



Document Attachments

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Document Attachments

The Document Attachments feature allows you to upload and view documents by application, school year, folder, and document type. **This feature is not available in all districts.**

If you are logged on as a user assigned to a Document Attachments-enabled role, the **Documents** button is displayed on various pages in the TxEIS Business system. If a document is attached, the **Documents** button displays a note icon.

If you have full access, you can upload and download files. If you have read-only access, you can download existing files, but you cannot upload files.

If you are logged on with a role that does *not* have security access to Document Attachments, the **Documents** button is *not* displayed on any pages.

Document Attachment-enabled pages

| Application | Menu | Folder | Document Type |
|---------------------|--|----------------|---|
| Accounts Receivable | Tables > Customer Information | Customers | Other |
| Accounts Receivable | Maintenance > Create/Modify Invoice | Invoices | Invoices |
| Accounts Receivable | Maintenance > Invoice Approval | Invoices | Invoices |
| Accounts Receivable | Maintenance > Invoice Voids/Adjustments (read-only) | Invoices | Invoices |
| Accounts Receivable | Maintenance > Invoice Inquiry/Customer Notes > Inquiry | Invoices | Invoices |
| Accounts Receivable | Maintenance > Invoice Status Inquiry (read-only) | Invoices | Invoices |
| Asset Management | Maintenance > Inventory Maintenance | Asset | Other, Warranty |
| Bank Reconciliation | Maintenance > Bank Reconciliation | Reconciliation | Reconciliation |
| Finance | Maintenance > Vendor Information | Vendor | Bid Contract Other Quote Setup Form Sole Source W-9 |
| | | Vendor Catalog | Catalog |
| Finance | Maintenance > Postings > Journal Budget | Journal Entry | Journal Entry |
| Finance | Maintenance > Postings > Journal Inquiry | Journal Entry | Journal Entry |
| Finance | Maintenance > Postings > Purchase Order | Encumbrances | Encumbrances |

| Application | Menu | Folder | Document Type |
|---------------------|---|---|---|
| Finance | Maintenance > Postings > Cash Receipt | Cash Receipt | Cash Receipt |
| Finance | Maintenance > Postings > Credit Memo | Invoices | Invoices |
| Finance | Maintenance > Postings > Check Processing - PA | Invoices | Invoices |
| Finance | Maintenance > Postings > Check Processing - PO | Invoices | Invoices |
| Finance | Maintenance > Postings > Journal Actual | Journal Entry | Journal Entry |
| Finance | Maintenance > Pending Payables | Purchasing - Requisition Finance - Invoices | Purchasing - Receiving Finance - Invoices |
| Finance | Maintenance > Credit Card > Posting - PA | Invoices | Invoices |
| Finance | Maintenance > Credit Card > Posting - PO | Invoices | Invoices |
| Finance | Inquiry > GL Inquiry > GL Inquiry (read-only) | Accounts Receivable - Invoices Finance - Journal Entry Finance - Encumbrances Finance - Cash Receipt Finance - Invoices Purchasing - Requisition | Accounts Receivable - Invoices Finance - Journal Entry Finance - Encumbrances Finance - Cash Receipt Finance - Invoices Purchasing - Receiving |
| Finance | Inquiry > Vendor Inquiry > Vendor PO Inquiry (read-only) | Encumbrances | Encumbrances |
| Finance | Inquiry > Vendor Inquiry > Vendor Payment Inquiry (read-only) | Invoices | Invoices |
| Finance | Inquiry > Travel Reimbursement Inquiry (read-only) | TRVL | Other |
| Finance | Budget Amendment > Budget Amendment Maintenance | BAR | Other |
| Finance | Budget Amendment > Approve Budget Amendment | BAR | Other |
| Finance | Budget Amendment > Budget Amendment Inquiry (read-only) | BAR | Other |
| Grants and Projects | Maintenance > Member Grants > Grant Maintenance | NOGA | Other |
| Grants and Projects | Maintenance > Member Grants > Object Maintenance | NOGA | Other |
| Grants and Projects | Maintenance > Approval Dashboard | Budget Reimburse | Other Other |

| Application | Menu | Folder | Document Type |
|-------------|--|----------------|---|
| Personnel | Maintenance > Staff Demo > Demographic Information | Demographic | Application, Driver License, I-9, Other, Resume, SSN Card |
| Personnel | Maintenance > Staff Demo > Credentials | Credentials | Certification, Education |
| Personnel | Maintenance > Staff Demo > Verification | Verification | Contract, Signed Agreement |
| Personnel | Maintenance > Staff Demo > Service Record | Service Record | Service Record |
| Payroll | Maintenance > Staff Job/Pay Data | Payroll | Deduction, Other, W-4 |
| Payroll | Maintenance > Leave Account Transaction > Staff Leave Maint | Leave | Leave |
| Payroll | Maintenance > Leave Account Transaction > Leave Adjustment | Leave | Leave |
| Payroll | Maintenance > Leave Account Transaction > Employee Substitute | Leave | Leave |
| Purchasing | Maintenance > Vendor Order Addresses (read-only) | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Maintenance > Create/Modify Requisition Vendor Directory (read-only) | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Maintenance > Create/Modify Requisition | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Maintenance > Create/Modify Contract Requisition | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Maintenance > Approve Requisition | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Maintenance > Bundle Requisitions (read-only) | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Maintenance > Receiving | Receiving | Receiving Invoice |
| Purchasing | Inquiry > Requisition Status Inquiry | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Inquiry > Contract Requisition Status Inquiry | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Next Year > Maintenance > Create/Modify Requisition | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Next Year > Maintenance > Create/Modify Contract Requisition | Requisition | Supporting Forms, Vendor Documents |
| Purchasing | Next Year > Maintenance > Approve Requisition | Requisition | Supporting Forms, Vendor Documents |
| Warehouse | Maintenance > Inventory Maintenance | Items | Other |

List of permissible file types

| File Extension | Document Type |
|----------------|---|
| .doc | application/msword |
| .docx | application/vnd.openxmlformats-officedocument.wordprocessingml.document |

| File Extension | Document Type |
|----------------|---|
| .gif | image/gif |
| .jpeg | image/jpeg |
| .jpg | image/jpeg |
| .pdf | application/pdf |
| .png | image/png |
| .pps | application/vnd.ms-powerpoint |
| .ppt | application/vnd.ms-powerpoint |
| .pptx | application/vnd.openxmlformats-officedocument.presentationml.presentation |
| .tif | image/tiff |
| .tiff | image/tiff |
| .txt | text/plain |
| .xls | application/vnd.ms-excel |
| .xlsx | application/vnd.openxmlformats-officedocument.spreadsheetml.sheet |

Upload or view documents:

Under **Document List**:

| Field | Description |
|---------------------------|--|
| Application | The application you are currently logged on to is displayed (e.g., Finance). |
| Folder | Select the folder for which you want to view or attach a document. Different types of documents must be uploaded to specific folders. Changing the folder will change the document type options in the Select Type field. |
| Select School Year | Select the school year for which you want to view documents. Student documents are stored by year. |


Existing documents are displayed according to specified criteria.

Under **Document Upload**:

| Field | Description |
|------------------------------|---|
| Select File to Upload | Click Choose File . Locate and select the document on your computer or network. The file name is displayed next to Choose File . |
| School Year | Select the school year for which you want to view documents. Student documents are stored by year. |
| Select Type | Select the type of document you are uploading. The list varies according to your selection in the Folder field. |
| Description | Type an optional description of the document. |
| Upload File | Click to upload the file. <ul style="list-style-type: none"> The document is listed in the Document List section. The date-time stamp and user ID display the date and time the document was uploaded and the user ID of the user who uploaded the document. |

Any changes made in the Document Options window are saved when you close the window.

Other Functions and Features:

| | |
|---|---|
| Type | Click the link in the Type column to download the file to your computer to view it. |
| Choose File | Click again to add another document, and repeat the steps for uploading a document. |
|  | Click to delete the document from the record. You are prompted to confirm that you want to delete the document. |

NOTES

- Deleted documents are not actually deleted from the Document Attachments server. You can retrieve deleted files using the Document Attachments File Recovery utility in District Administration.



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