

Job Aid: How to Maintain a Document Library

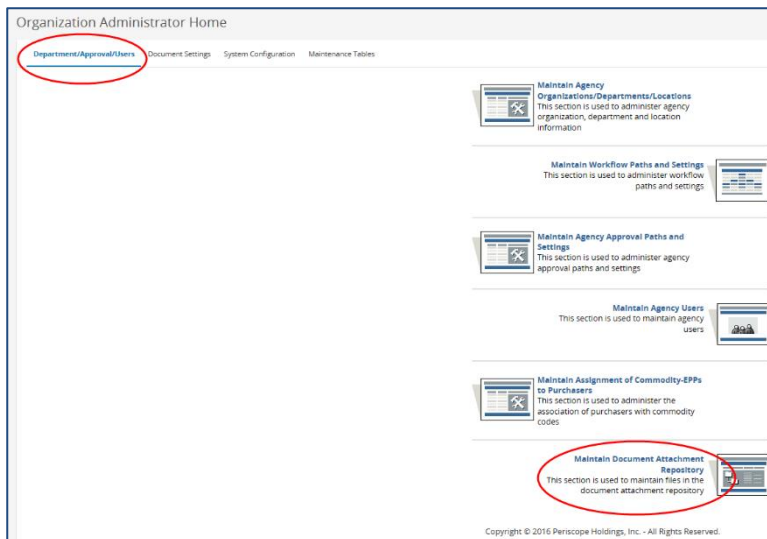
This Job Aid shows how to:

- Create and Maintain a Document Library in COMMBUYS

Of Special Note:

The Document Library, which in COMMBUYS is referred to as the Attachment Repository, is used to create a library of frequently used documents or standard department forms. These forms will reside in a central repository available to all department users. You will be able to organize a folder structure to support the library and devise a naming convention and description for the documents which will aid in retrieval. Buyers will be able to search, download, and attach these documents to bids, requisitions, or contracts (MBPOs or Master Blanket Purchase Orders). Documents and forms can also be designated to automatically attach based on the transaction type and designate which auto-attached forms are required (i.e. bid, requisition, purchase order). There is no document editing within COMMBUYS, therefore the use of auto-attach should be reserved for all files/documents that do not require the end user to update for each purchase or bid.

Screenshot



Directions

Step 1: Clicking on the Maintain Document Attachment Repository Icon

This is the Organization Administrator Home Page which is the Control Center for all actions related to organization configuration and maintenance.

The home page opens on the **Department/Approval/Users** tab. This page is the main menu and the starting point for most Organization Administrator actions.

To create folders or add documents, click on the **Maintain Document Attachment Repository** icon.

COMMBUYS will open the **Maintain Attachment Repository** view for the user's current organization.

Maintain Attachment Repository

Repository Location: NonSearchable ▼

 1080 Add File | Create Folder

Step 2: Clicking on the Create Folder Link

From this page, you have the option to create folders and add documents.

The **Repository Location** dropdown menu gives two options:

- **NonSearchable**: the option to select for adding forms to your library.
- **Repository**: the option to view all documents in the library and any documents previously attached in a COMMBUYS transaction.

We will keep **NonSearchable** as the default and begin creating a document library.

Click on the **Create Folder** link.

Attachment Repository - Create Folder

Location: 1080
Folder Name * Bid Attachments

Save Cancel

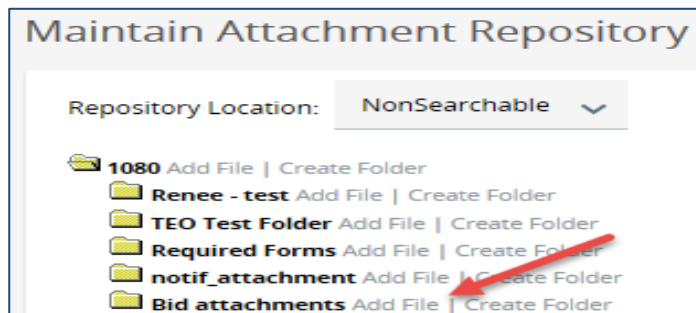
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Step 3: Creating a Folder

After clicking on the **Create Folder** link, enter a name for the folder. Folders will help you organize your library.

Naming conventions are strongly encouraged. Consistent naming conventions will make it easier for department's users to search for and locate documents.

Once a Folder is created, it cannot be removed. Once complete, click on the **Save** button.



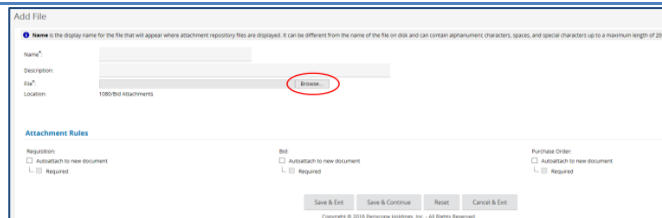
Step 4: Adding a File

Now that a folder is created, documents (files) can be added. Documents can consist of standard documents such as terms and conditions, supplier diversity, or standard forms.

When adding a document, a name and description will be entered.

Once a document is uploaded, it cannot be edited within the Library or Repository. An uploaded document cannot be replaced or overwritten. This makes the description and naming all-the-more critical. Not only do you want to ensure that your users are able to facilitate an accurate search for the document, but you want to make sure that users will always select the most up-to-date document.

Click on the **Add File** link next to the folder to which you want to add a file.



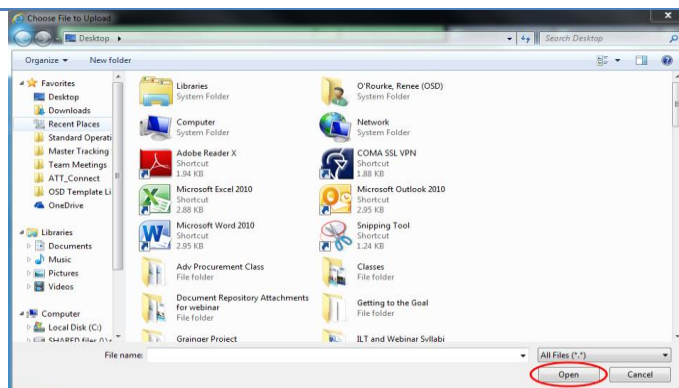
Step 5: Browsing for a File

The **Add File** page displays. Items marked with an asterisk (*) are required fields.

Here you can browse your computer's folders for any documents/files you want to add.

We will first find the file we want to attach by clicking on the **Browse** button.

NOTE: If using the Chrome browser click on the **Choose File** button.



Step 6: Selecting a File

The Browse button opens the **Upload File** window on your computer.

Select the file you want to add to the folder by clicking on it to highlight it and then click on the **Open** button.

Add File

Name is the display name for the file that will appear where attachments are listed. It can be different from the name of the file on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 255.

Name*: Commonwealth_Terms_and_Conditions.doc

Description: Terms & Conditions

File*: S:\Train_Q4\Training\ALL Instructor Led Sessions\Buyers\CB Procurement Class Browse...

Location: 1080-Bid Attachments

Attachment Rules

Requisition <input type="checkbox"/> Autoattach to new document <input type="checkbox"/> Required	Bid <input checked="" type="checkbox"/> Autoattach to new document <input checked="" type="checkbox"/> Required	Purchase Order <input type="checkbox"/> Autoattach to new document <input type="checkbox"/> Required
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Save & Exit Save & Continue Reset Cancel & Exit

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Step 7: Saving the Attachment

If needed, rename the file, then add a description that will make it easier for users to search for this particular file. It is suggested that you include some type of version or date to ensure that users are using the most up-to-date document/file.

This file will now be in your Document Library and can be used by any user to search.

Attachment Rules: Clicking on the **Autoattach to new document** checkbox allows you to set up documents to automatically attach to a bid, requisition, or purchase order.

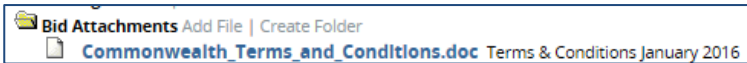
You can also choose to designate the document as required by clicking on the **Required** checkbox.

- A required document cannot be deleted from a transaction.
- A non-required document may be set up to auto-attach, but it may be deleted from the COMMBUYS transaction.
- No edits can be made to the files/documents within COMMBUYS therefore we recommend that any file you wish to auto-attach should not require any updates or edits.
- In-order-to make edits to the file, it would need to be downloaded from COMMBUYS, updated, and then uploaded.

NOTE: By uploading files/documents to your Organization's library, users will be able to search for those documents and download them for editing to use when purchasing or procuring.

To auto attach the Terms & Conditions document to Bids, click on the **Save & Exit** button.

Screenshot



Directions

Step 8: Verifying the Saved Attachment

The document now displays in the folder.

Repeat as necessary.

Just looking at the document(s) in the Document Library (Attachment Repository), you cannot tell if rules have been set up. You have to click on the blue link to open up the file and check for attachment rules. From there you could add or remove attachment rules if necessary.

Click on the blue **file hyperlink** to open up the file.

Step 9: Adding More Attachments

Once in the file, you can add additional attachment rules or remove previously set rules.

Here you could also download the file and modify it if necessary, and then attach a new version with a new title. This would be accomplished by clicking on the download



icon.

