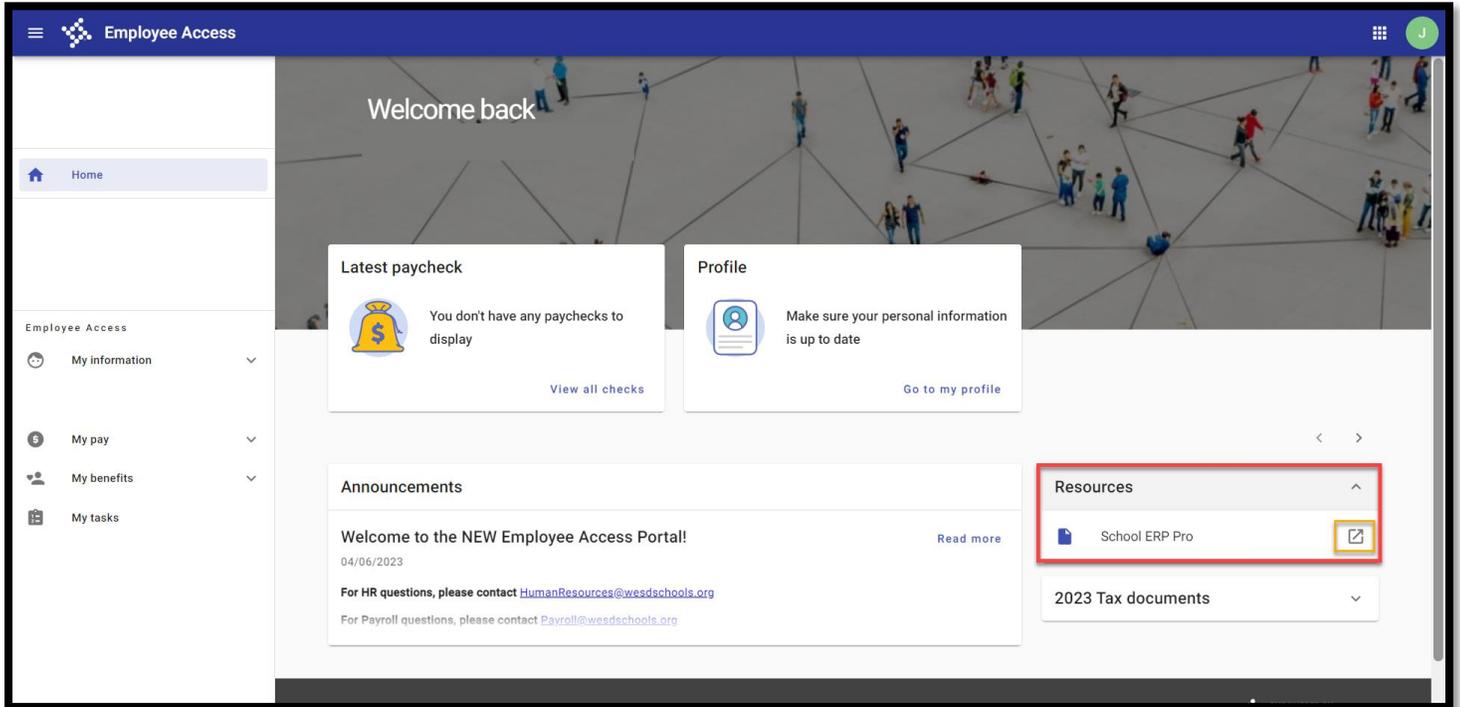


How-To Attach in TCM

For assistance, please contact SchoolERPSupport@wedschools.org

STEP 1: Login to School ERP Pro through Employee Access Portal (<https://tyler-waesdtaz.okta.com/>)
*Employee Access Portal can also be access by WESD website > Staff > Employee Access – School ERP Pro



STEP 2: Click on “Hamburger” Menu next to My Dashboard



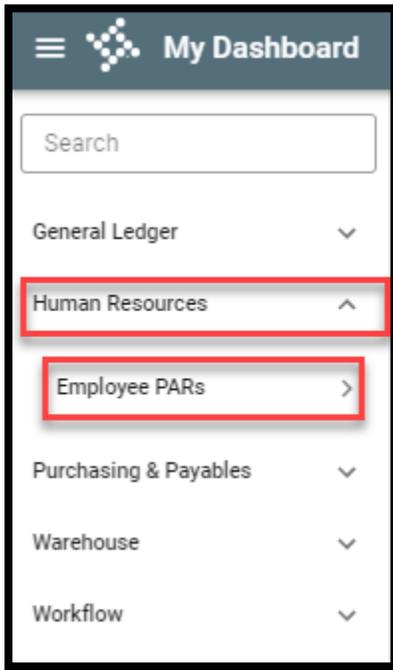
To attach documents to EPAR – Follow Steps 3-6

To attach documents to Vendor Requisition – Follow Steps 7-9

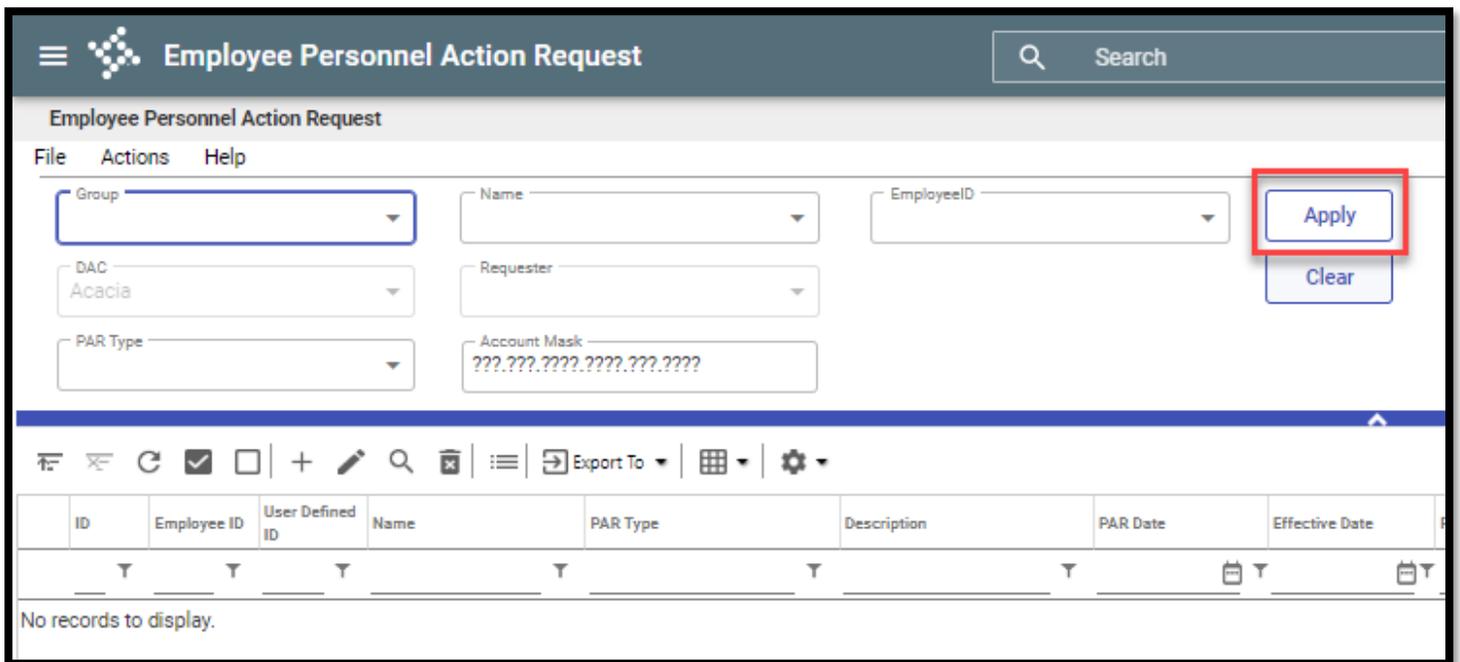
To attach documents to Warehouse Requisition – Follow Steps 10-12

****The recommended file(s) that can be attached are PDF, Excel, and Word****

STEP 3: For **EPAR** Document Attach - Click on Human Resources > Employee PARs > PARs



STEP 4: Search for **EPAR** utilizing Filter Criteria at the top or Click **APPLY** > double click to open **EPAR**



STEP 5: When **EPAR** is open, go to Actions > Manage Documents

Employee Personnel Action Request

Add ePAR

Actions Help

Manage Documents

Get Applicant

Type: New Hire Assignment

Date Entered: 05/10/2023

Completed HR

Requester

Status: New

Completed PR

JOB SELECTION

Record ID: 1481, DAC: Acacia, Position Type: IA - Regular Ed, Control Code: 1249, Description: Head Start Support Instruct

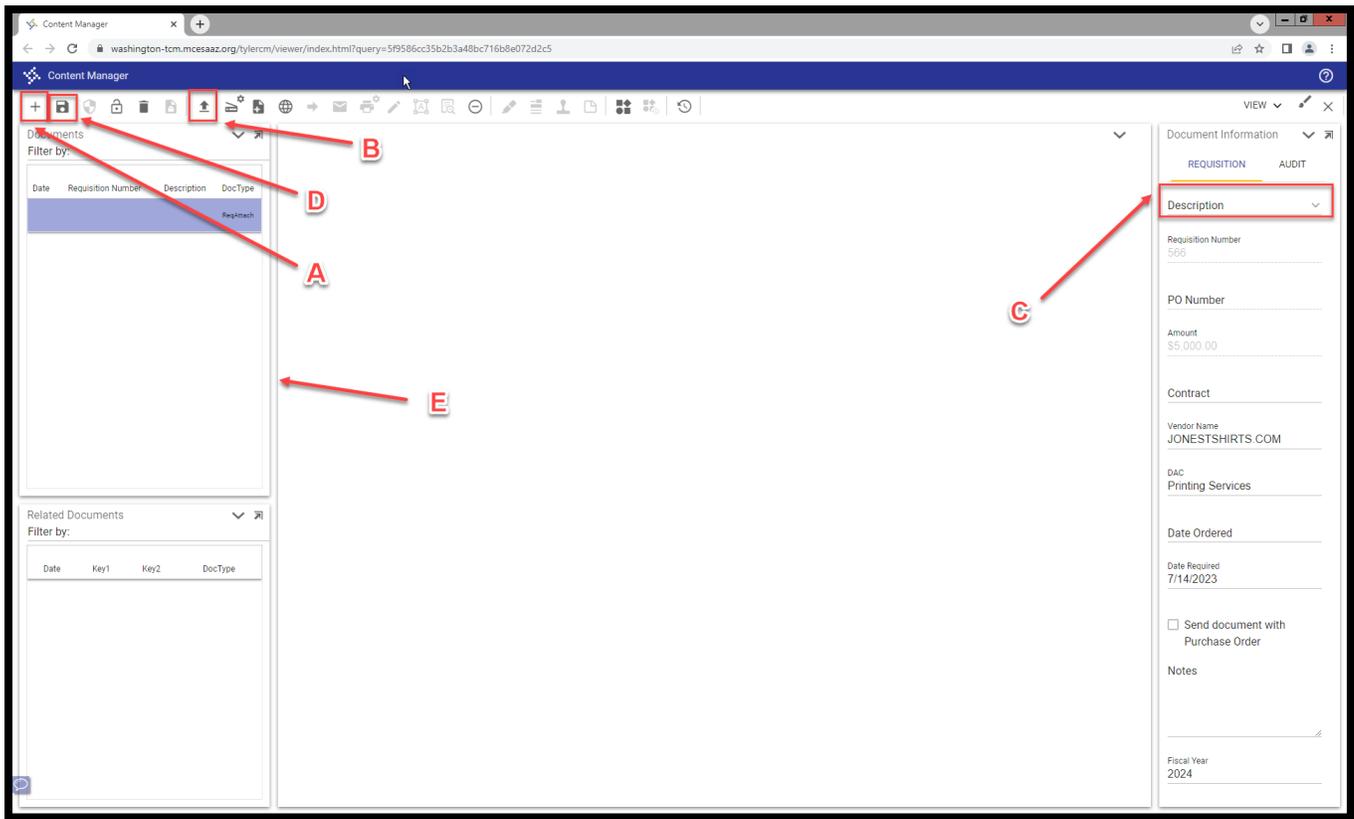
PAR INFORMATION | ADDITIONAL INFORMATION | APPROVAL LOG | COMMENTS | REVIEW

Review the changes you've made, then cl

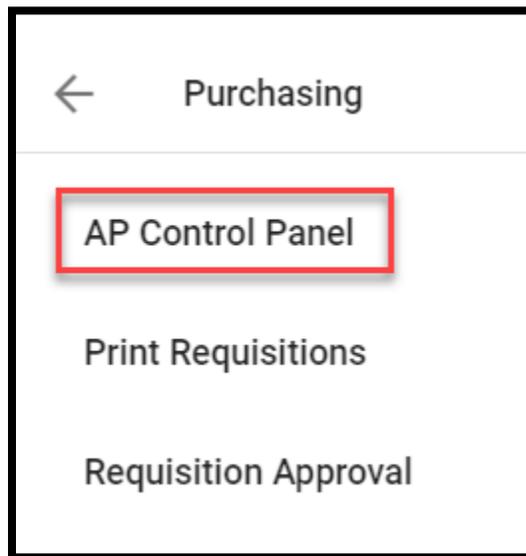
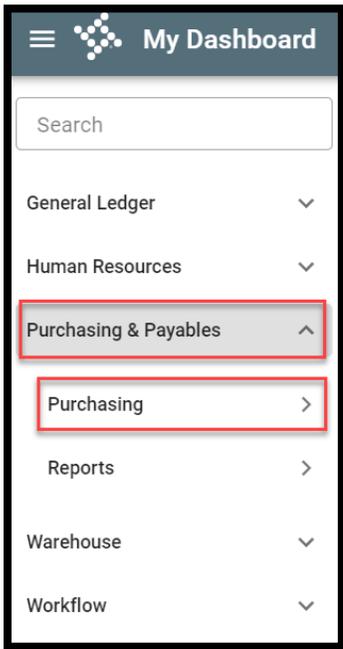
STEP 6: TCM will open in a separate browser window. To add attach a document, follow the steps below.

- Click the (+) to ADD a new document (nothing will pop up)
- Click the IMPORT button (separate window will appear asking to attach document)
- Change DESCRIPTION to indicate what the document is (ie: quote, shopping cart, invoice, etc.)
- Click the SAVE (floppy disk) button
- Once document has been saved, it will appear under the DOCUMENTS box

****Once a document has been SAVED, it cannot be deleted! If a document has been attached in ERROR and SAVED, click on the document in error, change DESCRIPTION (ie: do not use, incorrect doc, etc.) and click SAVE.**

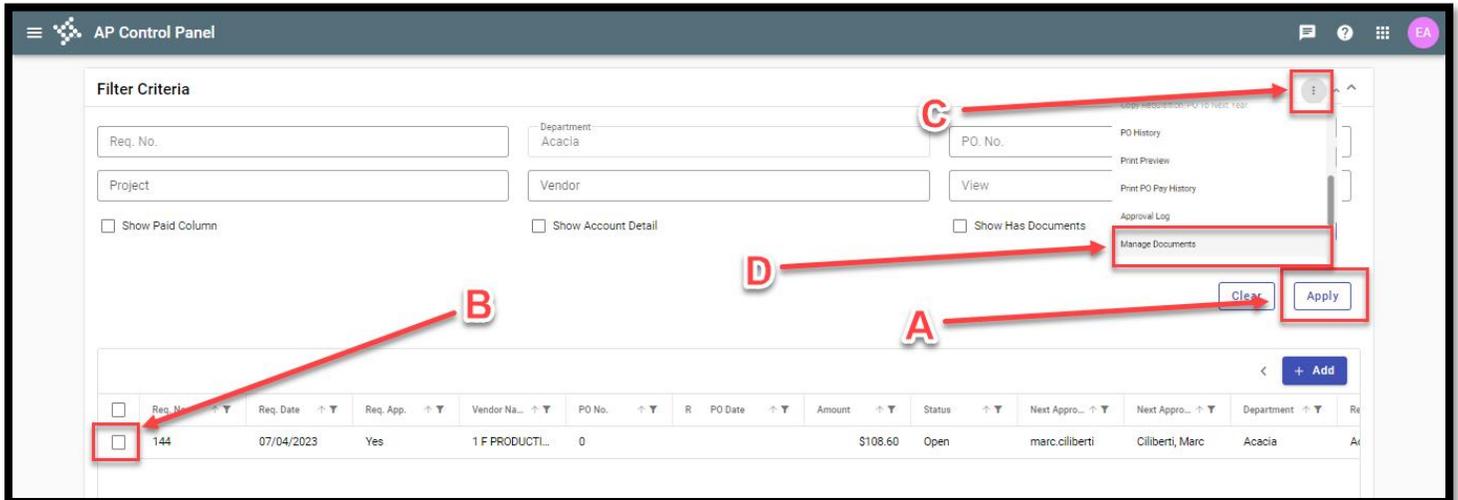


STEP 7: For **Requisition** Document Attach - Click on Purchasing & Payables > Purchasing > AP Control Panel



STEP 8: Search for **Requisition** utilizing Filter Criteria at the top or Click Apply to see all entered Requisitions

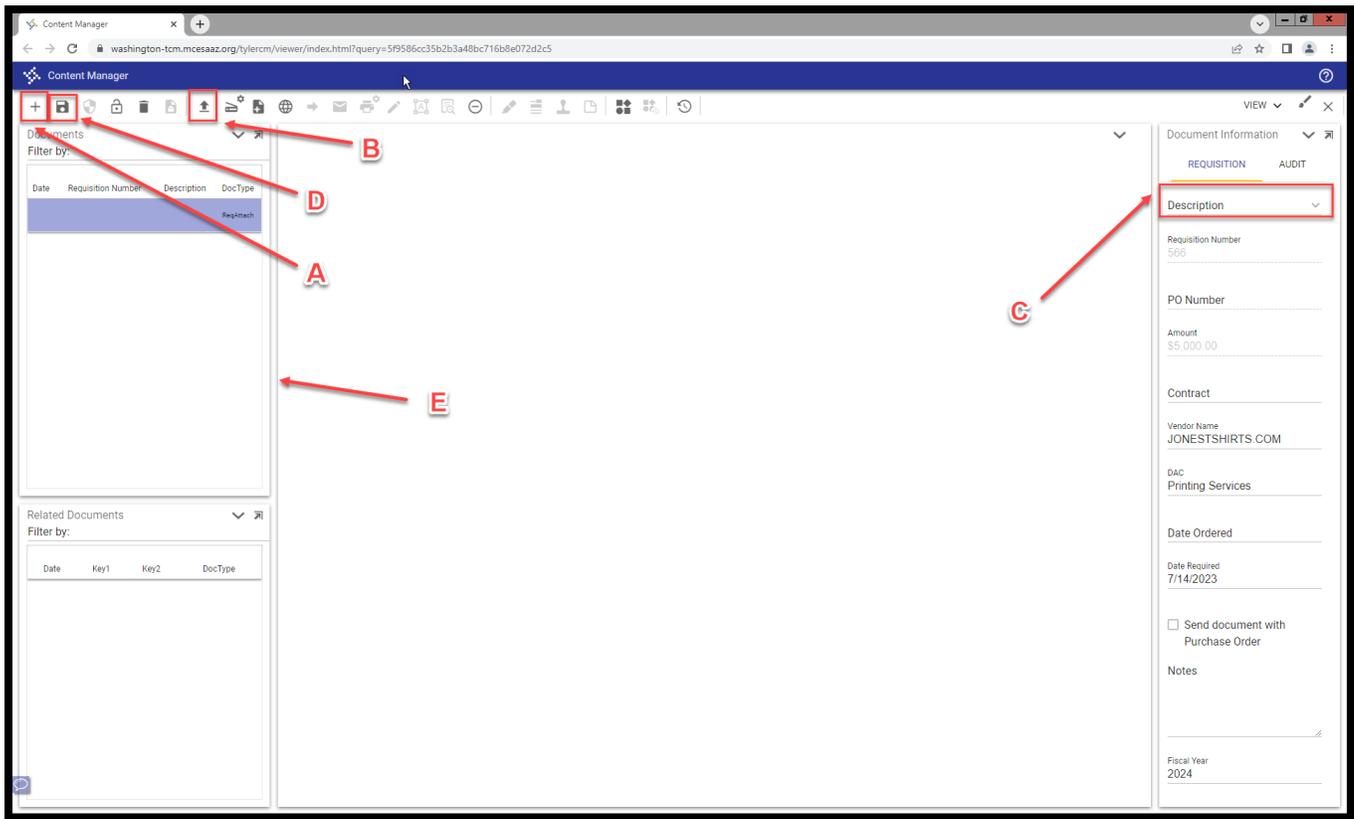
- A. Click Apply to bring up all requisitions that have been entered
- B. Check the box on the requisition that documents are needing to be attached
- C. Click the three dots (top right corner)
- D. Scroll down to find the Manage Documents



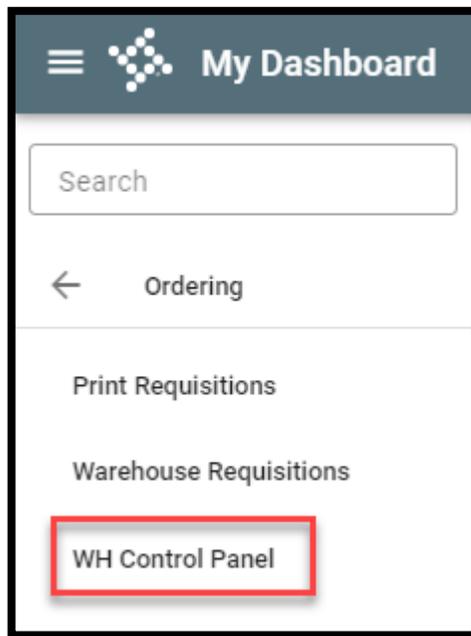
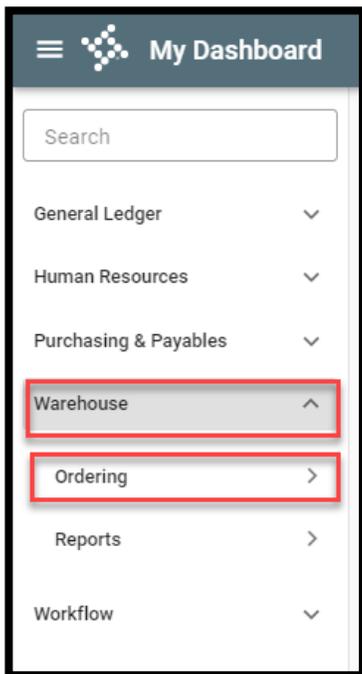
STEP 9: TCM will open in a separate browser window. To add attach a document, follow the steps below.

- A. Click the (+) to ADD a new document (nothing will pop up)
- B. Click the IMPORT button (separate window will appear asking to attach document)
- C. Change DESCRIPTION to indicate what the document is (ie: quote, shopping cart, invoice, etc.)
- D. Click the SAVE (floppy disk) button
- E. Once document has been saved, it will appear under the DOCUMENTS box

****Once a document has been SAVED, it cannot be deleted! If a document has been attached in ERROR and SAVED, click on the document in error, change DESCRIPTION (ie: do not use, incorrect doc, etc.) and click SAVE.**

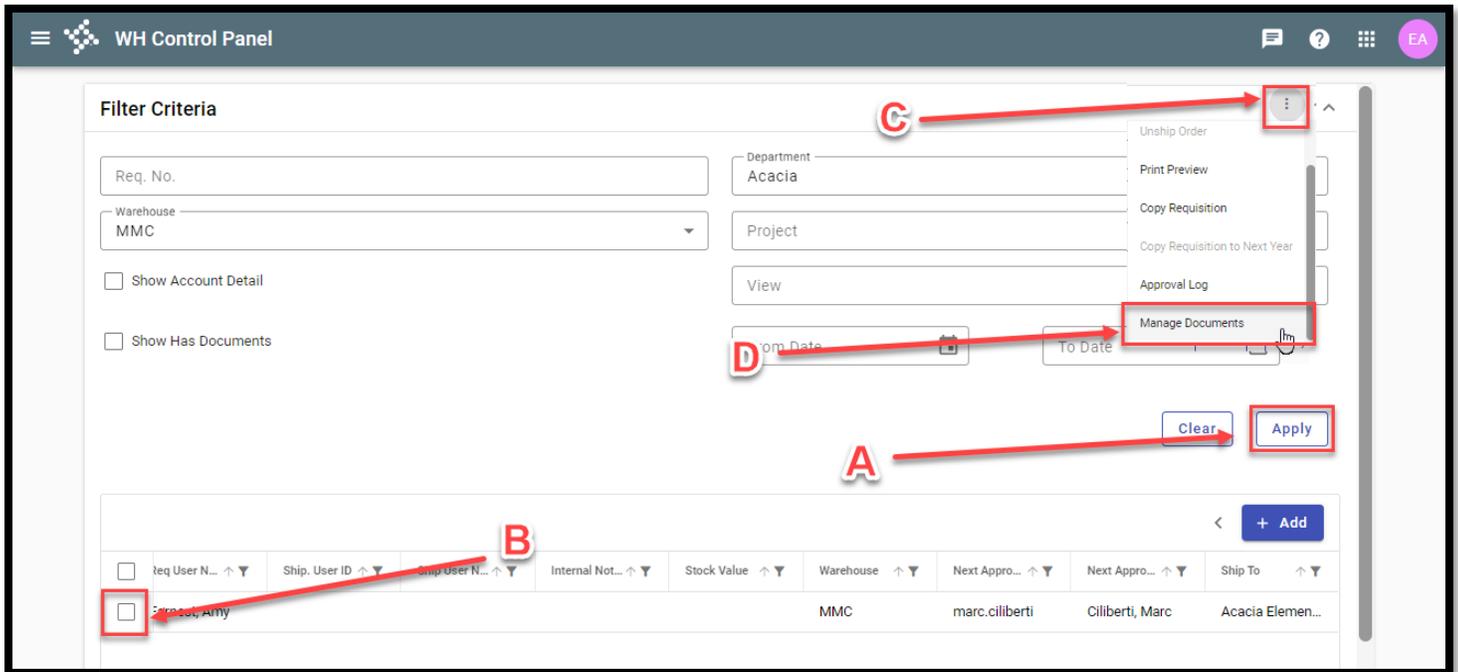


STEP 10: For **Warehouse Requisition Document Attach** - Click on Warehouse > Ordering > WH Control Panel



STEP 11: For Warehouse Requisition Document Attach - Click on Warehouse > Ordering > WH Control Panel

- A. Click Apply to bring up all warehouse requisitions that have been entered
- B. Check the box on the warehouse requisition that document(s) are needing to be attached
- C. Click the three dots (top right corner)
- D. Scroll down to find the Manage Documents



STEP 12: TCM will open in a separate browser window. To add attach a document, follow the steps below.

- A. Click the (+) to ADD a new document (nothing will pop up)
- B. Click the IMPORT button (separate window will appear asking to attach document)
- C. Change DESCRIPTION to indicate what the document is (ie: quote, shopping cart, invoice, etc.)
- D. Click the SAVE (floppy disk) button
- E. Once document has been saved, it will appear under the DOCUMENTS box

****Once a document has been SAVED, it cannot be deleted! If a document has been attached in ERROR and SAVED, click on the document in error, change DESCRIPTION (ie: do not use, incorrect doc, etc.) and click SAVE.**

Content Manager

washington-tcm.mcsaaz.org/hylercm/viewer/index.html?query=5F9586cc352b3a48bc716b8e072d2c5

Content Manager

VIEW

Documents

Filter by:

Date	Requisition Number	Description	DocType
			Req-mech

Related Documents

Filter by:

Date	Key1	Key2	DocType
------	------	------	---------

Document Information

REQUISITION AUDIT

Description

Requisition Number
566

PO Number

Amount
\$5,000.00

Contract

Vendor Name
JONESTHIRTS.COM

DAC
Printing Services

Date Ordered

Date Required
7/14/2023

Send document with Purchase Order

Notes

Fiscal Year
2024

The screenshot shows a web application interface for 'Content Manager'. At the top, there is a browser address bar and a navigation bar with various icons. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'Documents' section with a table and a 'Filter by:' dropdown. Below that is a 'Related Documents' section with another table and a 'Filter by:' dropdown. On the right, there is a 'Document Information' panel with tabs for 'REQUISITION' and 'AUDIT'. The 'REQUISITION' tab is active, showing fields for 'Description', 'Requisition Number', 'PO Number', 'Amount', 'Contract', 'Vendor Name', 'DAC', 'Date Ordered', 'Date Required', and 'Notes'. There is also a checkbox for 'Send document with Purchase Order' and a 'Fiscal Year' field. Red arrows labeled A through E point to specific elements: A points to the 'New' icon in the navigation bar; B points to the 'Refresh' icon; C points to the 'Description' dropdown menu; D points to the 'Description' header in the 'Documents' table; and E points to the main content area.