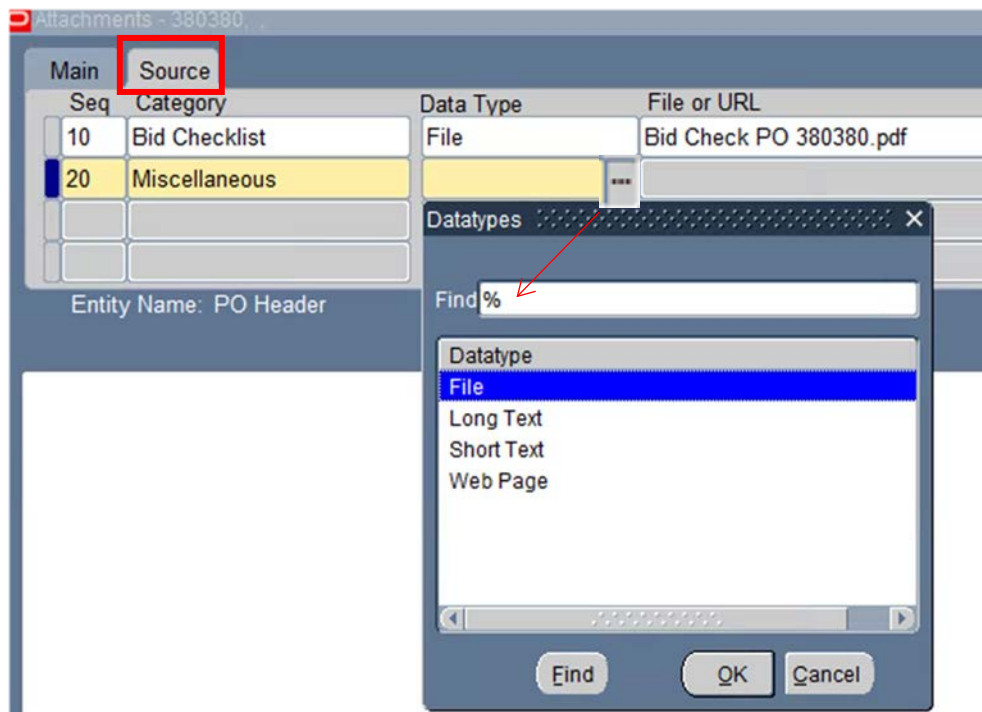
- a. **Note:** The PO must be saved before an attachment can be added. If the PO has not yet been saved, a decision box will open and ask if you want to commit (save) the record. Click **Yes**.



- 4. The Attachments form will open. This is where the miscellaneous documentation can be uploaded as an attachment on the PO.
 - a. Click into the Category field and select **Miscellaneous**. If desired, enter an optional Title and/or Description for your attachment.



- b. Go to the Source tab. The Data Type does not default to File as is does with the Bid Checklist category. Click on the list of values icon to see this list of available Data Types.



- c. The preferred Data Type at CMU is **File**. The other Data Types available are:
 - i. Long Text / Short Text - The Long Text option allows for up to 32,000 characters in the text box. The Short Text option allows you to enter up to 4,000 characters in the text box. The only reason you should use either of these fields is if you need to provide backup that contains sensitive information (social security numbers, salary data, etc.) or that your business manager deems confidential to the department and you don't want to attach the document to the journal in Oracle. Use this data type to reference the location of the file on the shared drive. It is important to make sure your approver(s) have access to the location you reference in order to review the backup.
 - ii. Web Page - You would use this option if the information that you want to include as documentation is located on a webpage. Choosing this option allows you to add a URL in the file or URL field.
 - 1. **Note:** When working in Oracle within the Citrix (virtualized) environment, approvers will not be able to click on a URL in their notification and get to a web page. Access to the web is restricted in Citrix.
- d. Follow steps 2c - 2h from the "Attaching Bid Checklists to POs in Oracle" section above to attach the miscellaneous document(s).
- e. The file name will appear in the **File or URL** field.

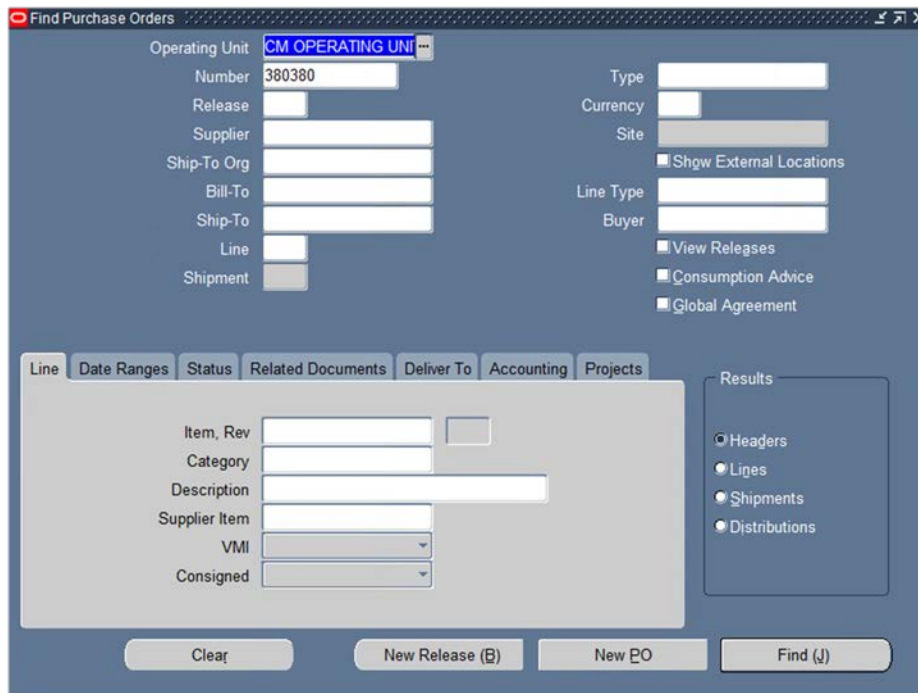
Seq	Category	Data Type	File or URL
10	Bid Checklist	File	Bid Check PO 380380.pdf
20	Miscellaneous	File	Conference Room update quotes.pdf

- f. If you are finished adding attachments, close the Attachments window by clicking on the X in the upper right corner of the form. This will take you back to the Purchase Order screen.
- g. To confirm that the Bid Checklist attachment was successfully added, click any field in the PO header and confirm that the paperclip icon now has a piece of paper in it.
- h. Complete the Purchase Order and submit for approval as usual.

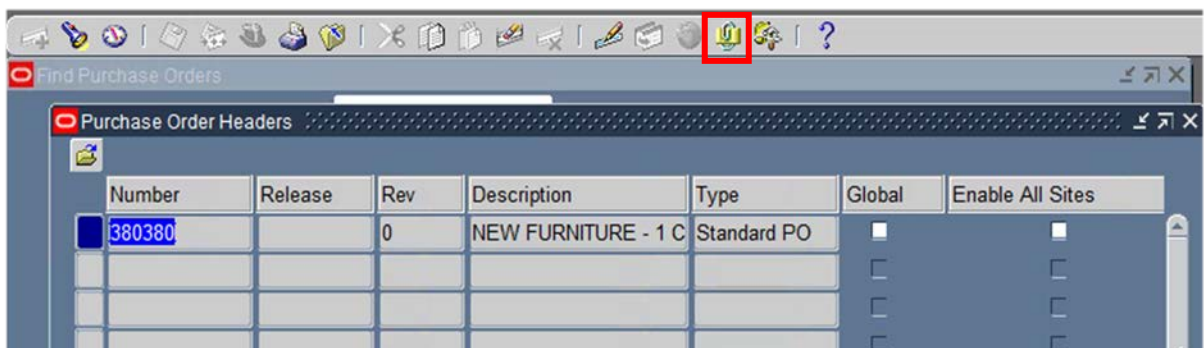
Viewing Purchase Order Attachments in PO Summary Search Results

PO Attachments can be viewed, but not modified or deleted, from the PO Summary Search results, regardless of approval status. To view PO attachments in Oracle follow the steps below:

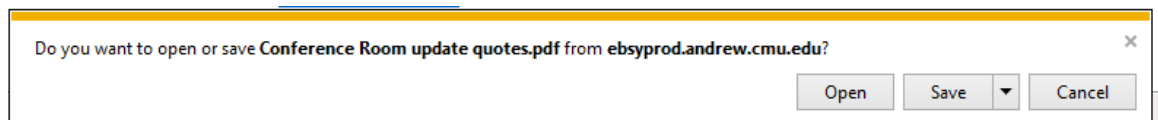
1. Go into your **Oracle POREQ Buyer and Approver** or **REQ Requisitioner and Approver** responsibility and then choose **Purchase Orders>Purchase Order Summary**.
2. Search for the PO in the Purchase Order Summary window. In the Results box, select Headers and click **Find**.



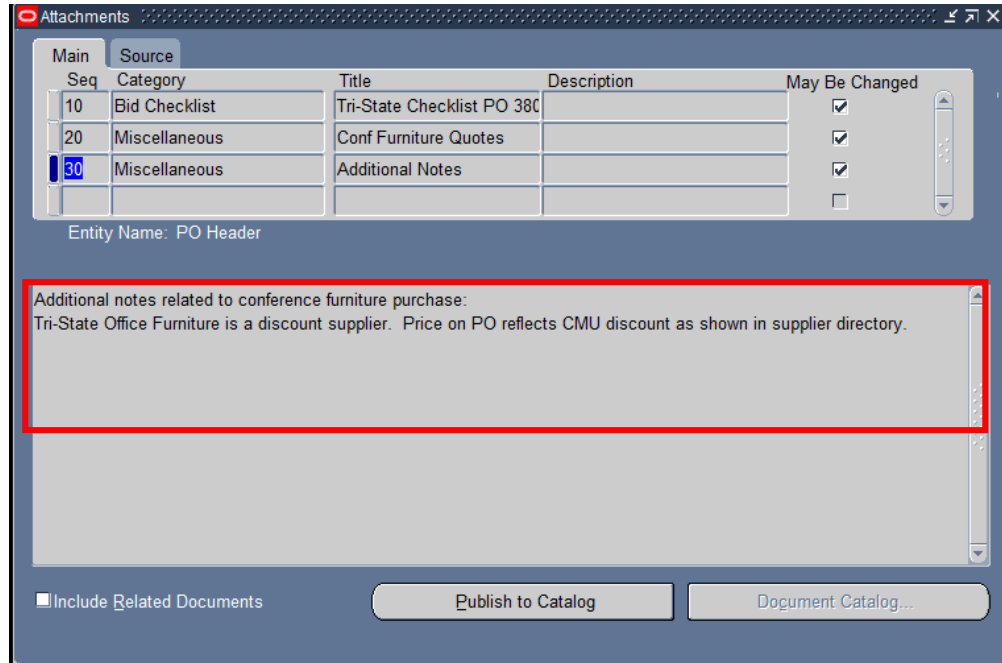
3. The search results will populate showing the PO Header information. The attachments can be opened from this screen by clicking on the paperclip icon, which will include the piece of paper indicating an attachment.



- a. This will show the attachments associated with this PO. Select the attachment line you wish to view.
- b. If the attachment is a file, click the **Open Document** button to view the attachment.
 - i. NOTE: You may get a security prompt when opening the document. Select the **Open** option (This could vary based on the internet browser in use)



- c. If the short or long text Data Type option had been used instead of attaching a file, the text will show in the box below the list of attachments.

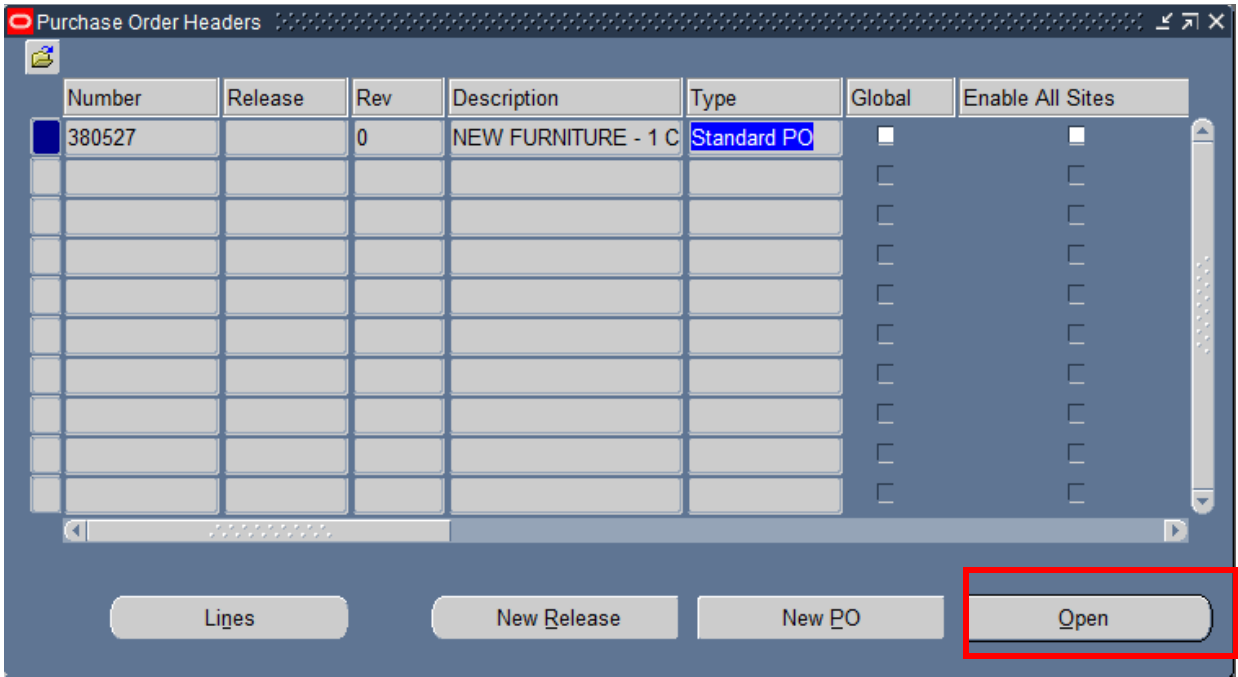


Viewing Purchase Order Attachments in the PO

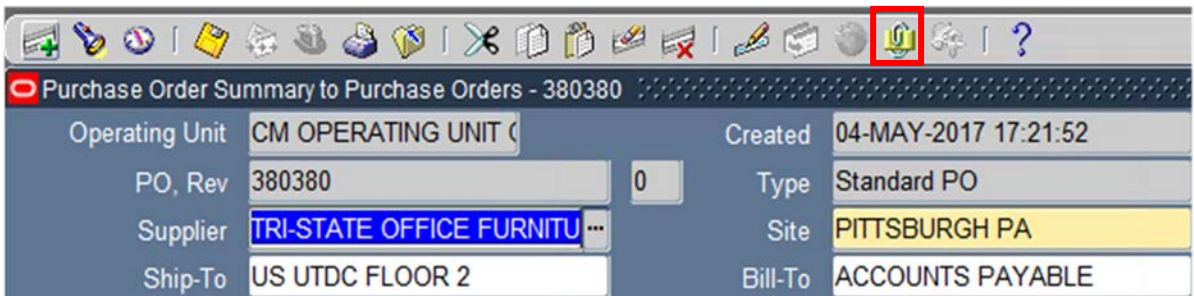
Attachments can also be viewed on purchase orders by opening the purchase order in the **POREQ Buyer and Approver Responsibility**.

Note: If the purchase order is in an approver's queue or checkpoint awaiting action, the purchase order cannot be opened. To view attachments on a purchase order that is in the approval process, follow the steps in the [Viewing Purchase Order Attachments in PO Summary Search Results](#) section above.

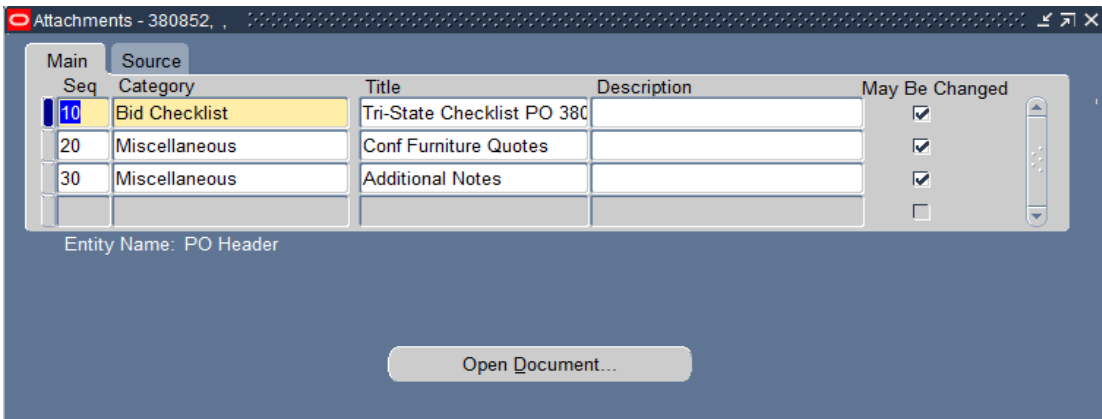
1. Go into your **Oracle POREQ Buyer and Approver** or **REQ Requisitioner and Approver** responsibility and then choose **Purchase Orders>Purchase Order Summary**.
2. Search for the PO in the Purchase Order Summary window. In the Results box, select Headers and click **Find**.
3. From the PO Summary search results, click **Open** to view the purchase order.



4. Click on the Attachments paperclip icon to view the attachments.



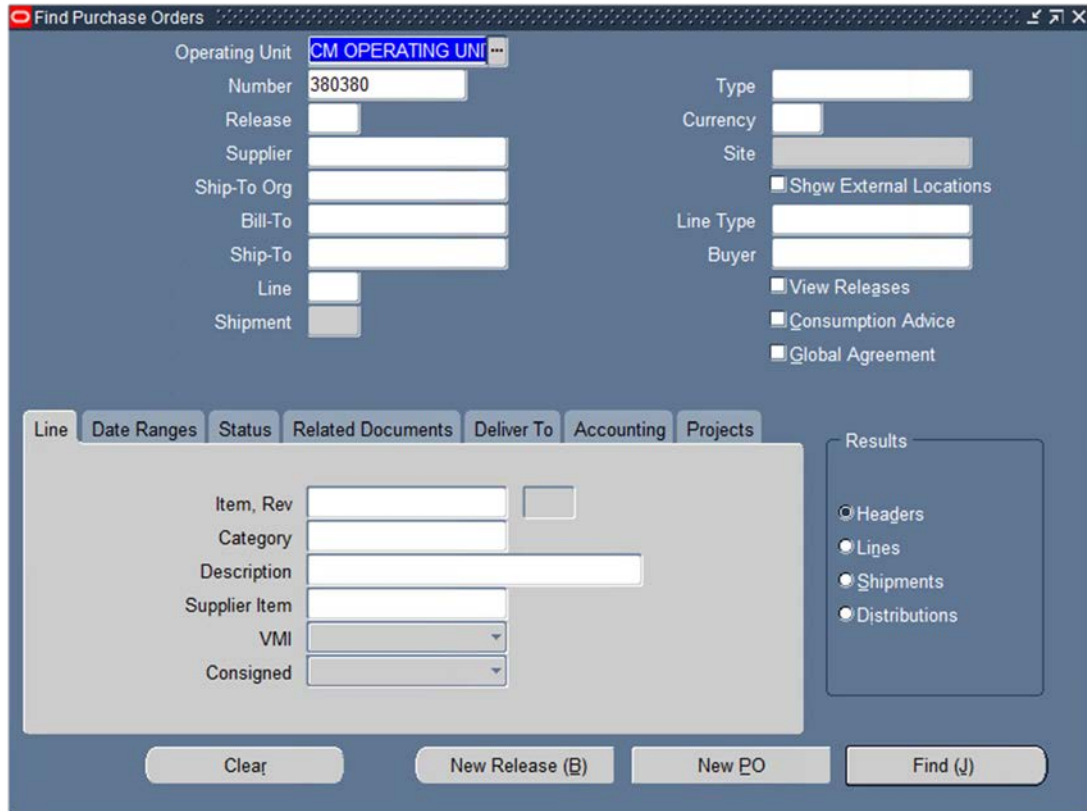
a. The attachments can be reviewed here. This window will also allow attachments to be modified or deleted. Instructions for doing so are in the next section, [Deleting/Updating PO Attachments](#).



Deleting/Updating PO Attachments

Attachments can be deleted or updated on approved POs in Oracle. POs will not need to be resubmitted for approval if attachments are updated or deleted.

1. Go into your **Oracle POREQ Buyer and Approver** responsibility and then choose **Purchase Orders>Purchase Order Summary**.
2. Search for the PO in the Purchase Order Summary window. In the Results box, select Headers and click **Find**.



The screenshot shows the 'Find Purchase Orders' window with the following details:

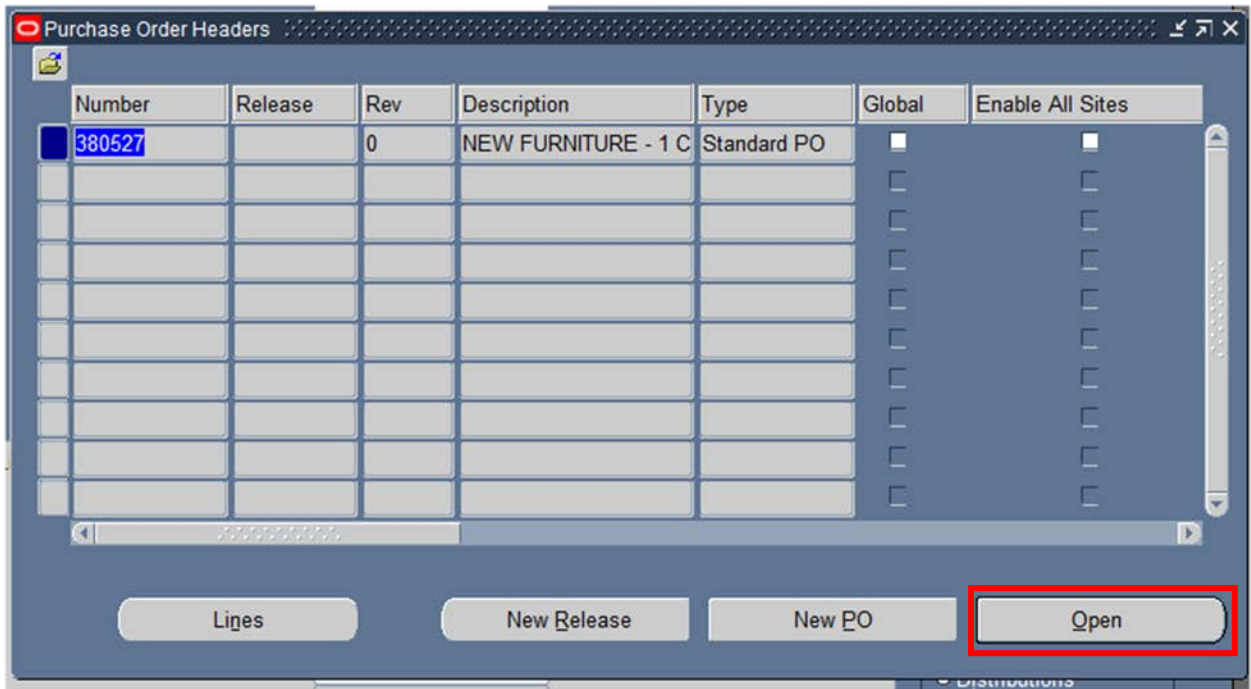
- Operating Unit:** CM OPERATING UNI
- Number:** 380380
- Release:** [Empty]
- Supplier:** [Empty]
- Ship-To Org:** [Empty]
- Bill-To:** [Empty]
- Ship-To:** [Empty]
- Line:** [Empty]
- Shipment:** [Empty]
- Type:** [Empty]
- Currency:** [Empty]
- Site:** [Empty]
- Show External Locations
- Line Type:** [Empty]
- Buyer:** [Empty]
- View Releases
- Consumption Advice
- Global Agreement


The 'Results' section on the right has the following options:

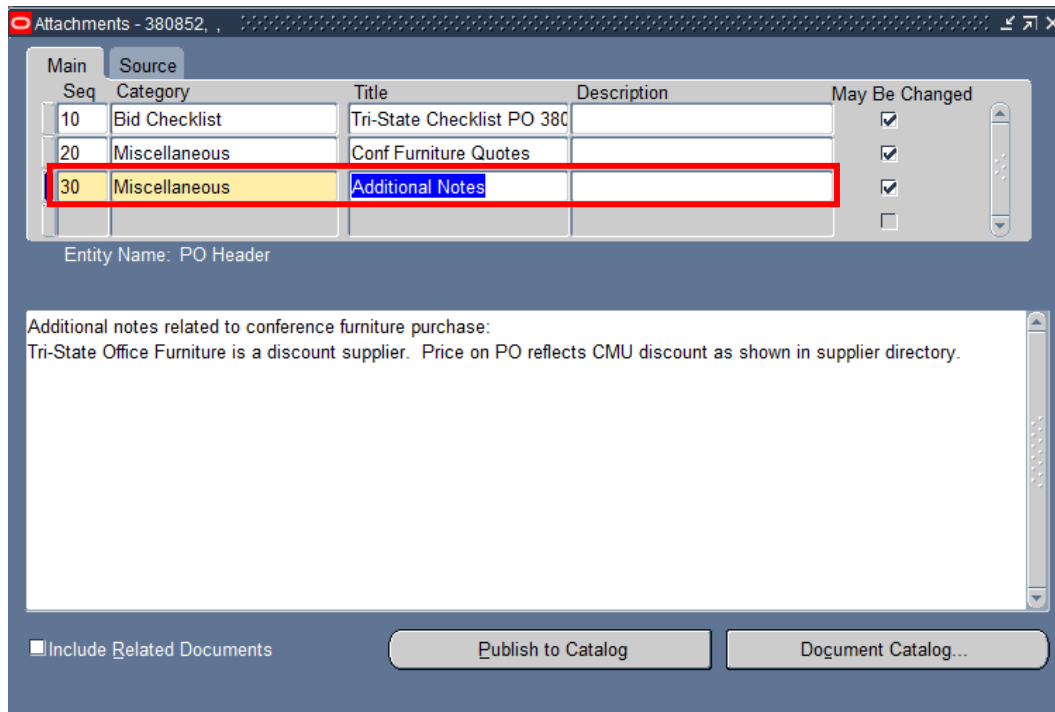
- Headers
- Lines
- Shipments
- Distributions

At the bottom, there are buttons for 'Clear', 'New Release (B)', 'New PO', and 'Find (J)'.

3. Select **Open** to open the purchase order.

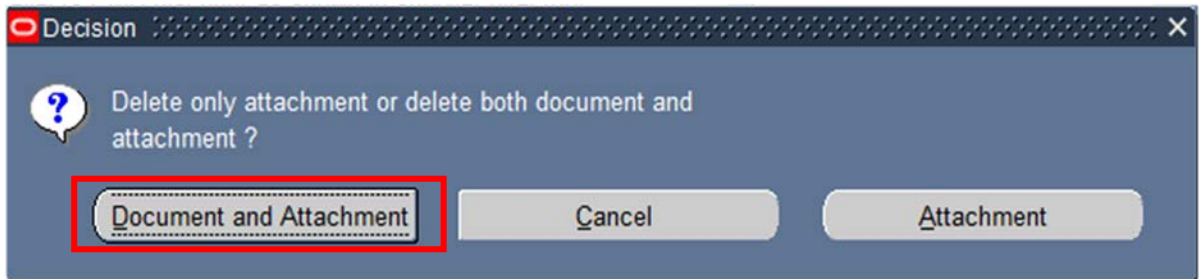


4. Click the attachments icon  in the toolbar to view all attachments to this purchase order.
5. Once the attachments window opens, select the line with the attachment that you want to delete. The blue indicator on the left will show which line is currently selected. The system-required fields will also turn yellow.



6. Click the delete record icon  in the toolbar to delete the attachment.

- In the Decision box, select **Document and Attachment** to completely remove the attachment from the system.



- If the attachment was deleted so that an updated or corrected attachment can be added, follow the steps in the section titled [Attaching Bid Checklists to POs in Oracle](#) above to attach a new document.

PO Approval: Viewing Purchase Order Attachments from Work List Notifications

Approvers can view Purchase Order attachments from Work List notifications, whether or not they have access to the Purchasing module within Oracle.

Note: Purchase Orders that are awaiting approval cannot be opened. Approvers must open documents from the Worklist notification or, if an approver has the POREQ Buyer and Approver Responsibility or the REQ Requisitioner and Approver responsibility, they can follow the steps in the [Viewing Purchase Order Attachments in PO Summary Search Results](#) section above.

- From the Oracle homepage, open the workflow notification to review.

Worklist				
From	Type	Subject	Sent	Due
CATTRELL, MARY	CMU PO Approval	Standard Purchase Order 380380 for USD 6,650.00 requires your approval.	04-May-2017	

- In the PO approval window that an approver sees upon opening a worklist notification, any attached document names will be listed as links next to the heading Attachments. Click on the attachment link to open.

Oracle Applications Home Page >
 Standard Purchase Order 380852 for USD 6,650.00 requires your approval.

From: CATTRELL, MARY
 To: PERKINS, AMANDA
 Sent: 12-May-2017 13:49:00
 ID: 7305865

Preparer Name: CATTRELL, MARY
 Supplier Name: TRI-STATE OFFICE FURNITURE INC
 Supplier Location: PITTSBURGH PA
 Description: NEW FURNITURE - 1 CONFERENCE TABLE AND 15 CHAIRS - FOR MAIN CONFERENCE ROOM IN STE 414

Attachments: [Tri-State Checklist PO 380380, Conf Furniture Quotes](#)

LN.SHP.DST	Item Number	Rev.	Item Description	UOM	Quantity	Unit Price	Line Amount	Account
1.1.1			14FT RACETRACK VENEER CONFERENCE TABLE WITH HALF DRUM BASE IN A LIGHT CHERRY FINISH	EACH	1	5,000.00	5,000.00	87200.000001.520.000.540900.01
2.1.1			MESH BACK TASK CHAIR WITH MID-BACK IN BLACK MESH	EACH	15	110.00	1,650.00	86200.000001.520.000.540900.01

Attachments: [Tri-State Checklist PO 380380](#), [Conf Furniture Quotes](#)

Note: When clicking to open to attachment, an approver may see a message asking if he or she wishes to open the attachment. Click Open on the prompt.

Do you want to open or save **Bid Check PO 380380.pdf** (1.59 MB) from **ebsyprod.andrew.cmu.edu**?

- The attachment will open and an approver can review the Bid Checklist and/or Miscellaneous supporting documentation to ensure that all requirements have been met before approving the purchase order.

Standard Purchase Order 380380 for USD 6,650.00 requires your approval.

From: CATTRELL, MARY
 To: PERKINS, AMANDA
 Sent: 04-May-2017 22:31:21
 ID: 7292009

Preparer Name: CATTRELL, MARY
 Supplier Name: TRI-STATE OFFICE FURNITURE INC
 Supplier Location: PITTSBURGH PA
 Description: NEW FURNITURE - 1 CONFERENCE TABLE AND 15 CHAIRS - FOR MAIN CONFERENCE ROOM IN STE 414

Bid Check PO 380380.pdf - Adobe Reader

Please fill out the following form. You cannot save data typed into this form. Please print your completed form if you would like a copy for your records.

Carnegie Mellon University
Finance Division
Purchasing Checklist and Bid Summary Form
 Page 1 of 2

Purpose of this form: To comply with University Purchasing Policy, OMB Circular A-110 and Federal Acquisition Regulations (FAR), completion of this Purchasing Checklist and Bid Summary Form is required for all Purchasing Card and Purchase Orders (POs) transactions of \$5,000 USD or greater using university or non-federal sponsored funds, \$2,500 USD for general items/services and \$2,000 USD for federally funded construction or construction-related items with non-Preferred Suppliers, purchases of \$50,000 USD or greater for federally funded construction or construction-related items with Preferred Suppliers and all purchases above \$100,000 regardless of the source of funds or type of supplier utilized (Federally funded acquisitions ≥ \$2,500 USD with non-Preferred Suppliers must be done on an Oracle PO).

Note: This form must be emailed to Procurement Services at procurement-inbox@andrew.cmu.edu with all supporting documentation upon completion of a PO or when the Purchasing Card verification report is submitted. This form must also be scanned and attached to the Purchasing Card verification report (PRC). Failure to submit/attach the form will cause a non-compliance memo and/or violation points to be issued and all/or associated paperwork will be returned to the user for reprocessing.

[Click here for instructions on completing this form.](#)

Federal Government Funds? Yes No Purchase Order Number (or type "PCARD"): 380380
 Other sponsored funds? Yes No Date: May 4, 2017
 Describe the goods and/or services being procured:

- The approver can then take the appropriate action on the request from this window.