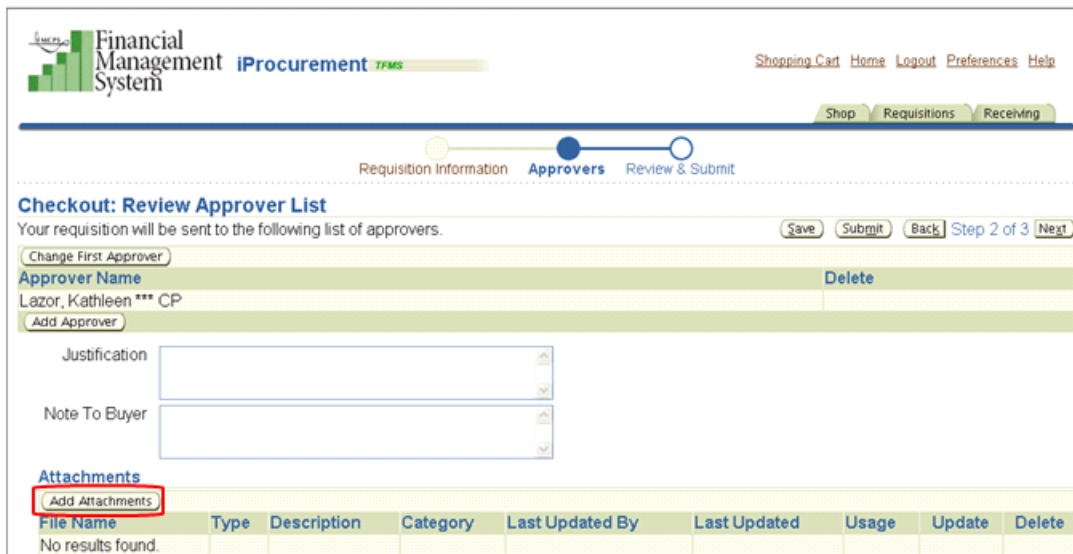


If important information and/or instructions need to be communicated regarding an order, attachment(s) can be added to a requisition during *Step 2* of the *Checkout* process. More than one attachment can be placed on a requisition. Attachments do not automatically open when the order is going through the approval process. To alert the workflow approvers of attachment(s), add a message in the *Justification* and *Note to Buyer* fields. A few examples of when to use an attachment would be:

- Pricing from suppliers if the dollar amount threshold requires quotes for buyer review.
- Inform a supplier of a delivery date that ordered items need to be received.
- Copy of a catalog page of the item(s) being ordered to assist the account manager, additional workflow approvers and the buyer.

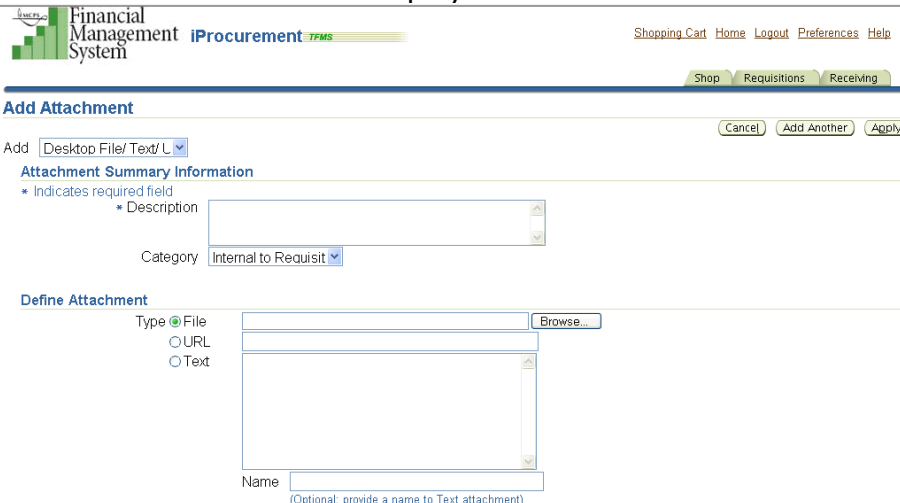
## Adding an Attachment During Step 2 of Checkout:

1. Click the **Add Attachments** button:



The screenshot shows the 'Checkout: Review Approver List' screen. At the top, there's a navigation bar with 'Shop', 'Requisitions', and 'Receiving' tabs. Below that, a progress indicator shows 'Requisition Information', 'Approvers', and 'Review & Submit'. The main content area is titled 'Checkout: Review Approver List' and includes a 'Change First Approver' button, a list of approvers (Lazor, Kathleen \*\*\* CP), and 'Justification' and 'Note To Buyer' text areas. At the bottom, the 'Attachments' section is visible, with the 'Add Attachments' button highlighted in a red box. Below this is a table with columns: File Name, Type, Description, Category, Last Updated By, Last Updated, Usage, Update, and Delete. The table currently shows 'No results found.'

2. The **Add Attachment** screen is displayed:



The screenshot shows the 'Add Attachment' screen. It features a navigation bar with 'Shop', 'Requisitions', and 'Receiving' tabs. The main content area is titled 'Add Attachment' and includes a 'Cancel' button, an 'Add Another' button, and an 'Apply' button. Below this, there's a dropdown menu for 'Add' (set to 'Desktop File/Text/URL'). The 'Attachment Summary Information' section includes a 'Description' field (marked as required) and a 'Category' dropdown (set to 'Internal to Requisition'). The 'Define Attachment' section includes radio buttons for 'File', 'URL', and 'Text', a 'Browse...' button, and a 'Name' field (with a note: 'Optional: provide a name to Text attachment').

3. In the **Add** field leave the default *Desktop File/Test/URL*



4. In the **Description** field enter an appropriate description of the attachment.  
**Attachment Summary Information**

\* Indicates required field

\* Description

5. In the **Category** field choose the appropriate person the attachment is intended for.

Category   
Internal to Requisition  
Miscellaneous  
To Approver  
To Buyer  
To Receiver  
To Supplier

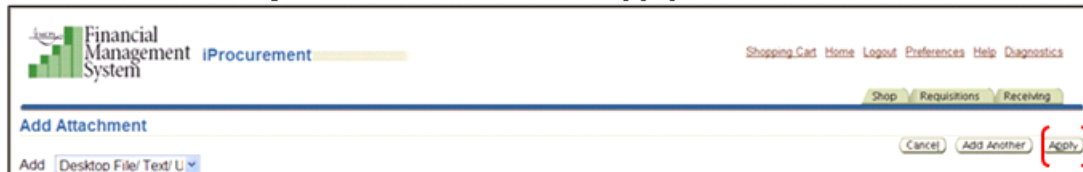
6. In the **Define Attachment** field, click the appropriate *Radio Button* for the **Type** of attachment you are creating.



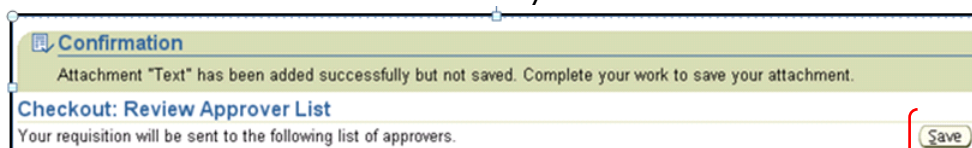
- If **Type** is **File**, select that *Radio Button* and click the **Browse** button to find the attachment.
- If **Type** is **URL**, select that *Radio Button* and copy and paste the website address in the field.
- If **Type** is **Text**, select that *Radio Button* and copy and paste the message used in the **Description** field.

7. In the **Name** field, enter a name for the attachment, if desired.

8. When finished adding the attachment click the **Apply** button.



9. A confirmation message is displayed that the attachment has been added, but not saved. **Click the Save button.** If the **Save** button is not chosen, the attachments will not appear on the PO and will not be communicated to your intended audience.



10. If another attachment needs to be added to the requisition, click the **Add Another** button and repeat the steps above.

The screenshot shows the top navigation bar of the Financial Management System iProcurement. On the left is the logo. On the right are links for Shopping Cart, Home, Logout, Preferences, Help, and Diagnostics. Below the navigation bar is a breadcrumb trail: Shop > Requisitions > Receiving. The main heading is 'Add Attachment'. Below it is a dropdown menu for 'Add' with 'Desktop File/ Text/ U' selected. To the right are three buttons: 'Cancel', 'Add Another' (highlighted with a red box), and 'Apply'.

11. After adding the attachment(s), use the *Justification* field and/or *Note to Buyer* field to inform the approvers of the attachment(s).

The screenshot shows the 'Checkout: Review Approver List' section. It starts with the heading 'Checkout: Review Approver List' and the text 'Your requisition will be sent to the following list of approvers.' Below this is a 'Change First Approver' button. The approver list is shown in a table with one row: 'Lazor, Kathleen \*\*\* CP'. There is an 'Add Approver' button below the table. Below the table are two text input fields: 'Justification' with the text 'Requesting delivery from supplier 7/25/20xx' and 'Note To Buyer' with the text 'See text attachment to supplier requesting delivery 7/25/20xx'. Both fields have up and down arrow buttons on the right side.