#### Adding an Attachment to a Vendor Created on 2/21/2013 7:25:00 AM

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## Adding an Attachment to a Vendor

### Core-

Core-CT enables users to add attachments to a vendor record using the **Attachments (0)** link on the **Identifying Information** page of the **Vendor** component. Multiple attachments can be added to a vendor record. Most common file types can be attached, e.g., Word documents, Excel files, pdfs, text files, and graphics (i.e., jpeg files).

In this example a user attaches a pdf file to a vendor record.

#### Procedure

Navigation: Vendors > Vendor Information > Add/Update > Vendor

ORACLE	Home   Worklist    AdditoFavorites   Sinoput
Favorites Main Menu > Vendors > Vendor Information > Add/Update > Vendor	
	🛃 New Window 🕜 Help 🖷 http
Vendor Information	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value Add a New Value	
✓ Search Criteria	
SetID:	
Persistence: = V	
Short Vendor Name: begins with 🗸	
Our Customer Number: begins with v	
Name 1: Degins with 🗸	
Include History Correct History Case Sensitive	
Search Clear Basic Search E Save Search Criteria	
Find an Existing Value Add a New Value	

Step	Action			
1.	SetID is a required field.			
	Enter <b>STATE</b> into the <b>SetID</b> field.			
2.	Enter 000000001 into the Vendor ID field.			
3.	Click the Search button.			

ORACLE							
Foundation - Main Manua	Mandace , Mandac Tafarmatian , Add	lladata		Home	Worklist	Add to Favorites	Sign out
Pavonces Man Menu >	vendors > vendor information > Add,	opuace > venuor					-
Summary Identifying	Information Address Contacts	ocation Custom	Related Content	也 New Window	() Help	Personalize Page	💷 http
Communy <u>Identitying</u>		ocation Castom				-	
SetID:	STATE						
Vendor ID:	000000001						
Vendor Short Name: Vendor Name:	066009786G 066009786G-001 TOWN OF ANDOVER						
Order:	066009786G-001	Remit To:	066009786G-00	01			
	17 SCHOOL ROAD		17 SCHOOL RC	DAD			
	ANDOVER, CT 06232		ANDOVER, CT	06232			
Status:	Unapproved	Last Modified By:	COREReynolds	Dave			
Persistence:	Regular	Last modified date:	10/30/2012 9:4	2AM			
Classification:	Outside Party	Created By:					
HCM Class:		Created Date/time:	01/01/1900 12:0	MAOO			
Open for Ordering:	Yes	Last Activity Date:	10/30/2012				
Withholding:	No						
🔚 Save 🔯 Return to	Search 🔄 Notify	📑 Add	Update/Display	Include History	Dig Cor	rect History	
Summary   Identifying Info	rmation   Address   Contacts   Location   Cust	om					

Step	Action
4.	Click the <b>Identifying Information</b> tab.
	Identifying Information

Home   Worklist	
Favorites Main Menu > Vendors > Vendor Information > Add/Update > Vendor	
💌 Related Content 🛃 New Window 🔇 Help	🗹 Personalize Page 🛛 🖬 http
Summary Identifying Information Address Contacts Location Custom	
SetID: STATE *Vendor Name 1: TOWN OF ANDOVER	
Vender ID: 000000001 Vender Name 2: TOWN TREASURER	
Worder Short Name: 066009786G 066009786G-001 Withholding	Non-profit V
Vendor anor manie.	45301
*Classification:	W-9 Code: 40001
HCM Class:	Never
*Persistence:	
*Vendor Status: (Hackmann (0)	
Expand A	All Collapse All
Vendor Relationships	
Corporate Vendor InterUnit Vendor	
Corporate SetID: STATE InterUnit Vendor ID:	
Corporate Vendor ID: 0000000001 TOWN OF ANDOVER	
Create Bill-To Customer	
Create Bill To Customer	
Additional ID Numbers	
Duplicate Invoice Settings	
Government Classifications	
► Standard Industry Codes	
Additional Reporting Elements	
> Comments	
Evand All Callacae All	
Expand An Collapse An	
🔚 Save 🛛 🕅 Return to Search 🛛 🔚 Notify	le History 📝 Correct History
Summary   Identifying Information   Address   Contacts   Location   Custom	

Step	Action
5.	Currently there are no files attached to this vendor. The value enclosed within the parentheses (0) indicates the number of attachments associated with the vendor.
	Click the Attachments (0) link. Attachments (0)

OBACI	E					
				Home   Worklist	Add to Favorites	Sign out
Favorites Mai	n Menu > Vendors > Vendor Information >	Add/Update > Ve	endor			@
						Help
Vendor Atta	chment					
SetID:	STATE					
Vendor ID:	000000001					
Details				Personalize   Find	View All	st 🗳 1 of 1
File Name	Description	User	Name		Date/Time Stamp	
View						
Adding large	attachments can take some time to unload, therefy	na it is advisable to s	ave the			
transaction be	efore adding large attachments.	ore, it is advisable to se	We use			
Add Atta	chment					
OK	Cancel					
	Cancer					
<						>

Step	Action
6.	Click the Add Attachment button.
	Add Attachment

ORACL					
			Ho	me   Worklist	Add to Favorites   Sign out (?) Help
					Ŭ,
Vendor Atta	ichment				
SetID:	STATE				
Vendor ID:	000000001				
Details				Personalize   Find	View All   🖾   🛗 First 🚺 1 of 1 🕻
File Name	Description	User	Name		Date/Time Stamp
View					
	File	Attachmont			
		Attuchment			
			(2) Help		
Adding large :	attachments can take some time to upl		Browse		
transaction be	efore adding large attachments.				
	Uplo	Cancel			
Add Atta	achment				
ОК	Cancel				

Step	Action
7.	Click the <b>Browse</b> button.

Choose File to	Upload			l	? 🔀				
Look in	: 📋 My Documer	nts	🔹 🕄 💋	⊷ و		Hon	ne   Worklist	Add to Favorites	Sign out
My Recent Documents Desktop	Name		Size Type 206 KB Adobe	D. Acrobat Doc 10/	ate 🔨 /23				
My Documents								nd   View All   🖉   🛗   Date/Time Stamp	First C 1 of 1
My Computer					~		-		
<b>S</b>	<				>	(2) Help			
My Network Places	File name: Files of type:	All Files (*.*)		▼ Ope	en	Browse			
Add Attac	thment Cancel								

Step	Action
8.	Click the <b>Sample File</b> list item.
9.	Click the <b>Open</b> button.

ORAC	LE <sup>:</sup>			ŀ	ome   Worklist	Add to Favorites   Sign out (?) Help
Vendor Att	achment					
SetID: Vendor ID:	STATE 000000000	1				
Details						View Ali   🖾   🛗 First 🖸 1 of 1 🕻
File Name	Description	User	Name			Date/Time Stamp
Adding large transaction t Add Att OK	attachments can take some time to up lefore adding large attachments. achment Cancel	File Attachment Sample File pdf Upload Cancel		Hap Browse		2

Step	Action
10.	Click the Upload button.
	Upload

ORA	CLE.					l Worklint		Idd to Equaritan	l Sign out
Favorites	Main Menu > Vendor	s > Vendor Information > Add/Update	> Vendor		nome	WORKIST	11 1	Add to Pavonites	Sign Out
• :	• •	· ·							Help
									-
Vendor /	Attachment								
SetID:		STATE							
Vendor	ID:	000000001							
Dataila								2	
Details		Description	Uses	lama	<u>Pe</u>	ersonalize   <u>Fi</u>	nd   Viev	N All Ger IIII I	-irst 🗳 1 of 1 🗳
File Name	e	Description	User	name				Date/Time Sta	mp
Sample	<u>File.pdf</u>								
Adding la	irge attachments can tak	e some time to upload, therefore, it is advisa	ble to save the						
uansacut	on before adding large a	actiments.							
Add	Attachment								
Add	Attachment								
ок	Cancel								
<									>

Step	Action
11.	Enter Sample File into the Description field.
12.	Click the <b>OK</b> button.

ORACLE				
			Home Worklist	Add to Favorites   Sign out
Favorites Main Menu > Vendors >	Vendor Information > Add/Update	> Vendor		
				(?) Help
Summary Identifying Information	Address Contacts Location	Custom		
SatiD-	OTATE	*Vendor Name 1:	TOWN OF ANDOVER	
Vendes ID:	000000001	Vondor Namo 2	TOWN TREASURER	
vendor ib.	0660007860	0708C 001	Withholding	Non profit
*Vendor Short Name:	000009780G 00000	9780G-001	Withholding Vithholding	Entity Type:
*Classification:	Outside Party	Check for Duplicate	Copen ror ordering	W-9 Code: 45301
HCM Class:		~		Offset Status: Never
*Persistence:	Regular	~		
*Vendor Status:	Unapproved	~		
			Attachments (1)	
			Expan	Id All Collapse All
Mendor Polationchine				
Vendor Relationships	Cornerate Vender		Interligit Vender	
Comparate SatiD		Interligit Vender ID:	Interunit venuor	
Corporate Settb:	STATE	Interunit Vendor ID:		
Corporate Vendor ID:	000000001 TOW	N OF ANDOVER		
Create Bill-To Customer				
	Create Bill To Customer			
Additional ID Numbers				
Duplicate Invoice Settings				
Government Classifications				
Standard Industry Codes				
Additional Reporting Elements				
▶ Comments				
Expand All Collapse A	All			
🔚 Save 🔯 Return to Search 🔚 I	Notify	Add 🕹	🖉 Update/Display 🗾 Inc	clude History 🦻 Correct History
Summary I Identifying Information I Addre	ess   Contacts   Location   Custom			
Commun	No   O'O'Reene   Reconcert   Constant			
<				

Step	Action
13.	The <b>Attachments</b> (1) link now indicates that one attachment is associated with the vendor.
14.	End of Procedure.