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**IT Training**

Information Services

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Paperclip

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INTRODUCTION

Paperclip is a tool that allows users to attach electronic documents to an order list, supplier details and transactions. They can then be viewed by other users in the system.

Most standard file types are supported and some can be previewed in the Paperclip screen. Word, Excel, PDF and text files are typical.

There is no limit to the number of documents that can be attached but there is a 2 Mb (2048 Kb) limit per file. This is sufficient for a large Word or PDF document.

Using Paperclip

Wherever you see a Paperclip toolbar button or see a paperclip column in a list view on a screen you can attach files. If an order/record has an existing attachment, then a paperclip will be displayed to the left of the record.

Figure 1



Process to attach a document

Order List Select a record

 Select the paperclip button

 Select the ‘Choose file’ button and navigate to the file

Attach File Select the file and click ‘Open’

Notes Type notes in the box under the ‘Choose file’ button

Attachment Visibility Will default to Public. Select from the dropdown menu. See table below

 Click to upload the document

|  |  |
| --- | --- |
| **Visibility** | **Description** |
| Public | All users can see this document |
| Sensitive | Only users in the security groups can view sensitive information |
| Public View\Sensitive Update | Visible to all users but cannot be changed |

Process to open, review and close a document

Order List Select a record

 Double click on the paperclip icon on the record line

Paperclip pane The Paperclip pane will open and display any attachments. See figure 2 below

Review Document Highlight the attachment and click the magnifying glass to review the document in the preview pane or right click over the attachment and select ‘Preview Document’ from the menu. See figure 2 below

 Click to close

Figure 2



Process to download a document

 Highlight the attachment and click the Download icon on the toolbar or right click over the attachment and select Download Document from the menu. See figure 3 below

Figure 3



Process to delete a document

Attachment Highlight the attachment and select the cross in the toolbar or right click over the attachment and select ‘Delete document’ from the menu

Figure 4



Process to view notes to an attachment

Paperclip pane Highlight the attachment

 Click the ‘View Notes’ icon or right click over the attachment and select View Notes. See figure 4 and 5 below

Figure 5



Figure 6



Related Document

Lists any attachments in the system where there is a link to the record you are viewing. This can be supplier transactions for the order being viewed or goods receipts etc

Figure 7





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