

Document Attachments

Table of Contents

Document Attachments 1

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. Some pages contain read-only 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 Vendor Catalog	Bid Contract Other Quote Setup Form Sole Source W-9 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.presentationalml.presentation
.tif	image/tiff
.tiff	image/tiff
.txt	text/plain
.xls	application/vnd.ms-excel
.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

List of document types by application and folder

Application	Folder	Document Type
Accounts Receivable	Customers	Other
Accounts Receivable	Invoices	Invoices
Asset Management	Asset	Other, Warranty
Bank Reconciliation	Reconciliation	Reconciliation
Finance	BAR	Other
Finance	Cash Receipt	Cash Receipt
Finance	Invoices	Invoices
Finance	Journal Entry	Journal Entry
Finance	Vendor	Bid Contract, Other, Quote, Set Up Form, Sole Source, W-9
Finance	Vendor Catalog	Catalog
Finance	TRVL	Other
Grants and Projects	Budget	Other
Grants and Projects	NOGA	Other
Grants and Projects	Reimburse	Other
Payroll	Leave	Leave
Payroll	Payroll	Deduction, Other, W-4
Personnel	Credentials	Certification, Education
Personnel	Demographic	Application, Driver License, I-9, Other, Resume, SSN Card
Personnel	Service Record	Service Record
Personnel	Verification	Contract, Signed Agreement
Purchasing	Receiving	Receiving Invoice
Purchasing	Requisition	Supporting Forms, Vendor Documents
Warehouse	Items	Other

Notes:

- There is a 30MB maximum upload size.
- All changes made in the Document Options window are saved when you close the window. You do not have to click Save after you close the dialog box.

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**.
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. • 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.

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.
- If a user deletes a requisition from the Purchasing > Maintenance > Create/Modify Requisition or Create/Modify Contract Requisition pages, the attached documents are deleted.
- Only users who are approvers can upload documents for a requisition on the Purchasing > Maintenance > Approve Requisition page.
- If a user uses the Purchasing > Utilities > Mass Delete Requisition Records page to delete requisitions, all associated document attachments are deleted.


ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS
ASCENDER GUIDES
ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS

Back Cover