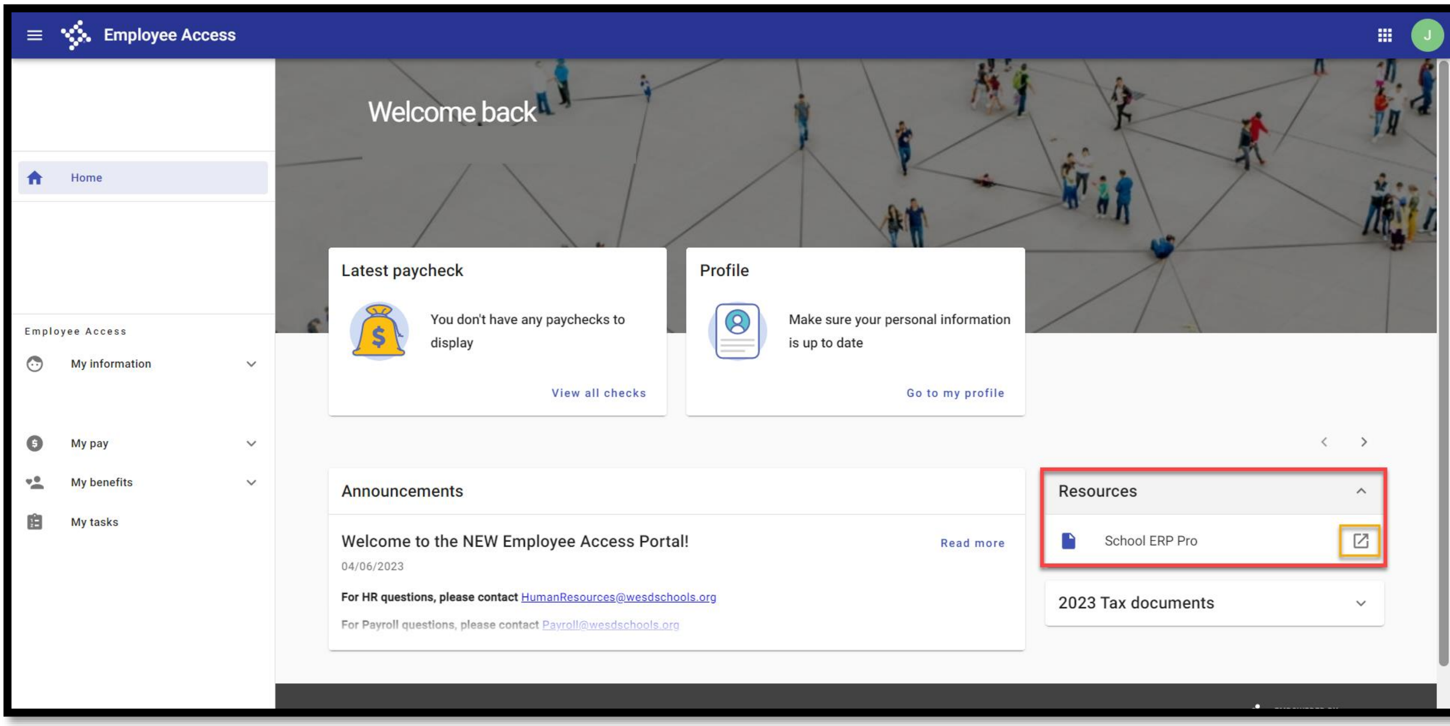
How-To Attach in TCM

For assistance, please contact SchoolERPSupport@wesdschools.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

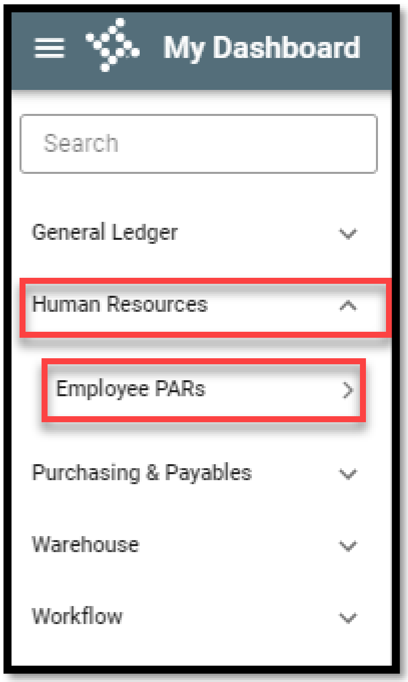
To attach documents to EPAR – Follow Steps 3-6

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

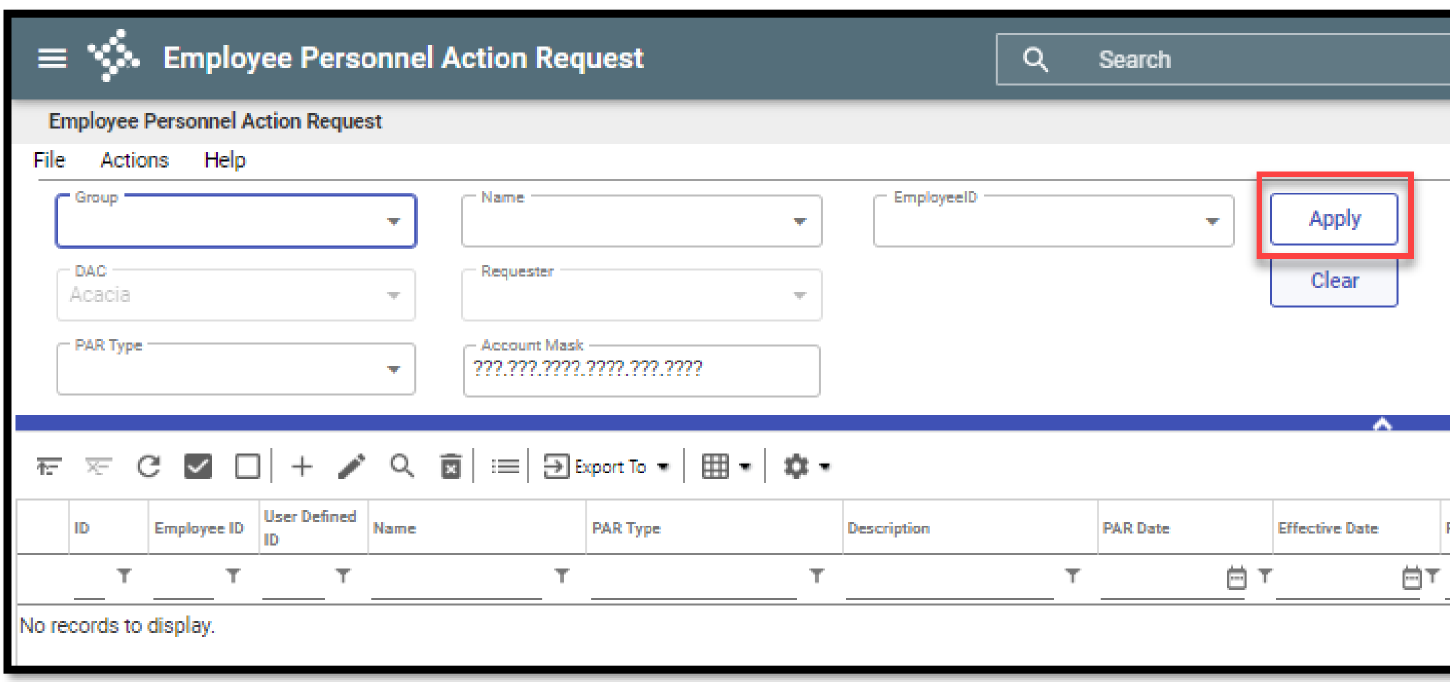
To attach documents to Warehouse Requisition – Follow Steps 10-12

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

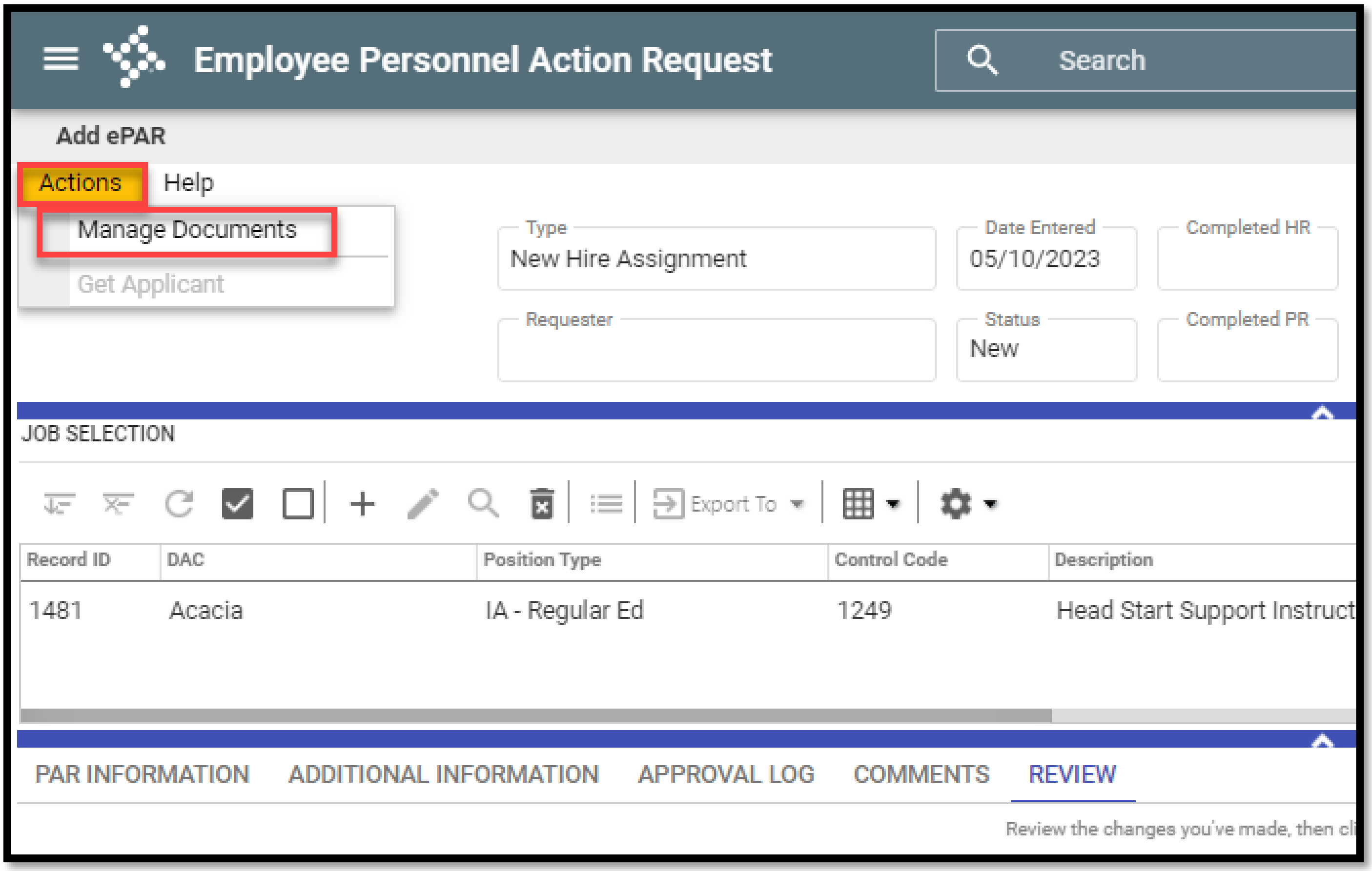
STEP 3: For **EPAR** Document Attach - Click on Human Resources > Employee PARs > PARs



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



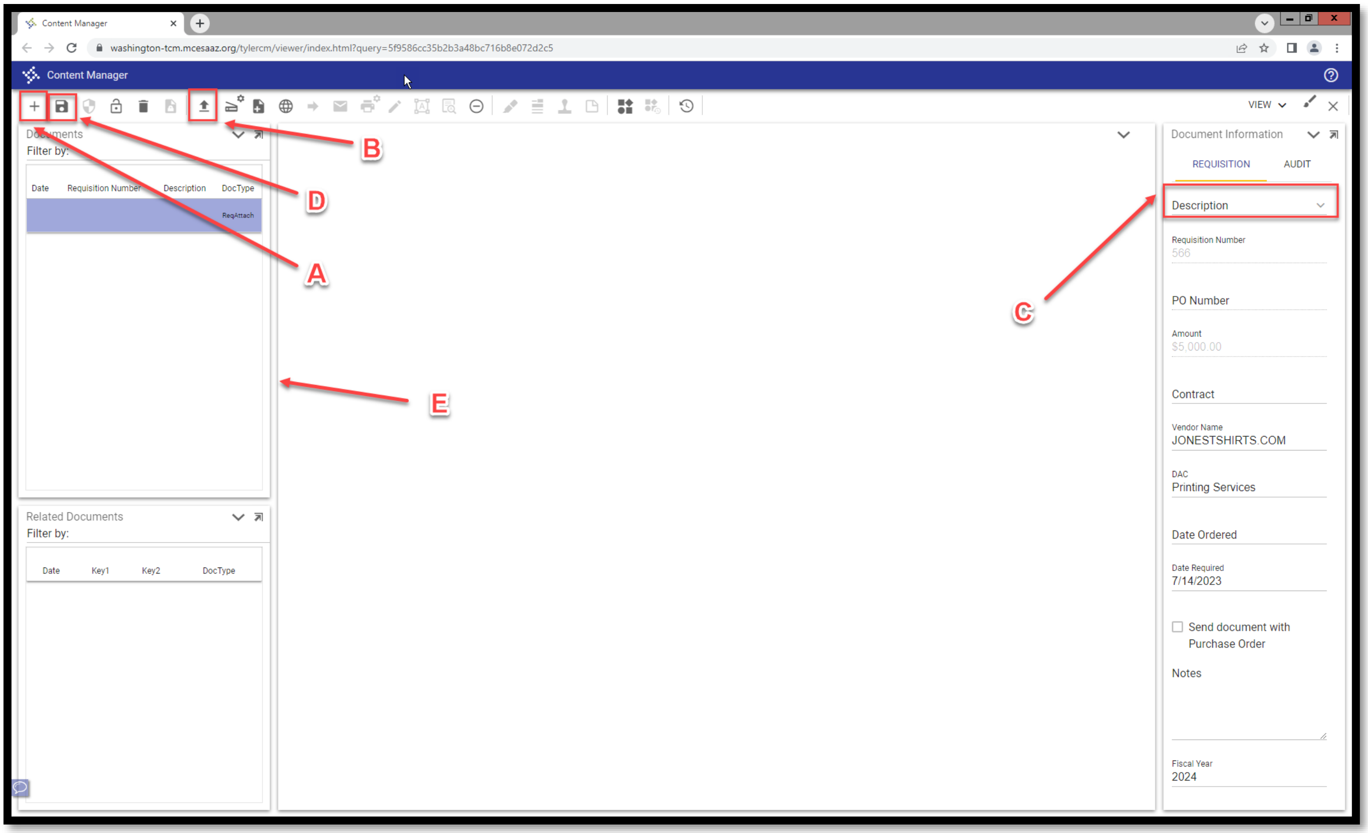
STEP 5: When **EPAR** is open, go to Actions > Manage Documents



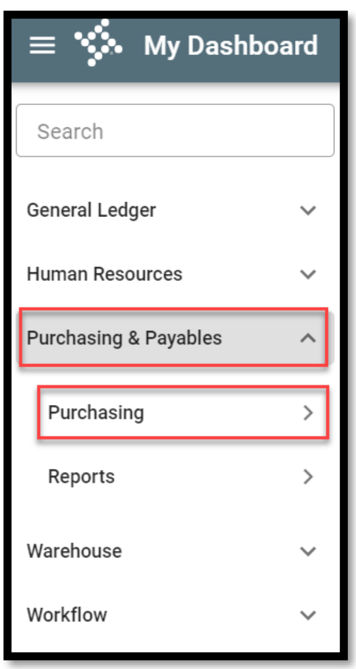
STEP 6: TCM will open in a separate browser window. To add attach a document, follow the steps below.

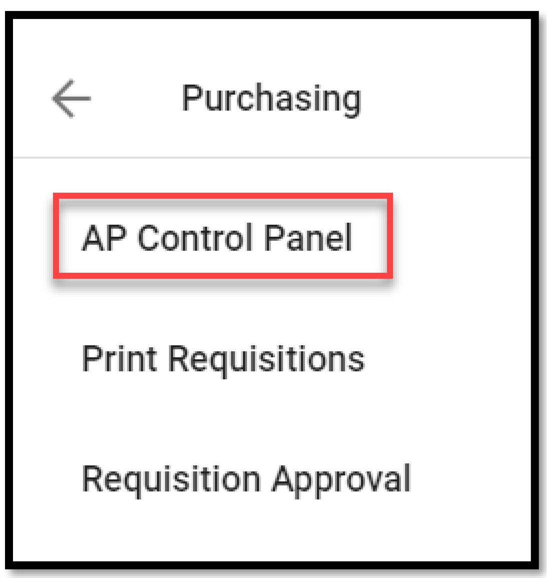
A. Click the (+) to ADD a new document (nothing will pop up)
B. Click the IMPORT button (separate window will appear asking to attach document)
C. Change DESCRIPTION to indicate what the document is (ie: quote, shopping cart, invoice, etc.)
D. Click the SAVE (floppy disk) button
E. Once document has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



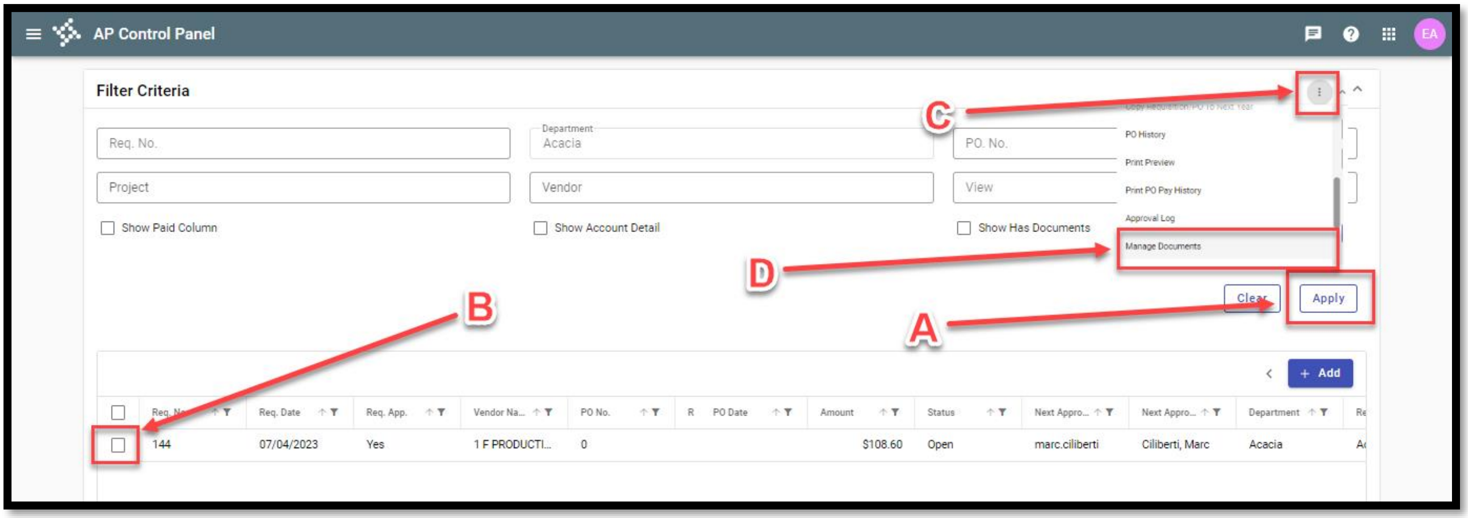
STEP 7: For **Requisition** Document Attach - Click on Purchasing & Payables > Purchasing > AP Control Panel





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.

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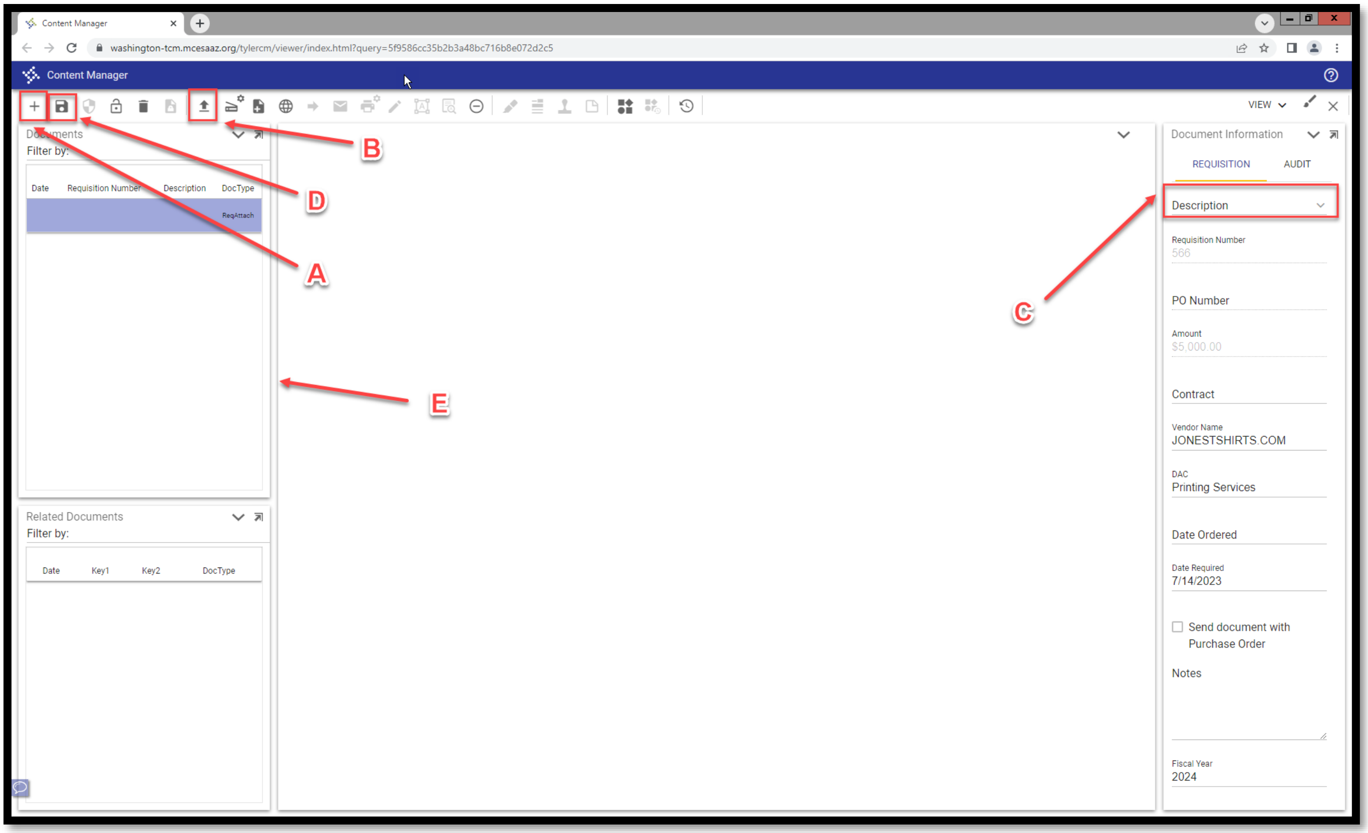
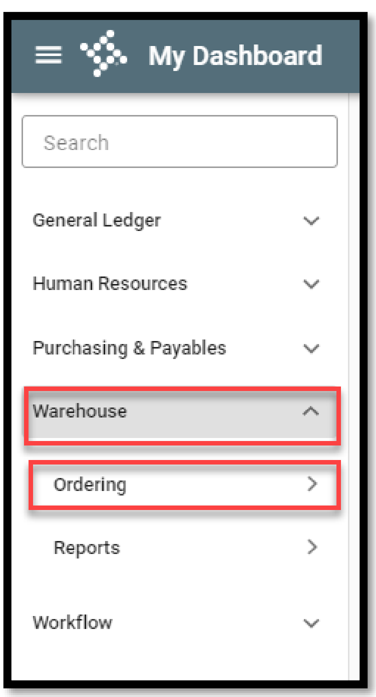
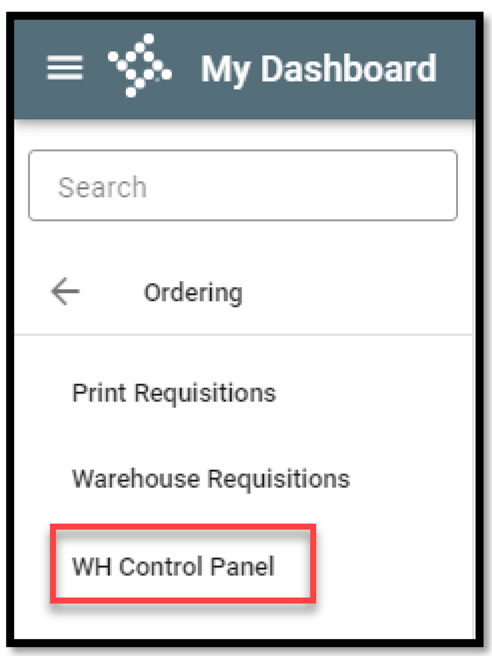


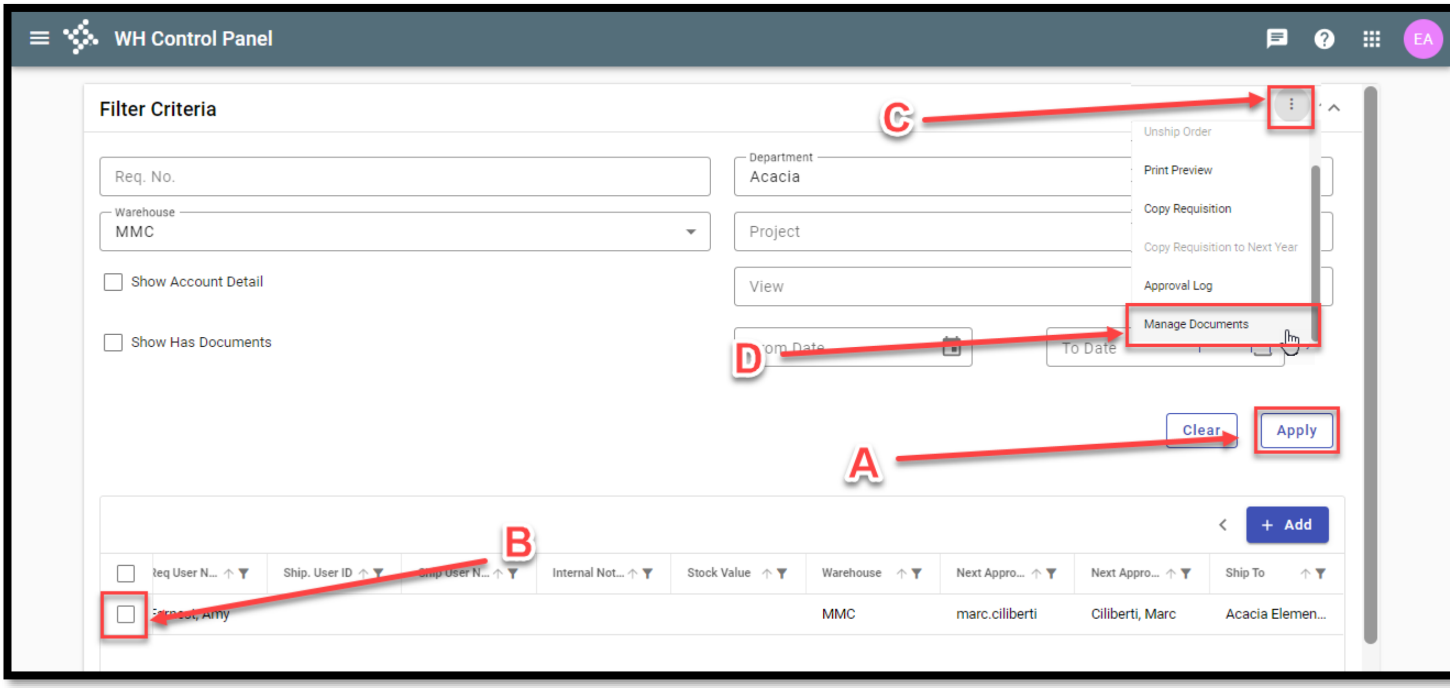
STEP 10: For **Warehouse Requisition** Document Attach - Click on Warehouse > Ordering > WH Control Panel





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



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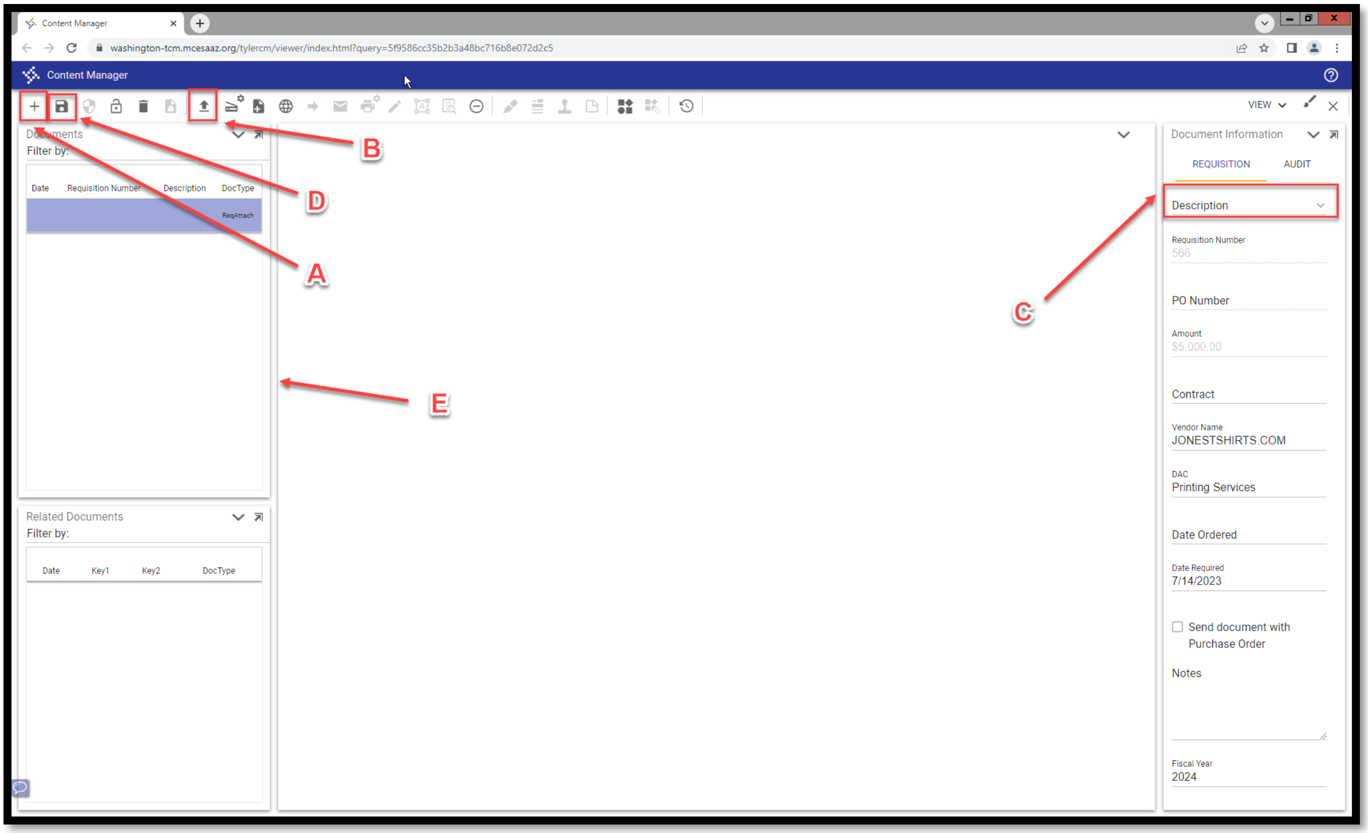
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