

How to Attach a Created or Scanned Document to an ePro Requisition November 2005 (Updated May 2009)

When creating a requisition in ePro, the end-user can “attach” documents as “Header Comments” which will be available for review by the buyer and will copy into any associated purchase order as PO “Header Comments”. Examples of attachments include, but are not limited to, MS Word documents and scanned documents (vendor quotes, etc.)

Before a document can be attached to an ePro requisition, the end-user must scan or create the document and save it to any directory they have access to (hard-drive, server, etc.) The end-user then logs into PS and creates their requisition. Once the ePro requisition is created, the end-user completes the following steps to attach their saved document to the requisition Header Comments.

From the Requisition Review & Submit page, click the Header Comments hyperlink.

Note: Attachments must be done as Header (not line) Comments.

Create Requisition

Settings → Find Items → Modify Shipping → Modify Accounting → Review and Submit

Requisition Name: Attach Scanned Vendor Quote *Origin: ACQ

*Requester: shon Hon, Sharon S. Priority: Medium

| Requisition Summary | | | | View All | First | 1 of 1 | Last |
|--------------------------|---|---------|------|----------|----------|--------|------|
| | Description | *Qty | Unit | Price | Total | | |
| <input type="checkbox"/> | 1 Attaching a Scanned Vendor Quote saved on end-user hard-drive | 10.0000 | EACH | 150.000 | 1,500.00 | | |

Select All / Deselect All Total Amount: 1,500.00 USD

[Header Comments](#)

In the Comment field include a description of the attached documentation and click the Attach button:

Business Unit: UTMBG Requisition Date: 05/04/2009

Requisition ID: NEXT Status: Pending

Retrieve Active Comments Only

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending

Comments Find | View All First 1 of 1 Last

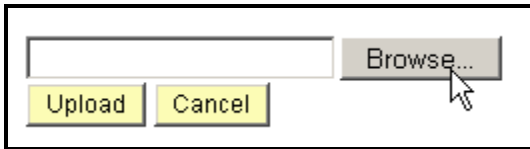
[Copy Standard Comments](#) Comment Status: Active

See attached Vendor Quote

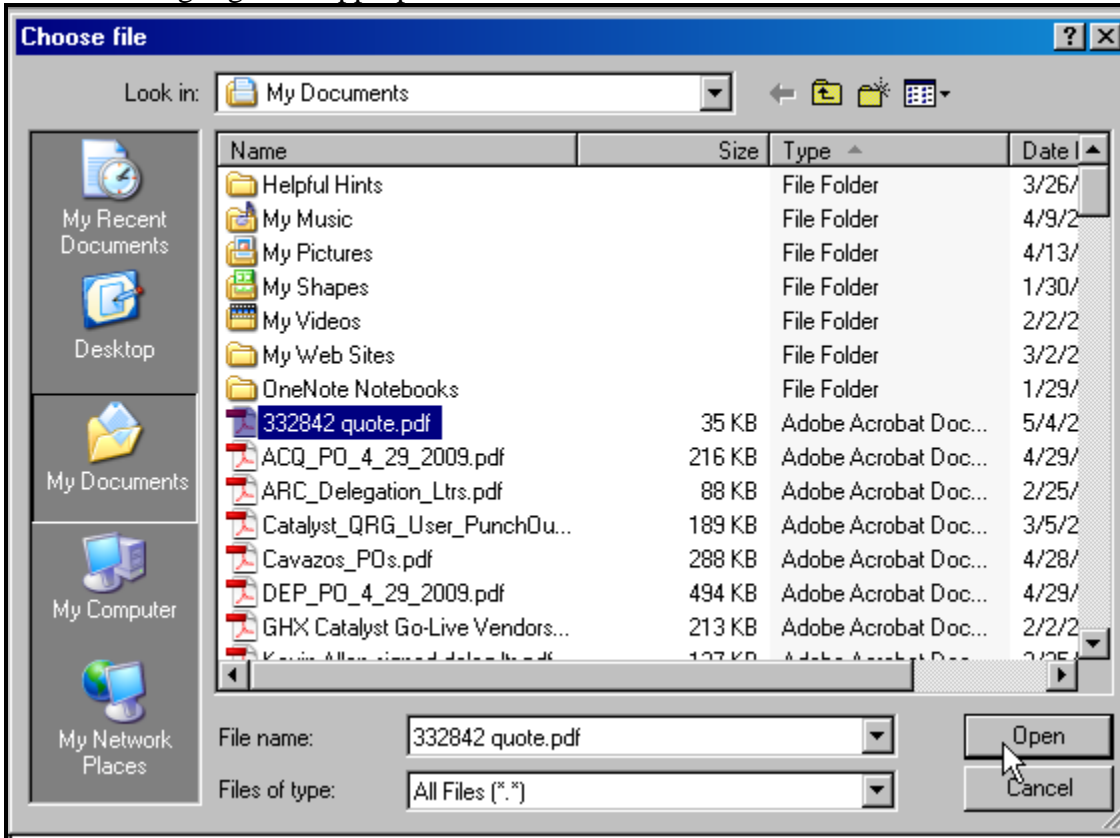
Send to Vendor Shown at Receipt Shown at Voucher

| Associated Document | |
|---------------------|--|
| Attachment | <input type="button" value="Attach"/> <input type="button" value="View"/> <input type="button" value="Delete"/> <input type="checkbox"/> Email |

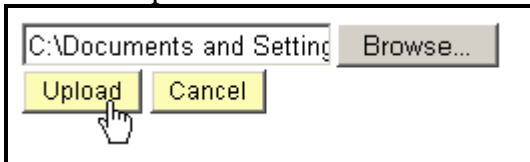
Click the Browse button to locate the document to be attached:



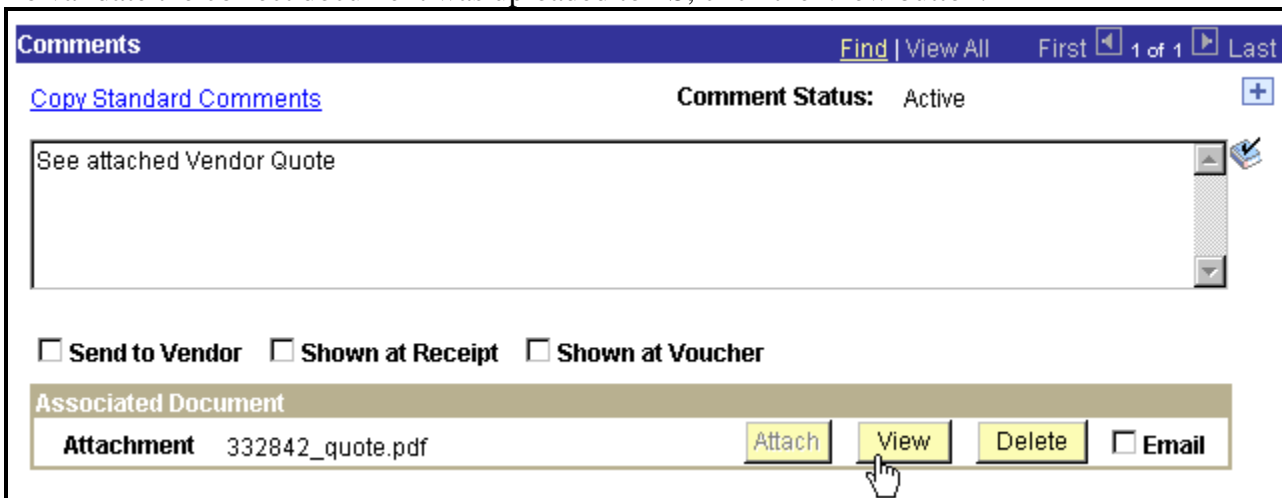
Locate and highlight the appropriate file and click OPEN:



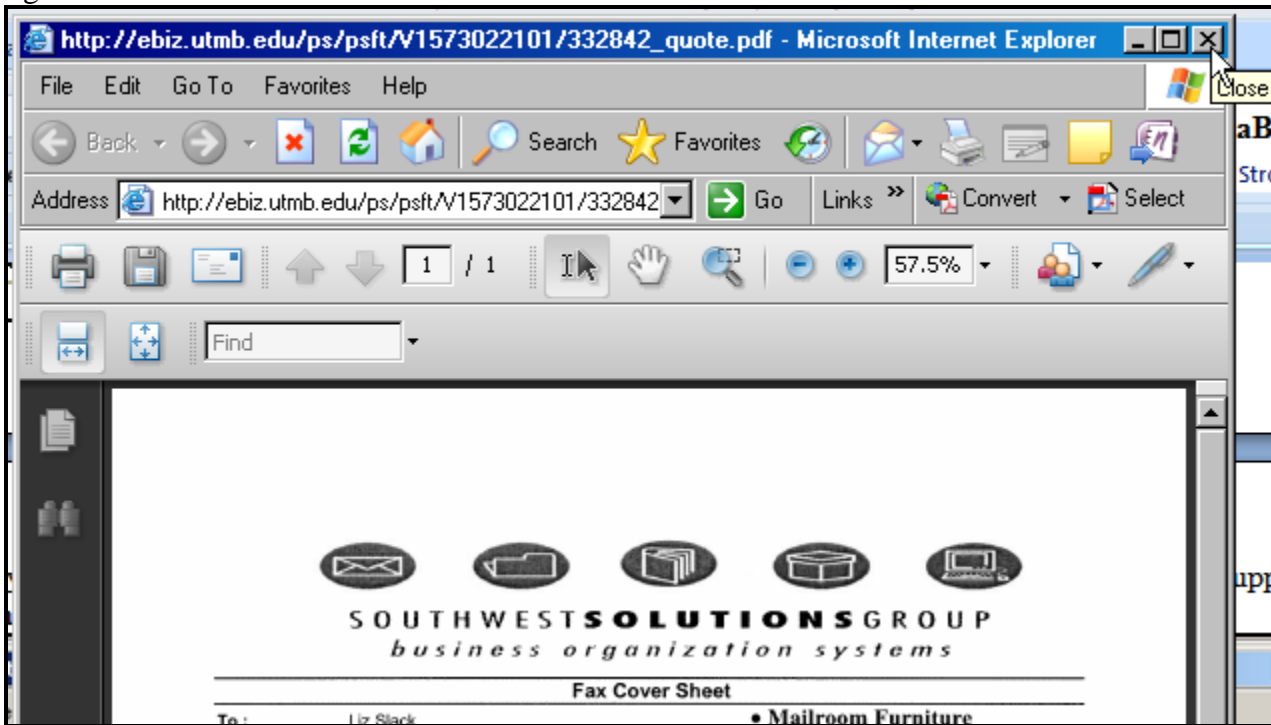
Click the Upload button:



To validate the correct document was uploaded to PS, click the View button:

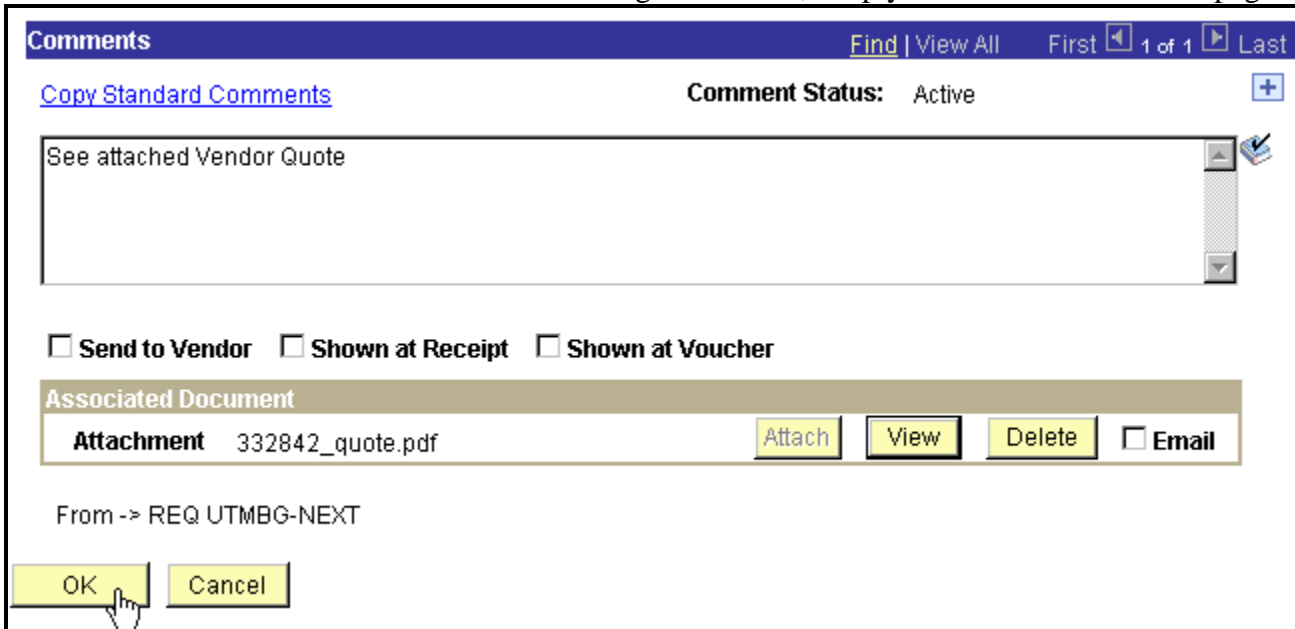


Once you have reviewed the document, close this internet explore window by clicking the “X” in the upper right hand corner:



Click OK to save the attachment to this requisition:

Note – if the end-user determines this is the wrong attachment, simply click cancel to exit this page.



The end-user then budget checks, saves, and submits the requisition for approval.

Note: When using a saved template where the original requisition had an attachment, the new requisition (created from the template) will not have the document attached automatically. The end-user will have to re-attach any required documentation to the new requisition as outlined above.