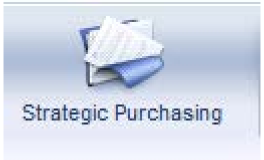
Exercise 3

Add Attachment to a Contract

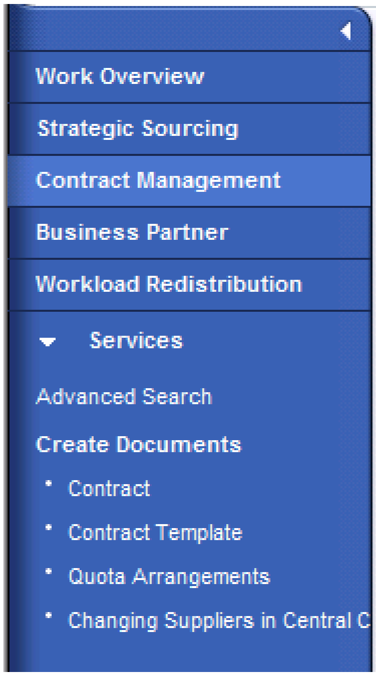
Exercise 3: Add Attachment to a Contract

1. Log into SRM.

2. Click on the 'Strategic Purchasing' folder at the top of the page.



3. Then click on 'Contract Management' located on left-hand side of the blue menu bar.



4. Under the **'Active Queries'** heading, click on **Central Contracts 'All'.** This will generate a list of all active contracts regardless of their status.

5. Click **"Show Quick Criteria Maintenance"** to search for the contract you created in Exercise 1. Enter the contract number in the **'Number'** field and click **'Apply'**.

6. Click on the contract number to open the contract.

7. Click **'Edit'**

8. Click on the **'Notes and Attachments'** Tab.

9. Click on **'Edit'**

10. Click on **'Add Attachments'** in the attachment section. This will open a pop-up window - '**Add Attachment**'.

11. Select **'General Data'** in the '**Assign To'** drop down menu.

12. Click **'Browse'** to search for the document you want to add. Find the amendment document on your hard drive/network drive, select the document to add and click **'Open'.**

13. To allow the document to be published to the internet, uncheck the Visible Internally only box. Click **'OK'.**

14. The file name will appear as the description of the attached document. To update the description, select the document and click **'Edit Description'.** Enter the **'New Description'** and click **'OK'**. NOTE: The Description is the title of the document published on the internet.

15. In the **'Attachments'** section under the column titled '**visible Internally only'** check the boxes for the documents you want to be internal only, as all other documents will appear on the internet once the contract is released.

16. Click **'Release'** to update the contract and publish any documents.