# **TxEIS DOCUMENT ATTACHMENTS**

The Document Attachments feature allows you to upload and view documents by application, school year, folder, and document type. **This feature is only available to hosted 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.

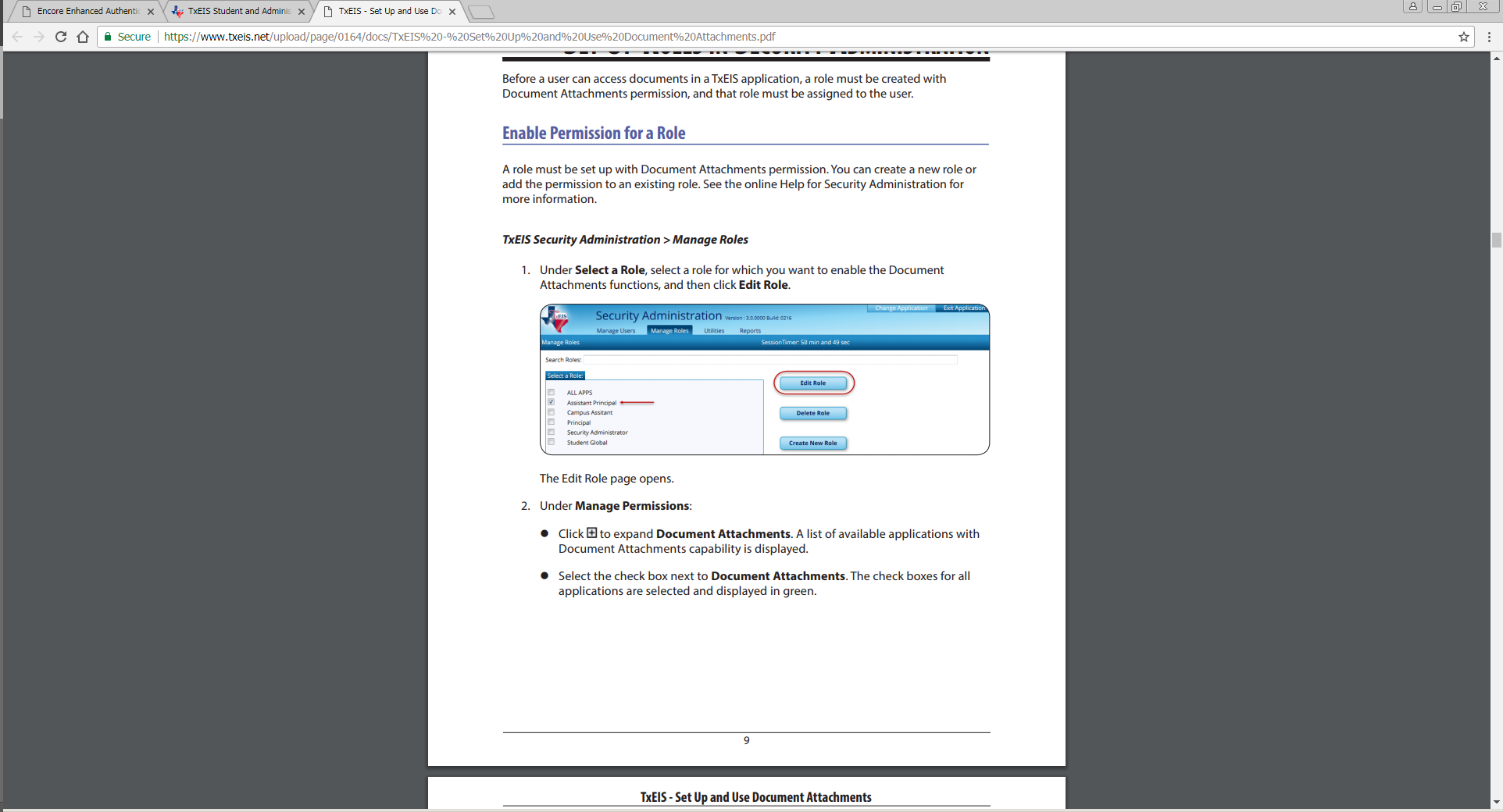
If you are logged on with a role that does not have security access to Document Attachments, the **Documents** button is not displayed on any pages.

# **SET UP ROLES IN SECURITY ADMINISTRATION**

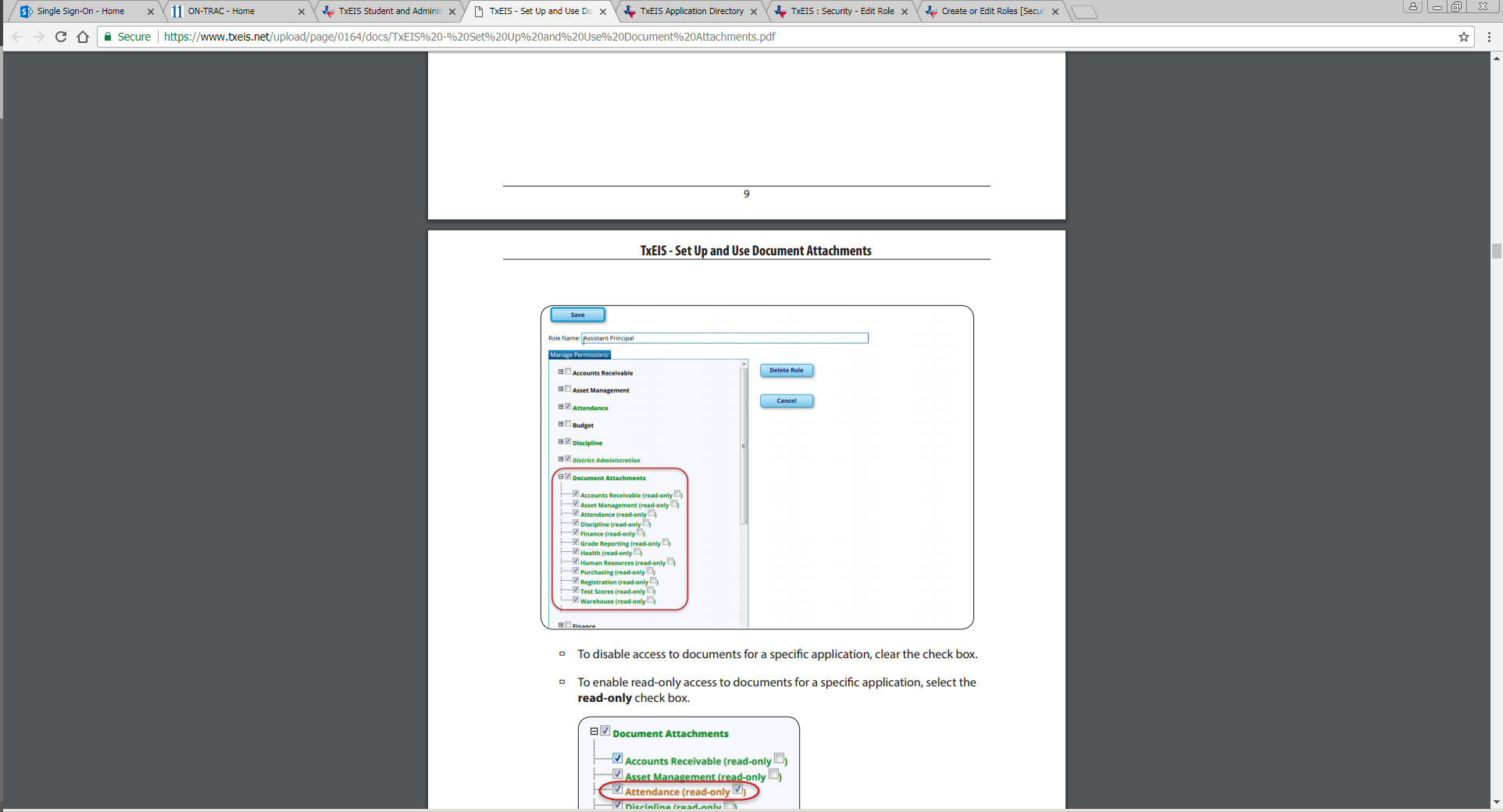
Before a user can access documents in a TxEIS application, a role must be created with Document Attachments permission, and that role must be assigned to the user. A new role can be created, or the permission can be added to an existing role.

# **TxEIS Security Administration > Manage Roles:**

**Select a Role –** select a role for which you want to enable the Document Attachments functions, then click **Edit Role.**



**Manage Permissions –** select + to expand **Document Attachments.** A list of available applications with Document Attachments capability is displayed. Select the box next to **Document Attachments.** All boxes for all applications are selected and displayed in green. Unselect any that should not be viewed by this user.

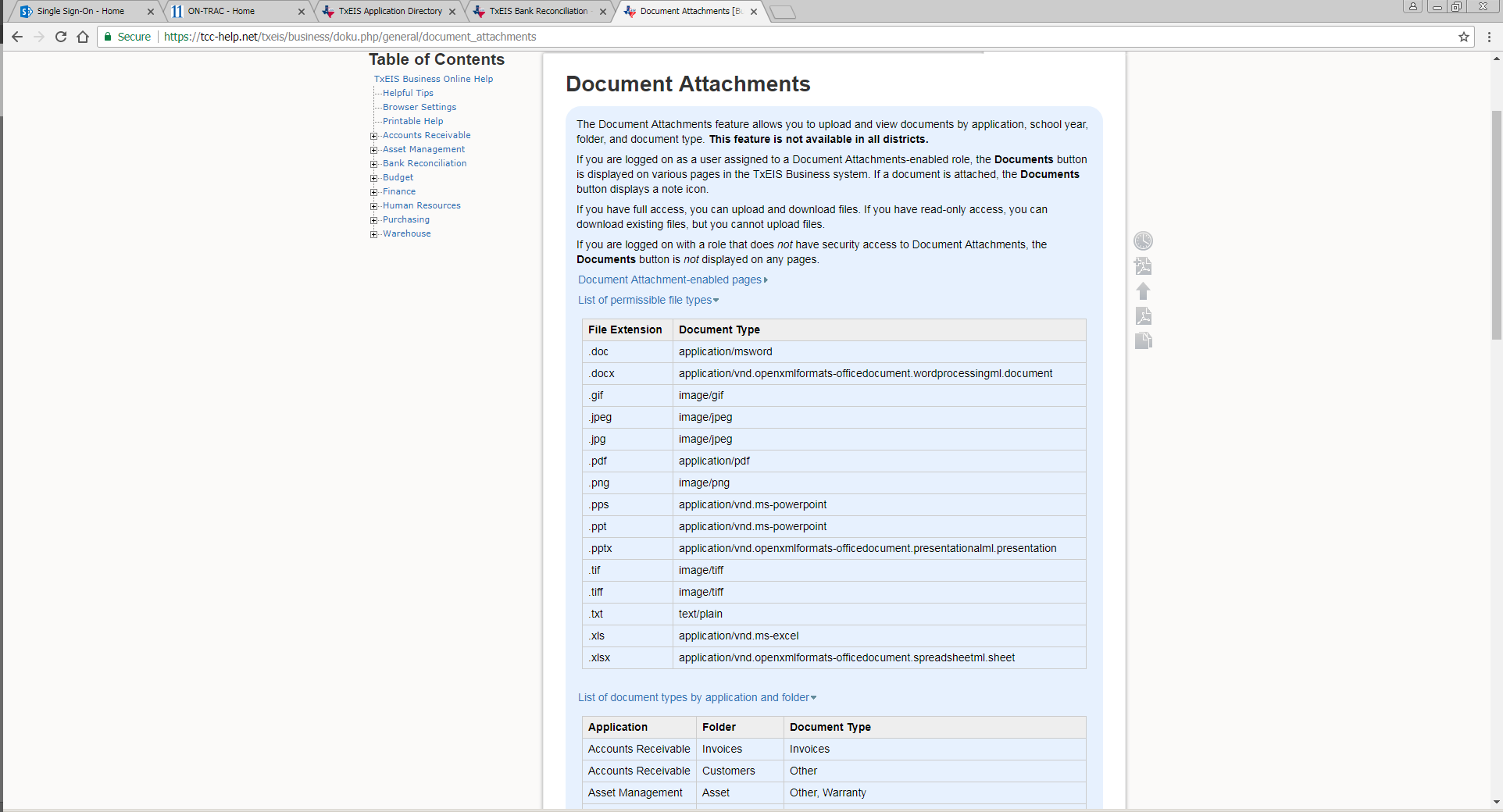


**Read-only** will allow the user to view the reports, but not upload or delete reports.

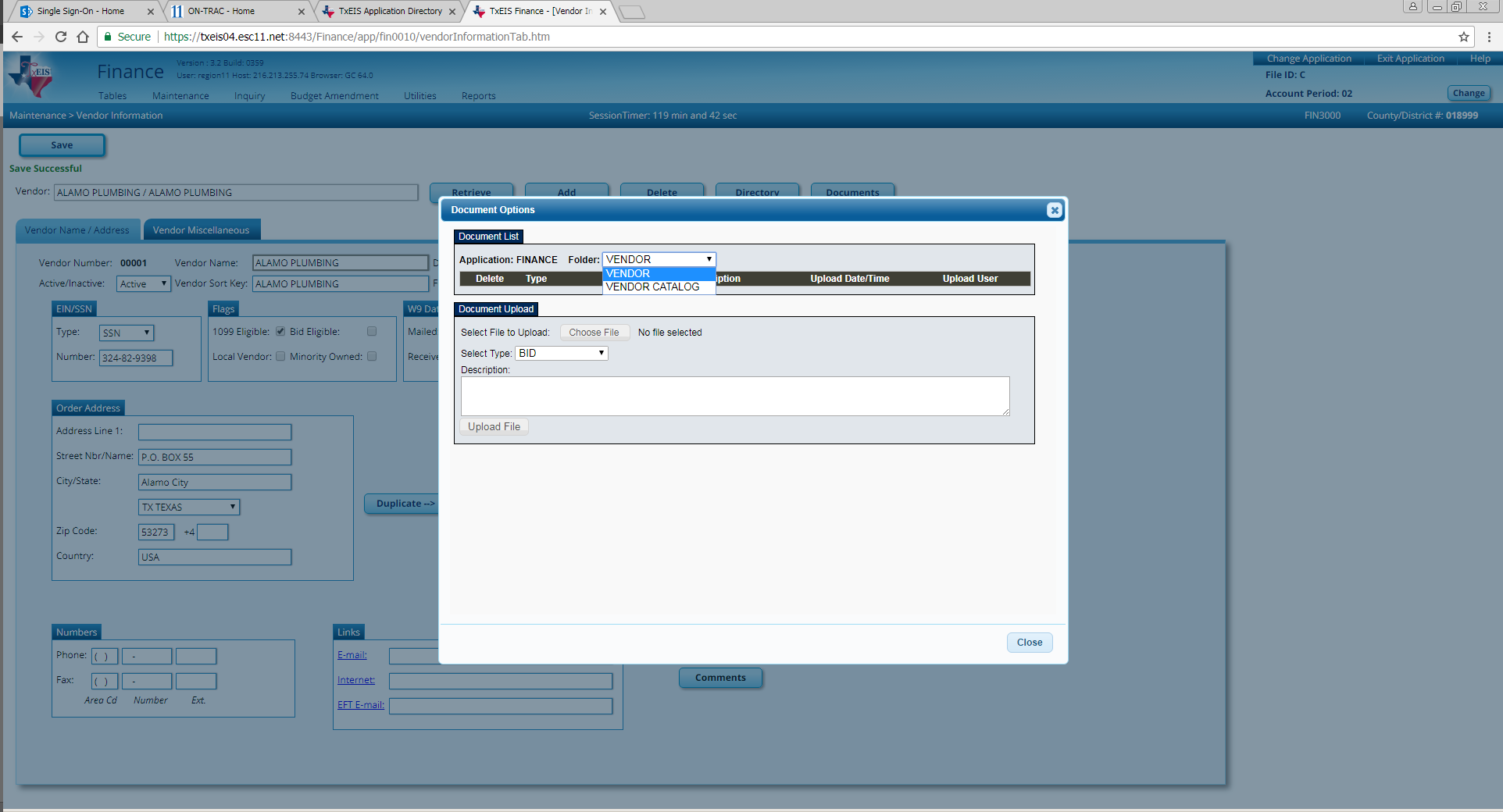
# **UPLOAD OR VIEW DOCUMENTS**

The Document Attachment process works the same for each screen. For a list of all the screens that have Document Attachments enabled, please see page 6 of this document.

The following file types are permissible in Document Attachments:



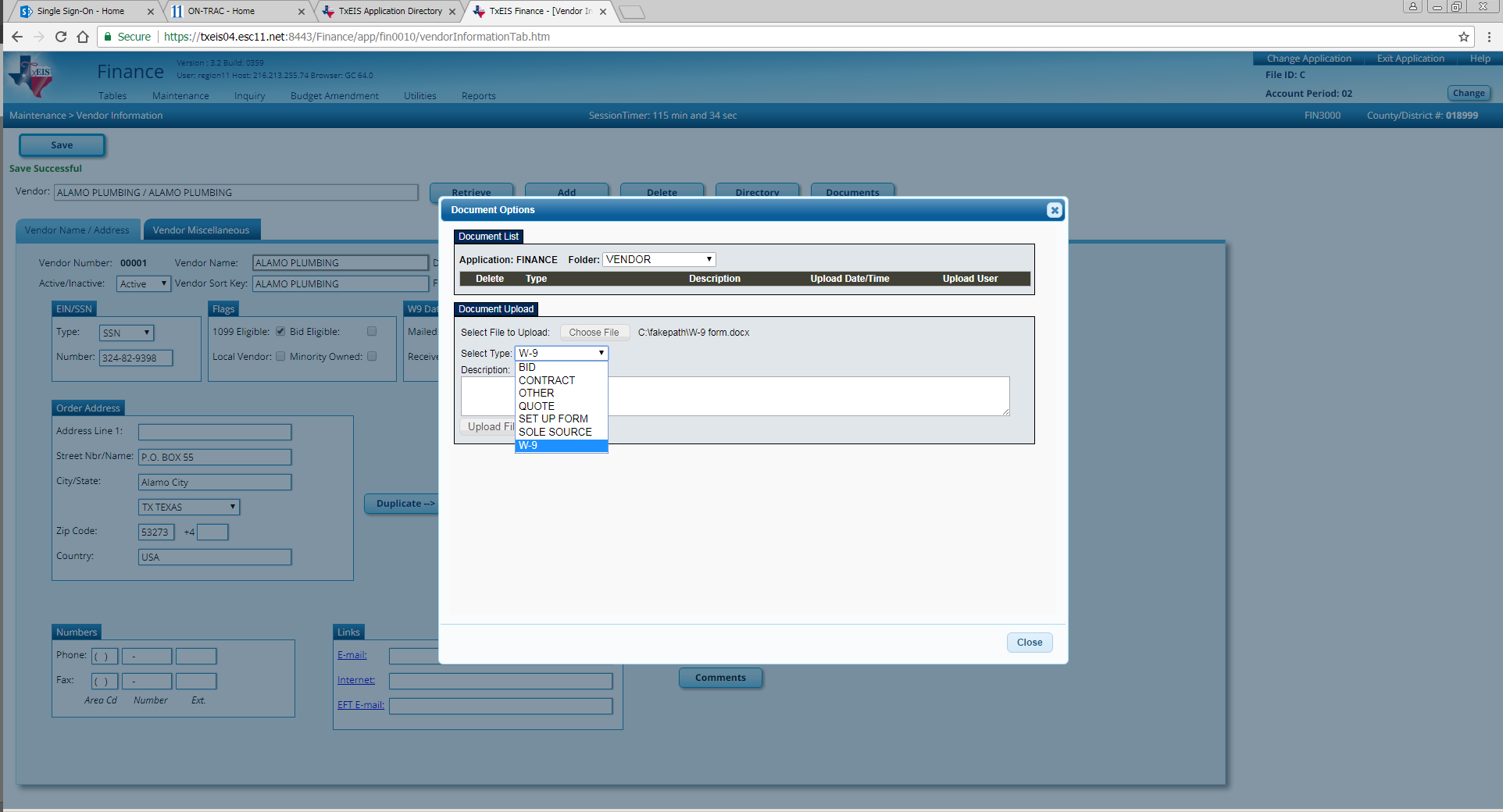
**Under ‘Document List’:**



**Application** – the application currently logged onto is displayed. (e.g. Finance)

**Folder** – Select the folder for which you want to view or attach a document. Different types of documents may be uploaded to specific folders. Changing the folder will change the document type options in the **Select Type** field. Some screens will not have more than one folder, meaning no drop down will be available.

**Under ‘Document Upload’:**



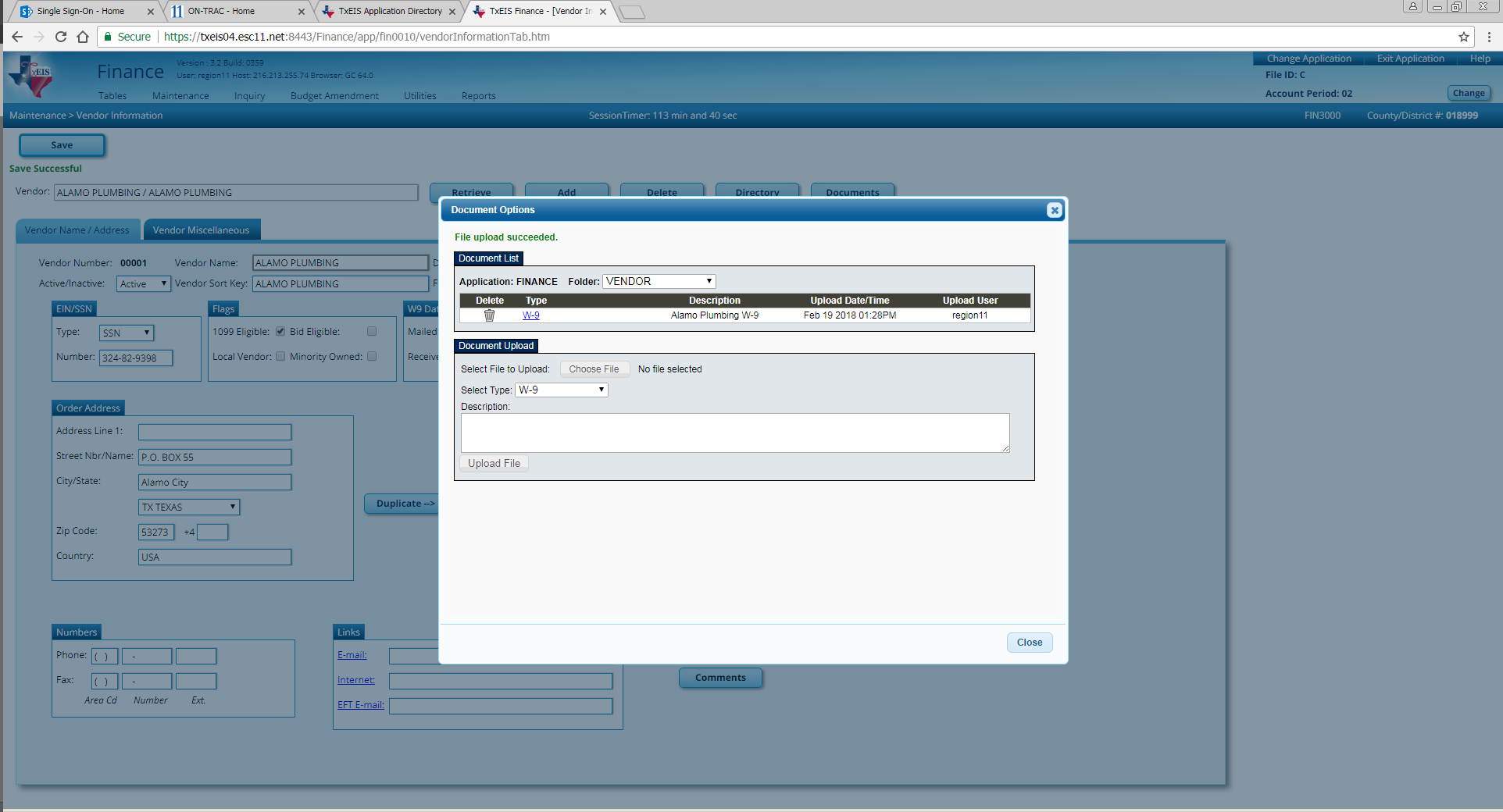
**Select File to Upload** – Click **Choose File.** Locate and select the document on your computer or network. The file name is displayed next to **Choose File**.

**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.



Any changes made in the **Document Options** window are saved when the window is closed.

**Other Functions and Features:**

**Type** – Click the link in the **Type** column to download the file to your PC to view it.

**Choose File** – Click again to add another document, and repeat the steps for uploading a document.

https://tcc-help.net/txeis/business/lib/exe/fetch.php/images/trash_delete.gif - Click to delete the document. The user is prompted to confirm that the document should be deleted.

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. These documents cannot be recovered from the Document Attachments File Recovery utility.
* If a user uses the Purchasing > Utilities > Mass Delete Requisition Records page to delete requisitions, all associated document attachments are deleted. This is important to remember when completing the end of year processes in TxEIS. These documents cannot be recovered from the Document Attachments File Recovery utility.

# DOCUMENT ATTACHMENT-ENABLED PAGES

**APPLICATION MENU**

Accounts Receivable Tables > Customer Information

Accounts Receivable Maintenance > Create/Modify Invoice

Accounts Receivable Maintenance > Invoice Approval

Accounts Receivable Maintenance > Invoice Voids/Adjustments (read-only)

Accounts Receivable Maintenance > Invoice Inquiry/Customer Notes > Inquiry

Accounts Receivable Maintenance > Invoice Status Inquiry (read-only)

Bank Reconciliation Maintenance > Bank Reconciliation

Asset Management Maintenance > Inventory Maintenance

Finance Maintenance > Vendor Information

Finance Maintenance > Postings > Journal Budget

Finance Maintenance > Postings > Journal Inquiry (read-only)

Finance Maintenance > Postings > Purchase Order

Finance Maintenance > Postings > Cash Receipt

Finance Maintenance > Postings > Credit Memo

Finance Maintenance > Postings > Journal Actual

Finance Maintenance > Credit Card > Posting - PA

Finance Maintenance > Credit Card > Posting – PO

Finance Inquiry > GL Inquiry > GL Inquiry (read-only)

Finance Inquiry > Vendor Inquiry > Vendor PO Inquiry (read-only) If created in finance

Finance Inquiry > Vendor Inquiry > Vendor Pmt Inquiry (read-only) if created in finance

Finance Budget Amendment > Budget Amendment Maintenance

Finance Budget Amendment > Approve Budget Amendment

Finance Budget Amendment > Budget Amendment Inquiry (read-only)

Human Resources Maintenance > Staff Demo

Human Resources Maintenance > Staff Job/Pay Data

Human Resources Maintenance > Leave Account Transaction

Purchasing Maintenance > Vendor Order Addresses (read-only)

Purchasing Maintenance > Create/Modify Requisition

Purchasing Maintenance > Create/Modify Contract Requisition

Purchasing Maintenance > Approve Requisition

Purchasing Maintenance > Receiving

***Note: A ‘Receiving Documents’ and ‘Vendor Documents’ button will display. Vendor documents attached in the finance application will display under ‘Vendor Document’ on this screen.***

Purchasing Inquiry > Requisition Status Inquiry (read-only)

Purchasing Inquiry > Contract Requisition Status Inquiry (read-only)

Purchasing Next Year > Maintenance > Create/Modify Requisition

Purchasing Next Year > Maintenance > Create/Modify Contract Requisition

Purchasing Next Year > Maintenance > Approve Requisition