

## MHC attaching documents in SmartOffice RQ10

In SmartOffice Requisition-RQ10 once you create a requisition see below to attach documents

The screenshot shows the 'Requisition - RQ10.1' form. The top navigation bar includes 'Actions', 'Related', 'Tools', and icons for '+ Add', 'Change', 'Delete', 'Previous', 'Inquire', 'Next', 'Print', and 'Inquire'. On the right, there are 'Zoom' and 'Help' icons. The form fields include: 'Requester' (empty), 'Requisition Number' (empty), 'Total' (empty), 'Company' (empty), 'Requesting Location' (empty), 'Deliver To' (empty), 'From Company' (empty), 'From Location' (empty), 'Location Rule' (empty), and 'Requested Delivery Date' (empty with a calendar icon). A tabbed interface at the bottom shows 'Header' selected, with other tabs for 'Miscellaneous', 'Lines', 'Template', 'Drop Ship', 'PO Bill To', 'User Fields', and 'Global'.

To add attachments, click the **Upload Attachments** Button (Requisition must be created before button appears)

This screenshot shows the same 'Requisition - RQ10.1' form, but now populated with data. A yellow arrow points to the 'Upload Attachments' button, which is highlighted with a purple border. The form fields are: 'Requester' (hanleyp) Patricia Hanley, 'Requisition Number' (1220707) Processed, 'Total' (571.25) USD, 'Company' (9000) University Hospital, and 'Requesting Location' (IR001) Interventional Radiology. The 'Deliver To' field is empty. The 'Upload Attachments' button is located below the navigation bar and above the form fields.

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Click **Attach**

The screenshot shows the SmartOffice RQ10 interface. On the left, there is an 'Upload' section with a button and the text 'Upload a PDF to replace the image below.' Below this is a search bar with '1 of 1' and a magnifying glass icon. The main content area displays a list of fields: RQC User: bakerk, Company #: 9000, Date: 07/02/2021, Req #: 1220707, and Vendor Name: SYNERGY GLOBAL SOLUTIONS. On the right, there is a 'Document Info' sidebar with a printer icon. It contains 'Index Fields' with values: DocID: 64, Creation Date: 07/02/2021, Upload User: drill: nina bedworth, Page Count: (empty), RQC User: bakerk, Company #: 9000, Date: 07/02/2021. Below this is the 'Notes and Attachments' section with buttons for 'Add Note', 'Attach', and 'View All'. A red icon and text 'sectest02' are visible, along with a timestamp '7/2/2021 9:40:18 AM' and the filename 'Sample Quote.pdf'. A yellow arrow points from the 'Attach' button in the sidebar to the 'Attach File' dialog box shown in the next image.

Click **Choose File** to navigate to file location to attach, you can also type a note in the description area.

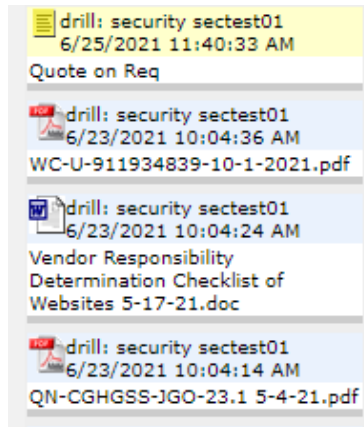
Click **Save**

The 'Attach File' dialog box is shown. It has a title bar 'Attach File'. Below the title bar, it says 'Browse to the file you wish to attach:' followed by a 'Choose File' button and the text 'No file chosen'. Below that is a text input field with the placeholder 'Enter description for this file:'. A yellow arrow points to the 'Choose File' button. Another yellow arrow points to the 'Save' button at the bottom right of the dialog box.

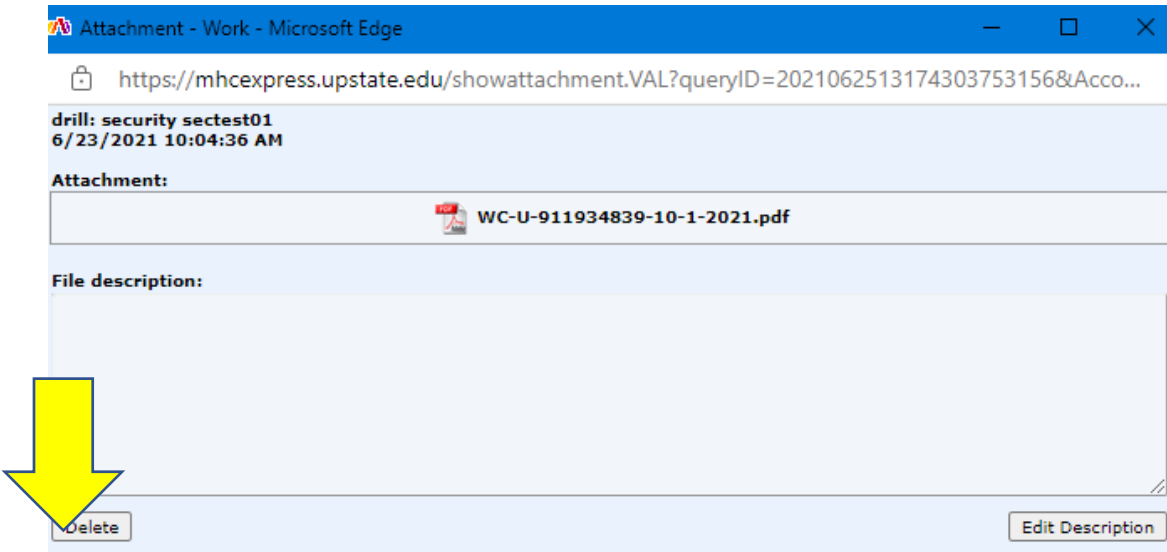
Files can be added one at a time

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To Delete an Attachment or Note click on the item to delete

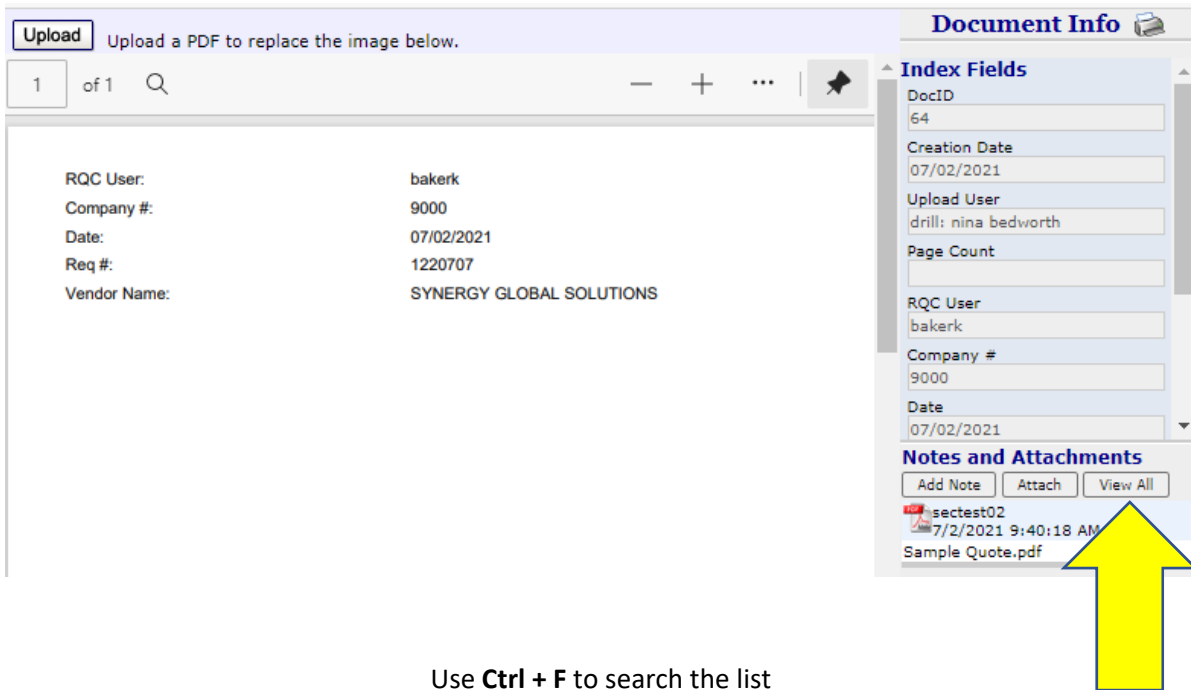


Click **Delete** in the pop-up window



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To see a list of all the attachments for the PO click **View All**

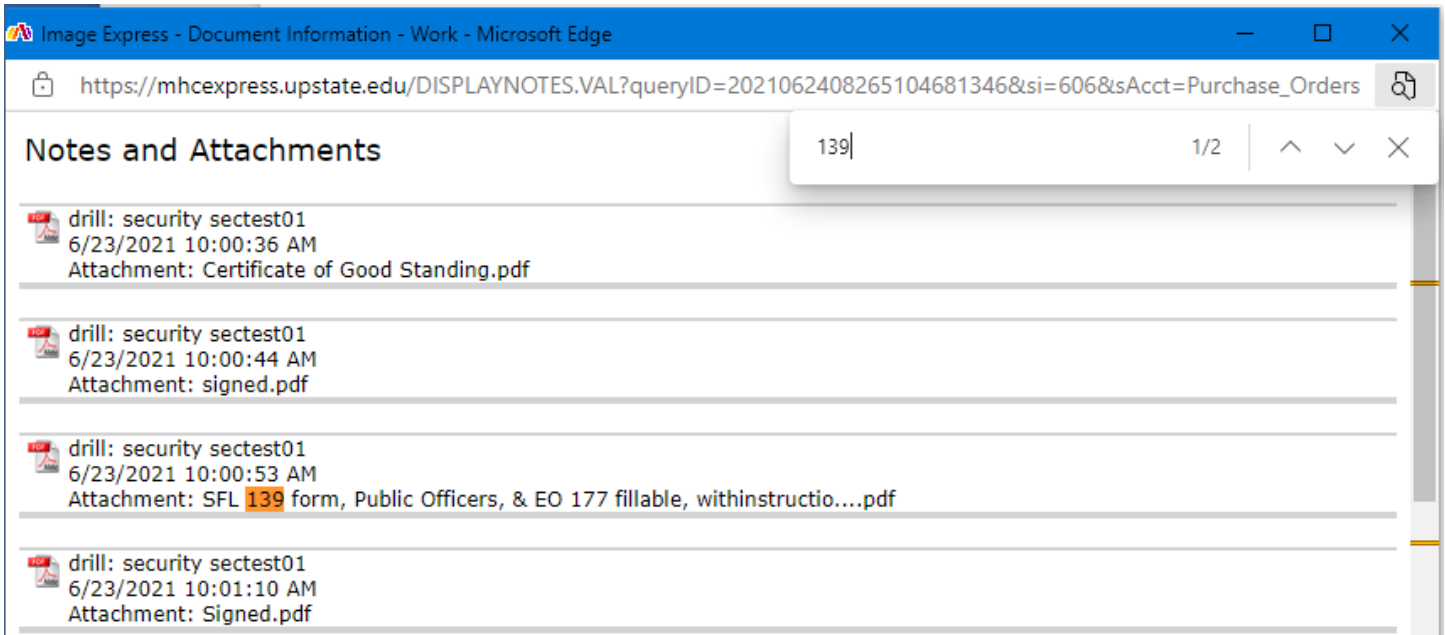


The screenshot shows the SmartOffice RQ10 interface. On the left, there is an 'Upload' section with a text box and a search icon. Below it, a form displays the following information:

RQC User:	bakerk
Company #:	9000
Date:	07/02/2021
Req #:	1220707
Vendor Name:	SYNERGY GLOBAL SOLUTIONS

On the right, the 'Document Info' panel is visible. It contains 'Index Fields' and 'Notes and Attachments'. The 'Index Fields' section includes fields for DocID (64), Creation Date (07/02/2021), Upload User (drill: nina bedworth), Page Count, RQC User (bakerk), Company # (9000), and Date (07/02/2021). The 'Notes and Attachments' section has buttons for 'Add Note', 'Attach', and 'View All'. Below these buttons, a list of attachments is shown, including 'Sample Quote.pdf' with a timestamp of 7/2/2021 9:40:18 AM. A yellow arrow points to the 'View All' button.

Use **Ctrl + F** to search the list

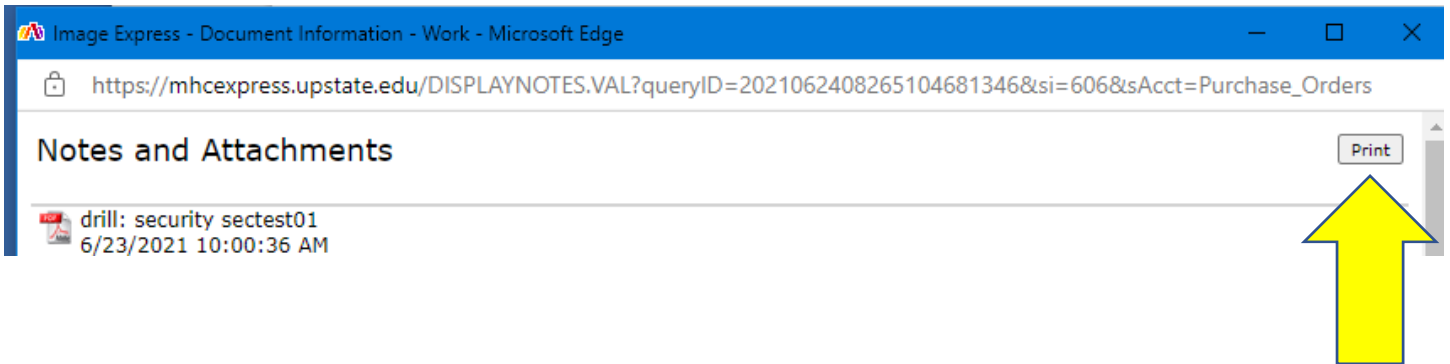


The screenshot shows a Microsoft Edge browser window titled 'Image Express - Document Information - Work - Microsoft Edge'. The address bar contains the URL: [https://mhcxpress.upstate.edu/DISPLAYNOTES.VAL?queryID=2021062408265104681346&si=606&sAcct=Purchase\\_Orders](https://mhcxpress.upstate.edu/DISPLAYNOTES.VAL?queryID=2021062408265104681346&si=606&sAcct=Purchase_Orders). The main content area is titled 'Notes and Attachments' and displays a list of attachments. A search bar at the top of the list contains the text '139'. The list shows four entries, each with a document icon, a user name, a timestamp, and an attachment name:

- drill: security sectest01  
6/23/2021 10:00:36 AM  
Attachment: Certificate of Good Standing.pdf
- drill: security sectest01  
6/23/2021 10:00:44 AM  
Attachment: signed.pdf
- drill: security sectest01  
6/23/2021 10:00:53 AM  
Attachment: SFL 139 form, Public Officers, & EO 177 fillable, withinstructio....pdf
- drill: security sectest01  
6/23/2021 10:01:10 AM  
Attachment: Signed.pdf

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You can print the list by clicking **Print**



Use the **X** to close the window

