



## 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 ASCENDER 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         | Bid<br>Contract<br>Other<br>Quote<br>Setup Form<br>Sole Source<br>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  |

| <b>Application</b>  | <b>Menu</b>   | <b>Folder</b>   | <b>Document Type</b>  |
|---------------------|---|---|---|
| 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<br>Finance - Invoices  | Purchasing - Receiving<br>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<br>Finance - Journal Entry<br>Finance - Encumbrances<br>Finance - Cash Receipt<br>Finance - Invoices<br>Purchasing - Requisition | Accounts Receivable - Invoices<br>Finance - Journal Entry<br>Finance - Encumbrances<br>Finance - Cash Receipt<br>Finance - Invoices<br>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<br>Reimburse   | Other<br>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         |

#### 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 10MB 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  |
|--------------------|--|
| <b>Application</b> | The application you are currently logged on to is displayed (e.g., Finance).   |
| <b>Folder</b>      | 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 <b>Select Type</b> field. |

Existing documents are displayed according to specified criteria.

Under **Document Upload**:

| Field                        | Description   |
|------------------------------|---|
| <b>Select File to Upload</b> | Click <b>Choose File</b> . Locate and select the document on your computer or network. The file name is displayed next to <b>Choose File</b> .  |
| <b>Select Type</b>           | Select the type of document you are uploading. The list varies according to your selection in the Folder field.   |
| <b>Description</b>           | Type an optional description of the document.   |
| <b>Upload File</b>           | Click to upload the file. <ul style="list-style-type: none"> <li>• The document is listed in the <b>Document List</b> section.</li> <li>• 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.</li> </ul> |

## Other Functions and Features:

|   |   |
|---|---|
| <b>Type</b>   | Click the link in the <b>Type</b> column to download the file to your computer to view it.                      |
| <b>Choose File</b>  | 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.



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