

Step-by-Step Guide

Adding comments, notes and attachments



In This Guide

This guide demonstrates how to add comments, notes and attachments to documents. You have the ability to add additional information to any requisition, purchase order or invoice. Comments are typically used as a communication tool between **CrimsonCorner** users. For example, an approver may use comments to ask a requester about a requisition prior to approval. Notes and attachments provide additional information about the requisition and can be sent to **CrimsonCorner** users or the supplier. An example of an external note or attachment might be a quote number or a copy of the quote that you want to send to the supplier to fulfill your order.

This guide discusses:

- ✓ Adding comments
- ✓ Adding external notes and attachments
- ✓ Adding internal notes and attachments
- ✓ Sending email notifications

Procedure

1. From the **CrimsonCorner** home page, access your requisition. If you are an approver you can access your requisitions by navigating to the **Action Items** section and selecting **Requisitions To Approve** or from the main navigation bar click **Orders & Documents » Approvals » My Approvals**.
2. If you are a requester, select your shopping cart by clicking **Shop » My Carts and Orders » View My Orders (Last 90 Days)**.
3. Open the document, click on the **Comments** tab and click the **Add Comment** button.
4. Notice that if comments have already been made against this document, you will see them listed here.
5. If you only want to add a comment to the document and not send the comment to anyone, add your comment and click the **add comment** button.
6. To send the comment to a user, choose from the list of available users already tied to the document or select another person by clicking on the **add e-mail recipient** link.
7. Type in the person's name and click the search button. Choose the correct person from the names available and click **select**.
8. Enter the comment and when you have finished, click **add comment**.
9. Please note that you can also attach files through comments if necessary.
10. If a user has been selected to receive the comment, the system will send the selected user an email with a link that directs them to this document's comment area to view and reply. The user would click the **reply to** link in their response and choose you as the recipient. Then you would receive an email notifying you that

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they had replied to your comment.

11. You also can attach notes and attachments to the requisition before it is submitted.
12. The Internal and External Notes and Attachment boxes will allow users to create notes and upload attachments to the requisition.
13. Internal notes and attachments will only be seen by users of **CrimsonCorner**.
14. External notes and attachments are for the suppliers. Please use caution when adding external notes or attachments as unnecessary information sent to the suppliers may slow down the order fulfillment process.
15. To add internal or external notes and attachments, open a requisition and select the summary tab. Scroll down to the **internal or external notes and attachments** sections.
16. To add a note, click the **edit** button. Enter your notes and click the **Save** button.
17. To add Internal attachments, click the **add attachment...** link. Select the **Attachment Type** and click **Browse** to search for the attachment.
18. Locate the attachment and click the **Save** button.
19. If you need to add an attachment to the requisition after it has been submitted, you can do so by using comments and attaching a file.
20. All comments and attachments become part of the document history. All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) **MUST** be removed from documentation.