

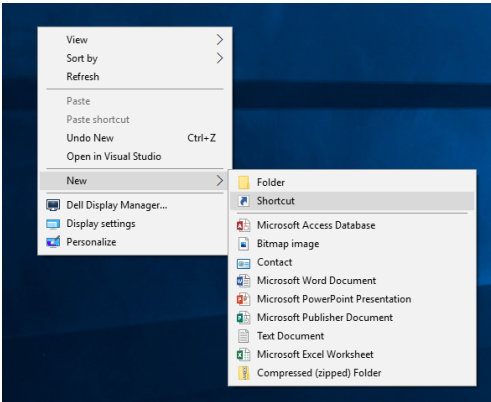


Document Submission Instructions for:

Square9 – Purchasing

One time task

Create a new shortcut by right clicking on an open area of your desktop. For location or path, enter \\sq9\Purch_Docs and click Next. Type the name you want for the icon (or leave the default) and click Finish.



What item would you like to create a shortcut for?

This wizard helps you to create shortcuts to local or network programs, files, folders, computers, or Internet addresses.

Type the location of the item:

Browse...

Click Next to continue.

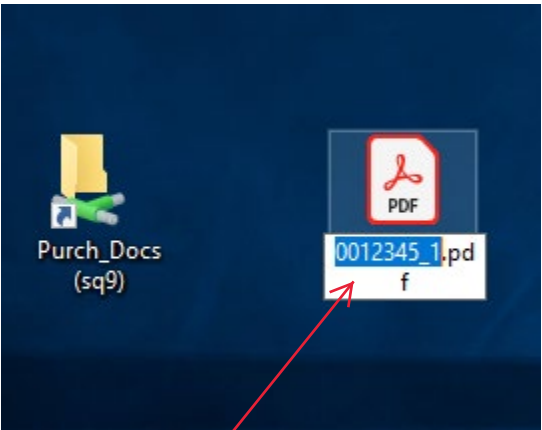
What would you like to name the shortcut?

Type a name for this shortcut:

Click Finish to create the shortcut.

To Submit a Document to Square9

Rename the selected document to the Purchase Requisition number including the leading zeroes and add an underscore symbol followed with a number based on the following table. The number signifies the document type.



Example: Requisition #12345
rename to 0012345_1

| | |
|----|-----------------------------------|
| 1 | Quotes/Invoices |
| 2 | Contracts/Agreements |
| 3 | COI Insurance |
| 4 | PO & BPO |
| 5 | Communications |
| 6 | Board Document |
| 7 | Fully Executed Agreement i.e. ICA |
| 8 | PWC-100 |
| 9 | Bid Documents |
| 10 | Other Documents |
| 11 | Receiving |
| 12 | Approvals |
| 13 | Change Order Back Up |

Drag the file to the folder. Within the folder, the file will disappear after a few moments. This means your file was successfully uploaded to Square 9.

Direct Method from email

Right click on an email attachment and select Save As. Select the Purch_Docs folder/shortcut as the destination and rename the file as indicated in the previous step. This method will not leave copies of the file in your computer.

To Submit a Document using a copier

When scanning a document on a copier, select Purch_Docs as the recipient. If you don't see such recipient, please contact the Help Desk to create a request for ITSS/CTSS to configure add the recipient to the copier.

Click on the "File Name/Subject Name/Other" tab.

Click on the File Name area and use the "C" button to clear it. Then, type the File Name as indicated previously (you may need to use the Shift key to find the underscore symbol) and click "OK".

Click "OK" and then the "Start" button.

The document will appear in Square9 in a few minutes with all the PR/PO information in place.

