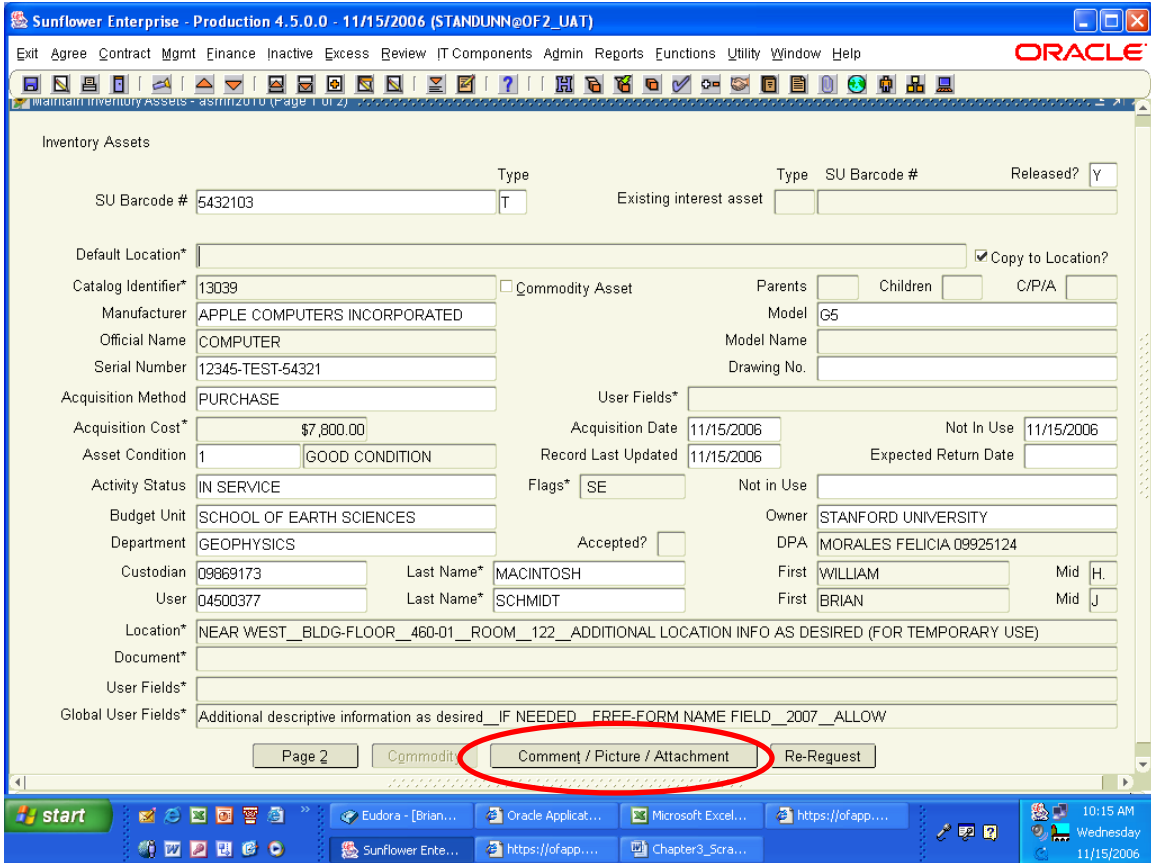


## Section 5

# Adding Comments and Attachments to Records

*Sunflower User's Guide*

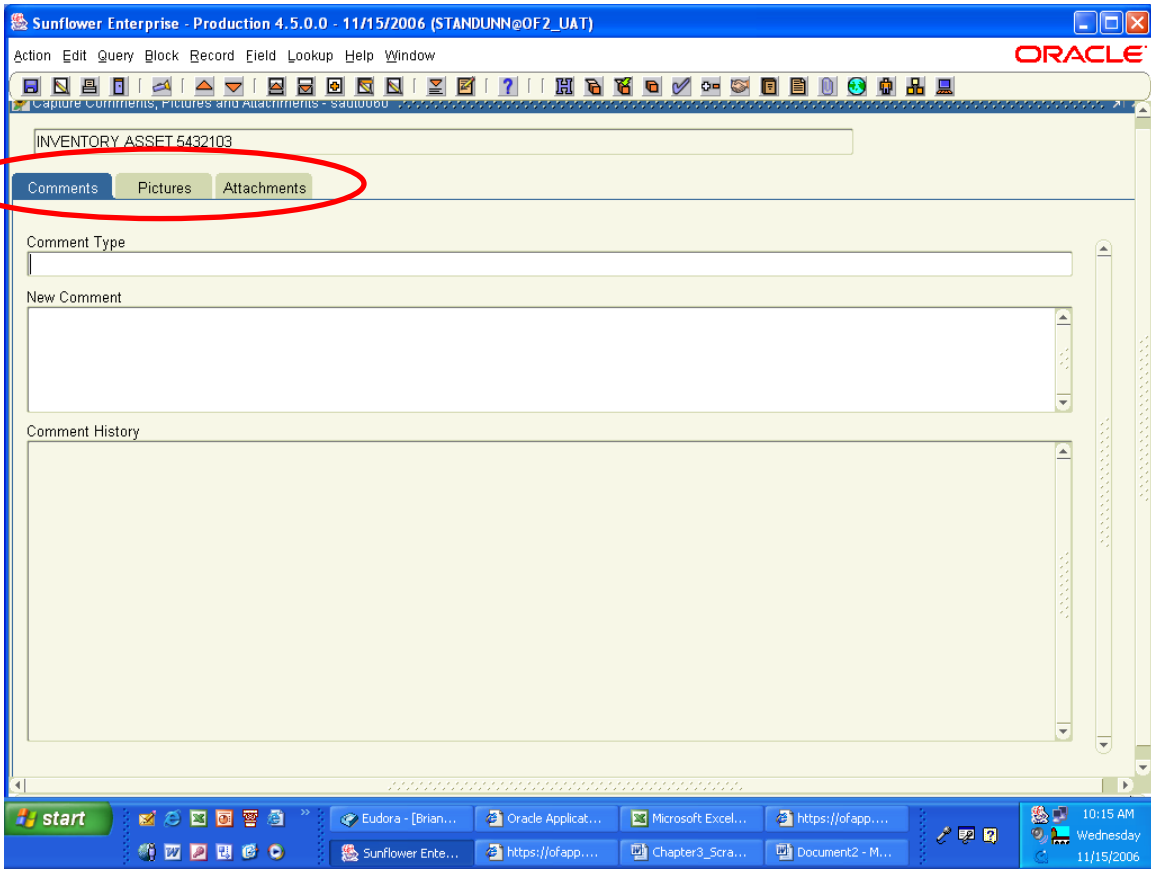
Revised November 2006



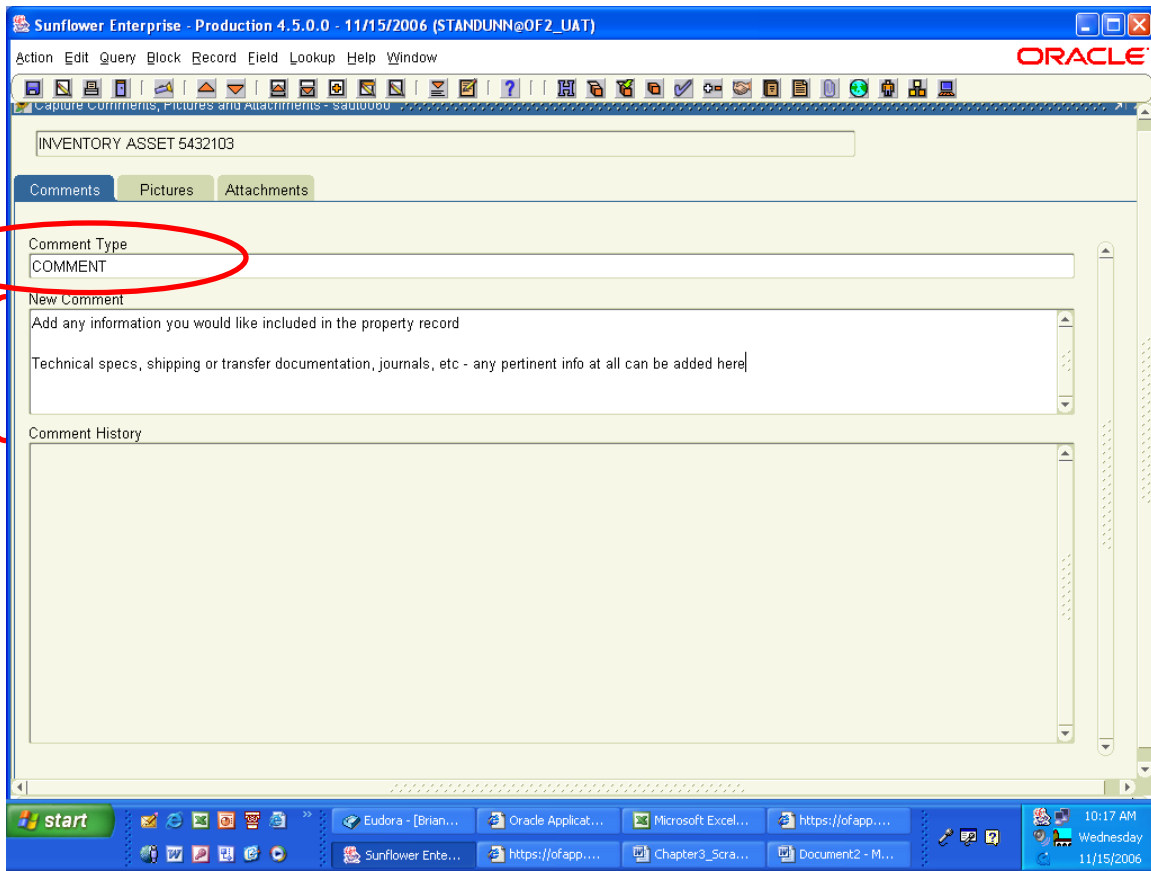
To add comments or attach pictures or documents to a property record, locate the record using Maintain Inventory Assets in the Mgmt menu.

When the record is open, click on the button at bottom center:

Comment / Picture / Attachment



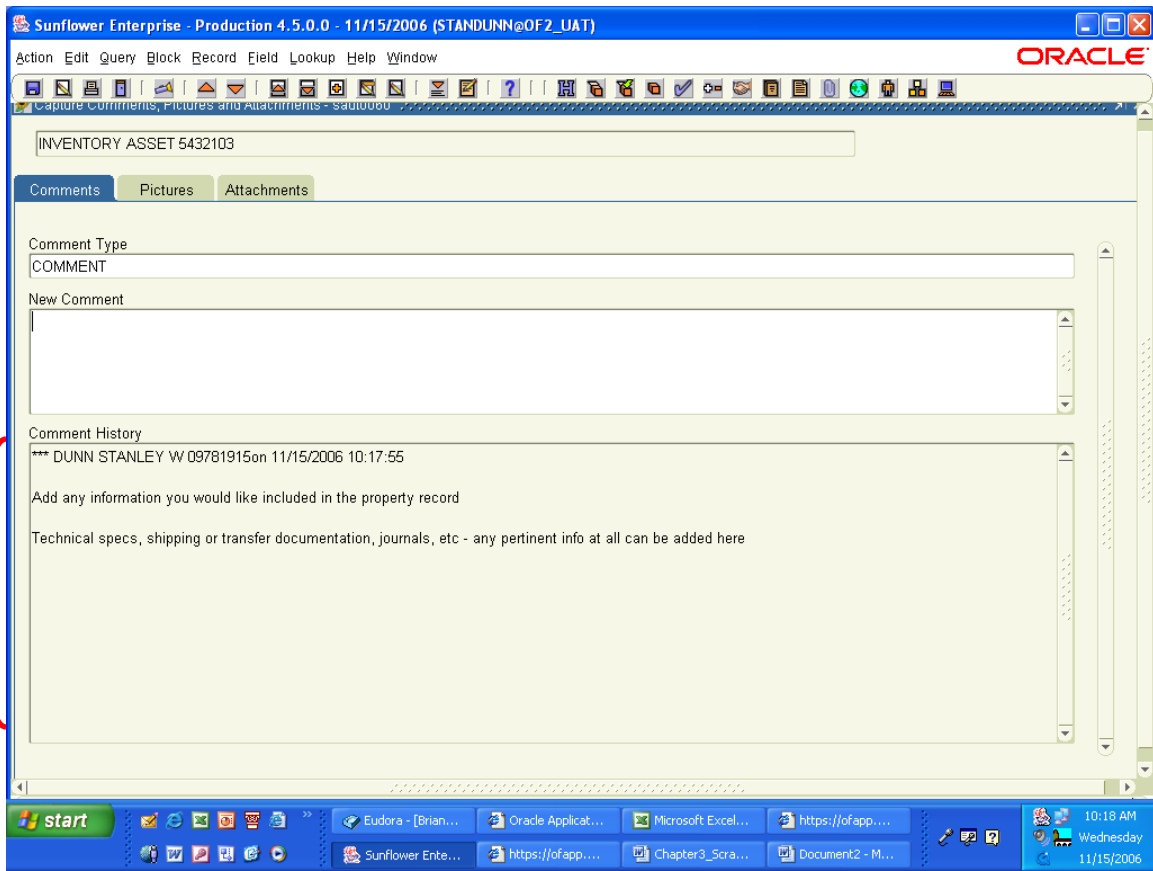
There are three tabs available, one for Comments, one for Photos and one for Documents. The system defaults to Comments.



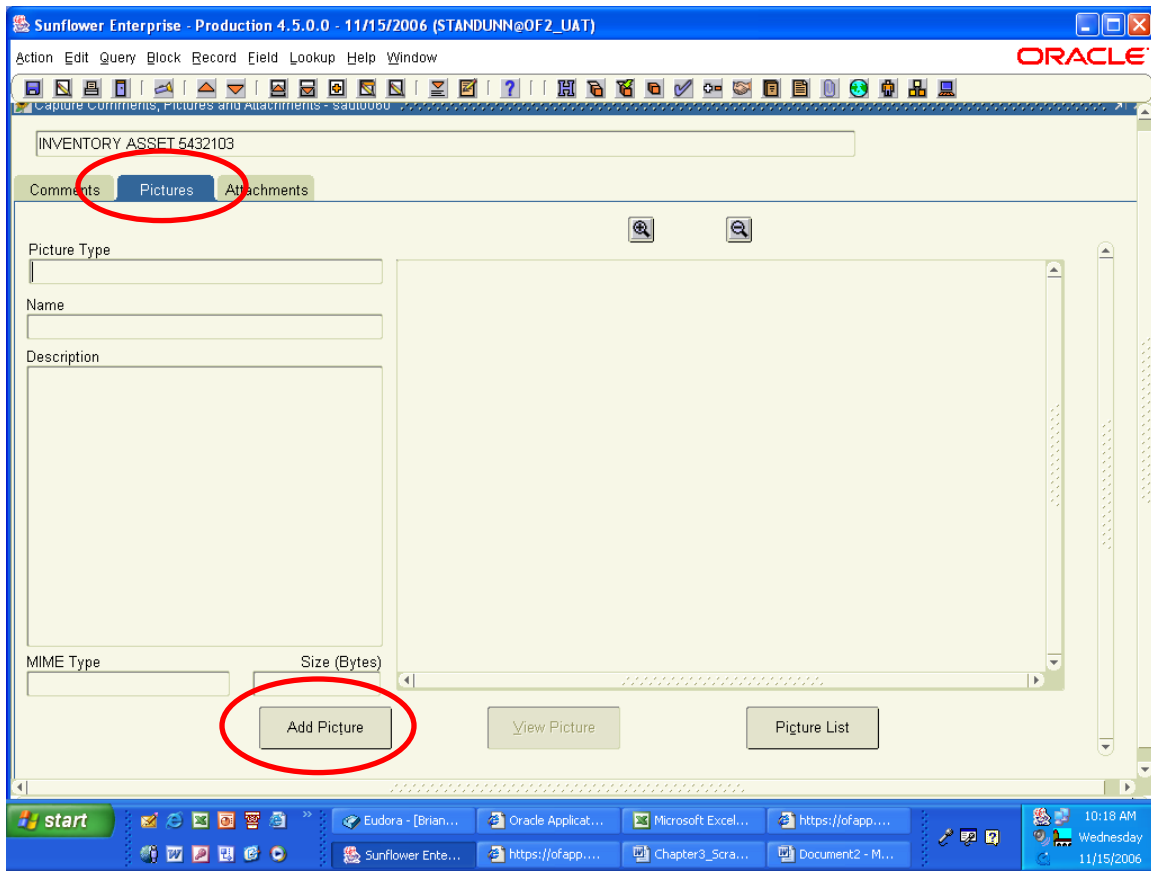
Type in the comment type, which can be either “Text” or “Comment” – for our purposes at Stanford, there is actually no difference between the two, and they can be used interchangeably.

In the box labeled “New Comment”, type in whatever comment you wish to add to the record. The comment field is available to use for any reason, and can vary from department to department as to what type of information is stored here. PMO makes no specific recommendations for the use of this field, other than to use it in any way deemed helpful.

Comments, once saved, cannot be deleted, so make sure any information entered here is not something you would want to remove at a later date.



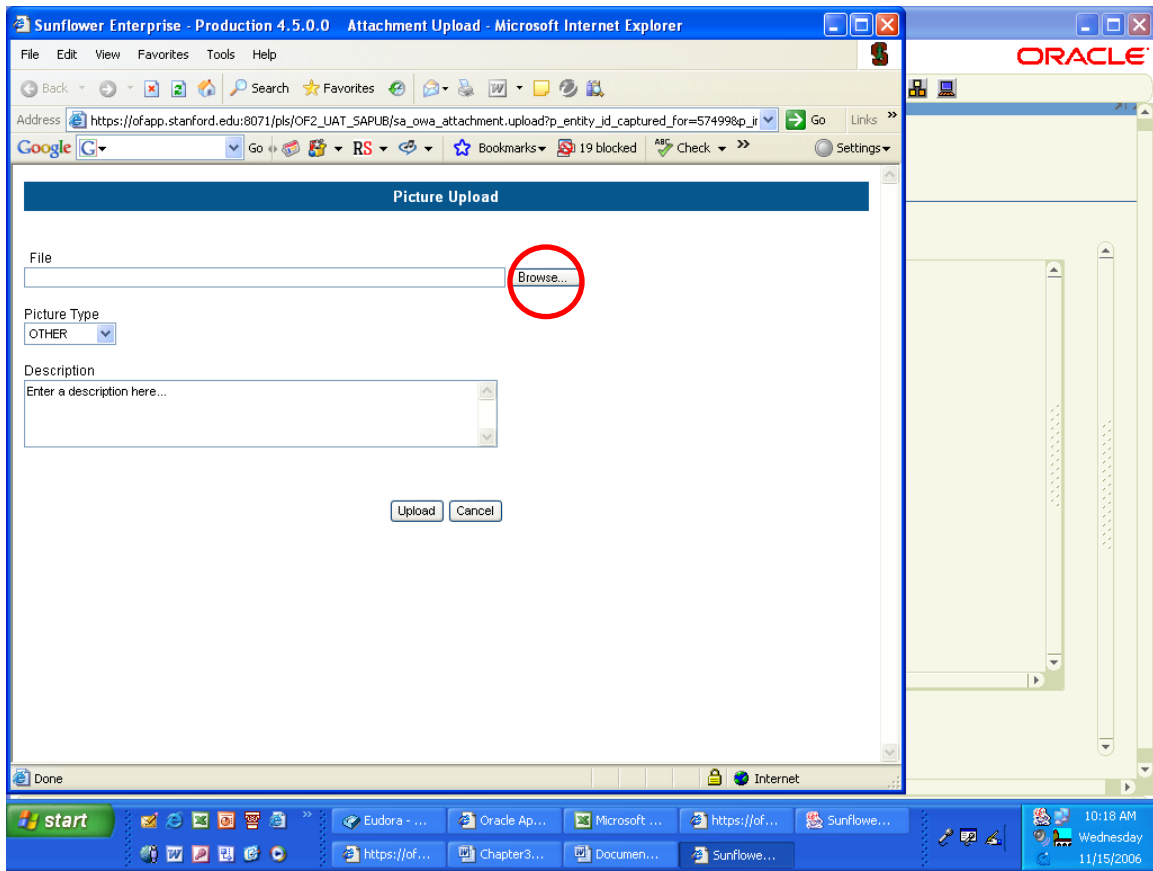
After you've entered and save a comment, entering the comment area later reveals the comment in the Comment History section of the window, along with the date, time and originator name of the comment entry.



To attach pictures of an asset, enter the Comments field, then click on the Pictures tab.

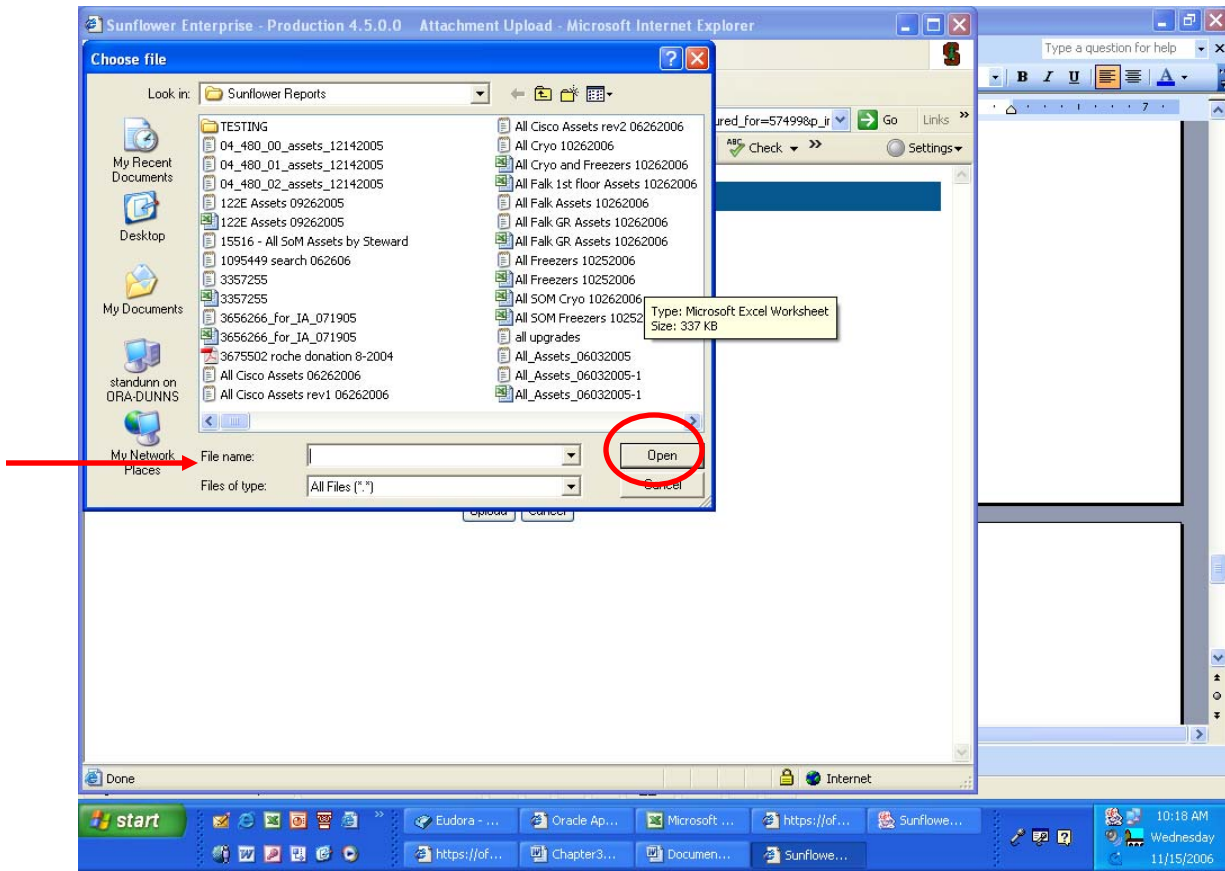
In the window that appears, there are fields (all of them optional) for Picture Type (such as bitmap, jpeg, etc.) a name for the photo, and space for a description (right side, back, top, etc.) – these are added after you upload the photo.

To add the picture itself, click on the “Add Picture” button at bottom left.



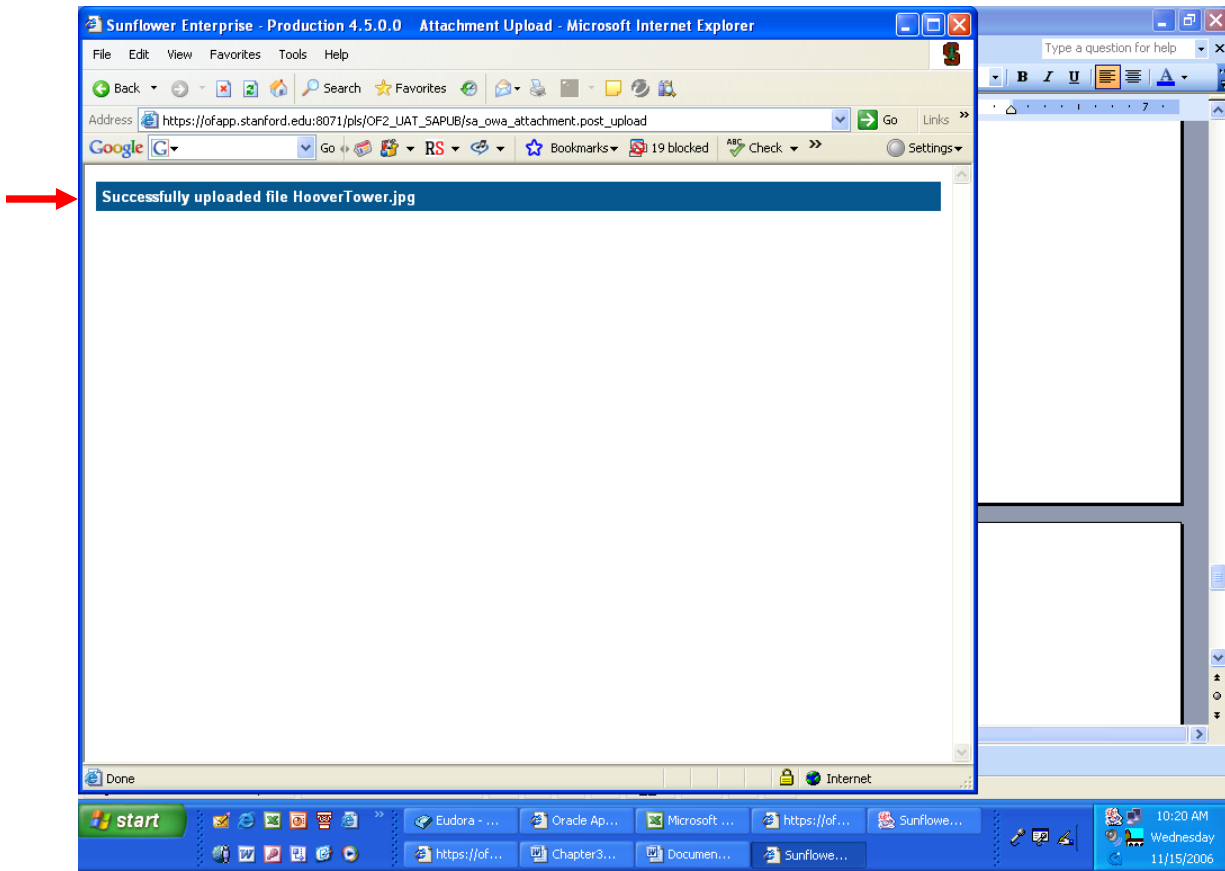
A new window opens, from which you will select the photo from your files. (This will access your C:drive. Attached removable drives, and any shared drives that you belong to. It will not search files outside of your system, such as the internet.

Click on the “Browse” button to search for and upload the photo you want to attach to the record.

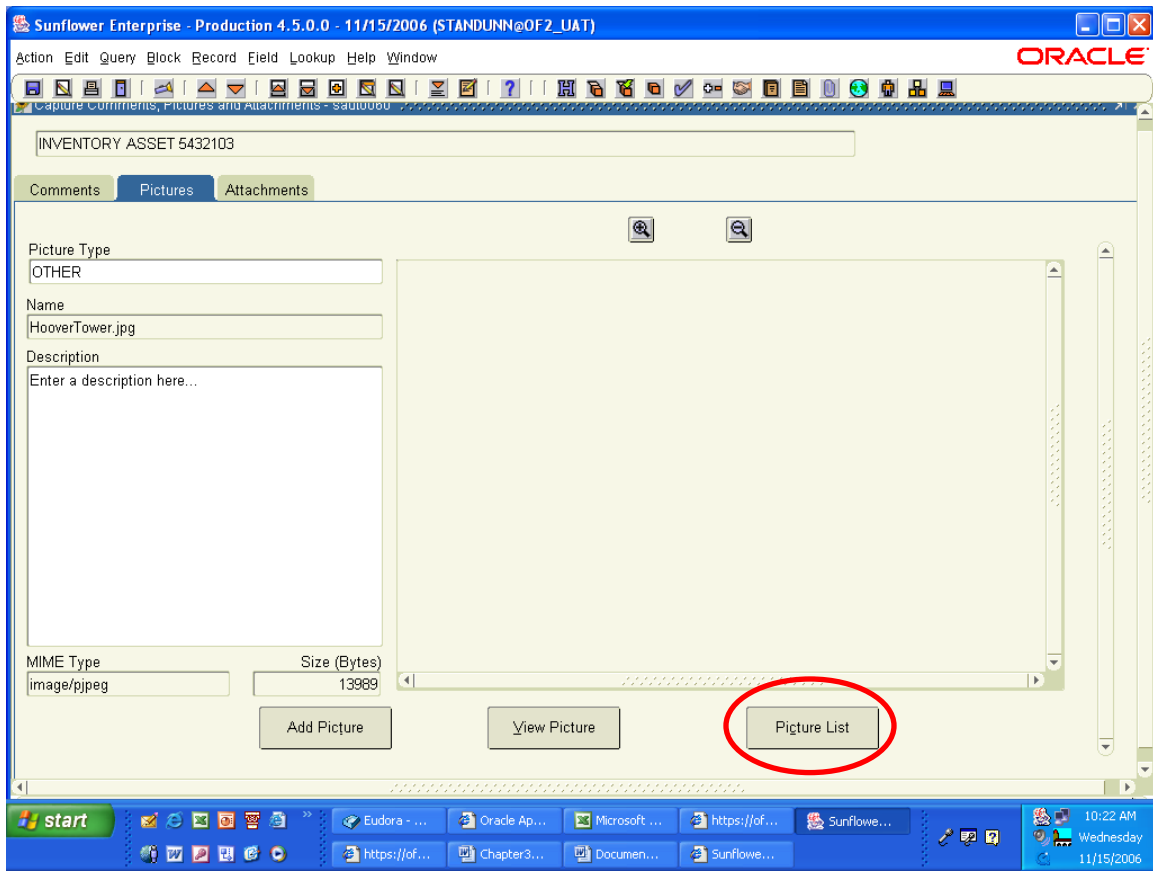


A search window opens, similar to one you would see when opening a file from Excel or Word. Navigate the same way, looking in your hierarchy of drives and folders until you locate the file you want. Double-click on the file name, or select it so the name populates in the “File name” field, then click on “Open”.



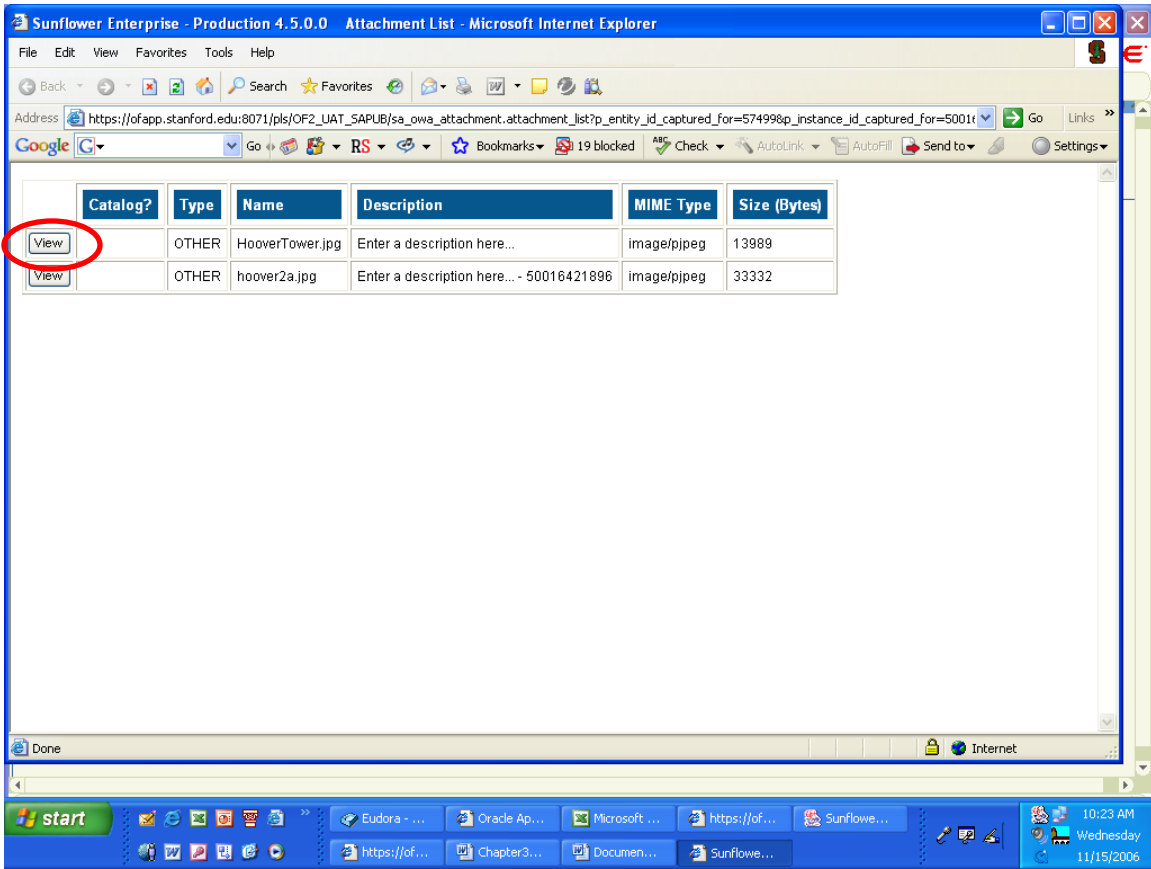


Unless there was a problem, you should get this confirmation message, indicating that the photo uploaded successfully.

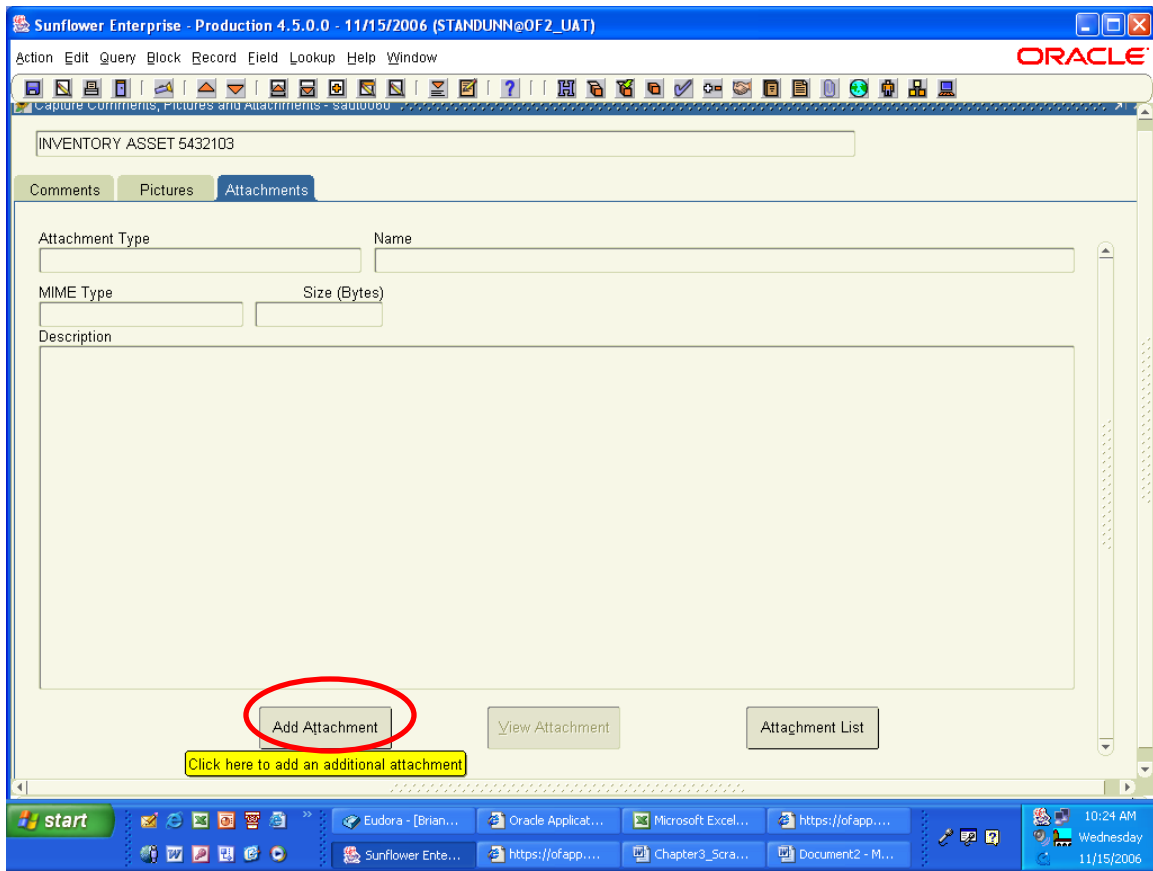


Now you can add a picture type, change the name (the file name populates here) and any description info.

You can upload several photos. Once loaded, to see all of them click on the "Picture List" button.

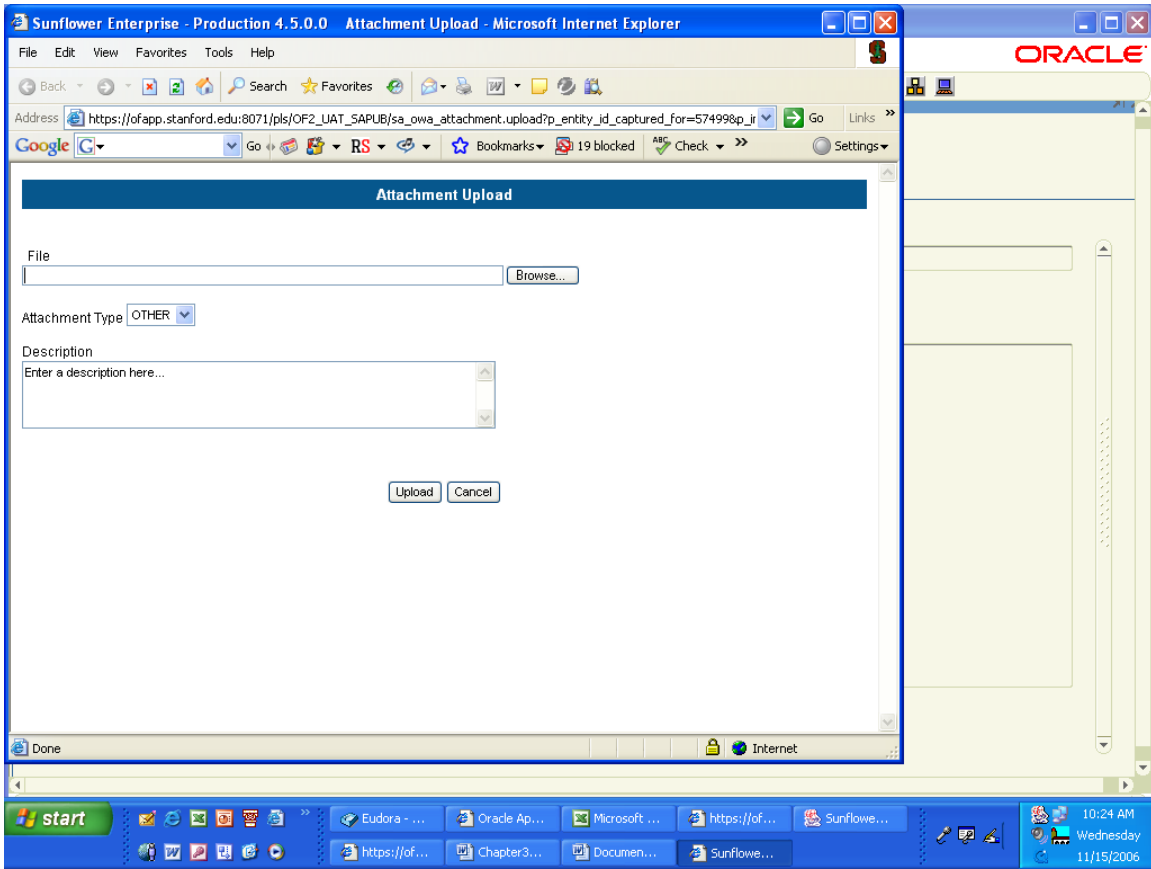


This is the list of photos attached to the record. To view any of them, simply click on the “View” button to the left of the photo you want to view.

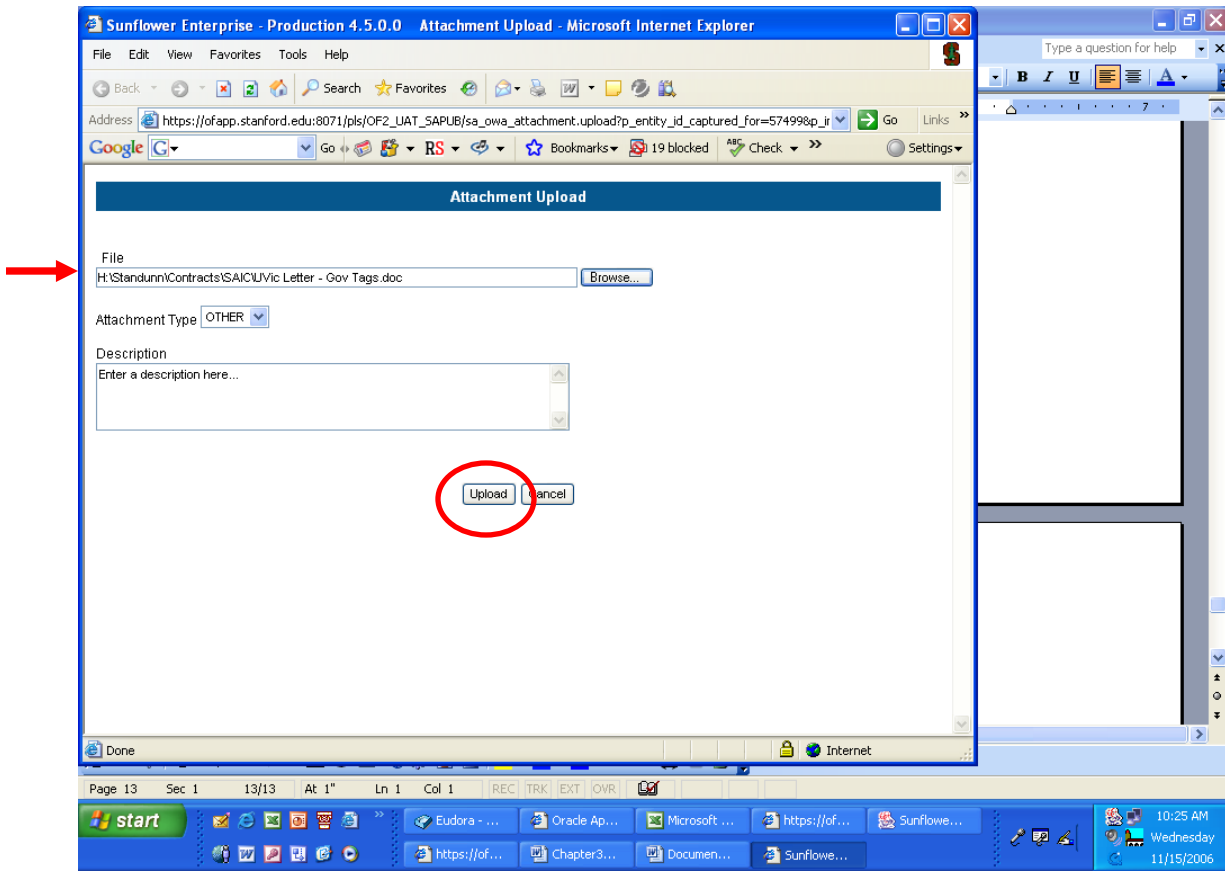


If you have a document to attach, that can also be done. Simply ensure the document you want is stored on your system electronically, as a word processing doc, a .pdf file, or a spreadsheet.

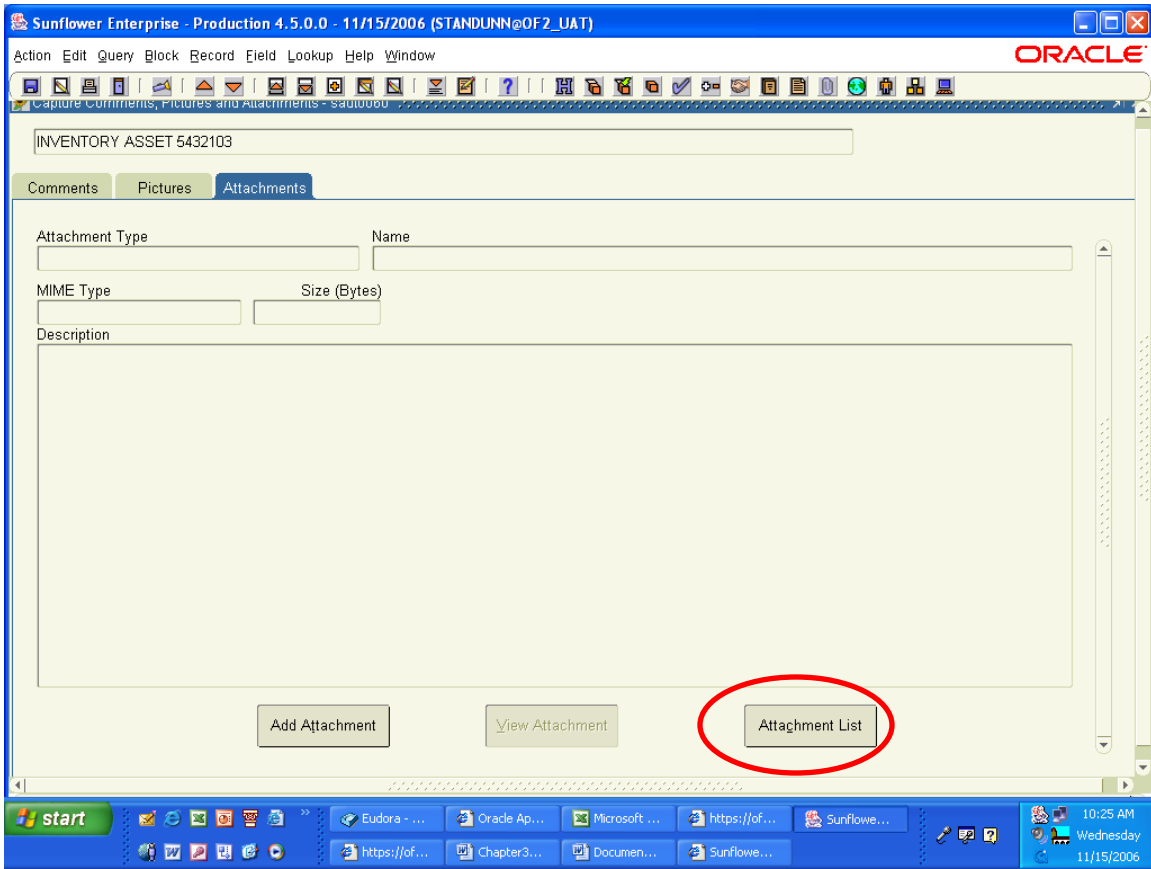
To search for the file to upload, click on the “Add Attachment” button.



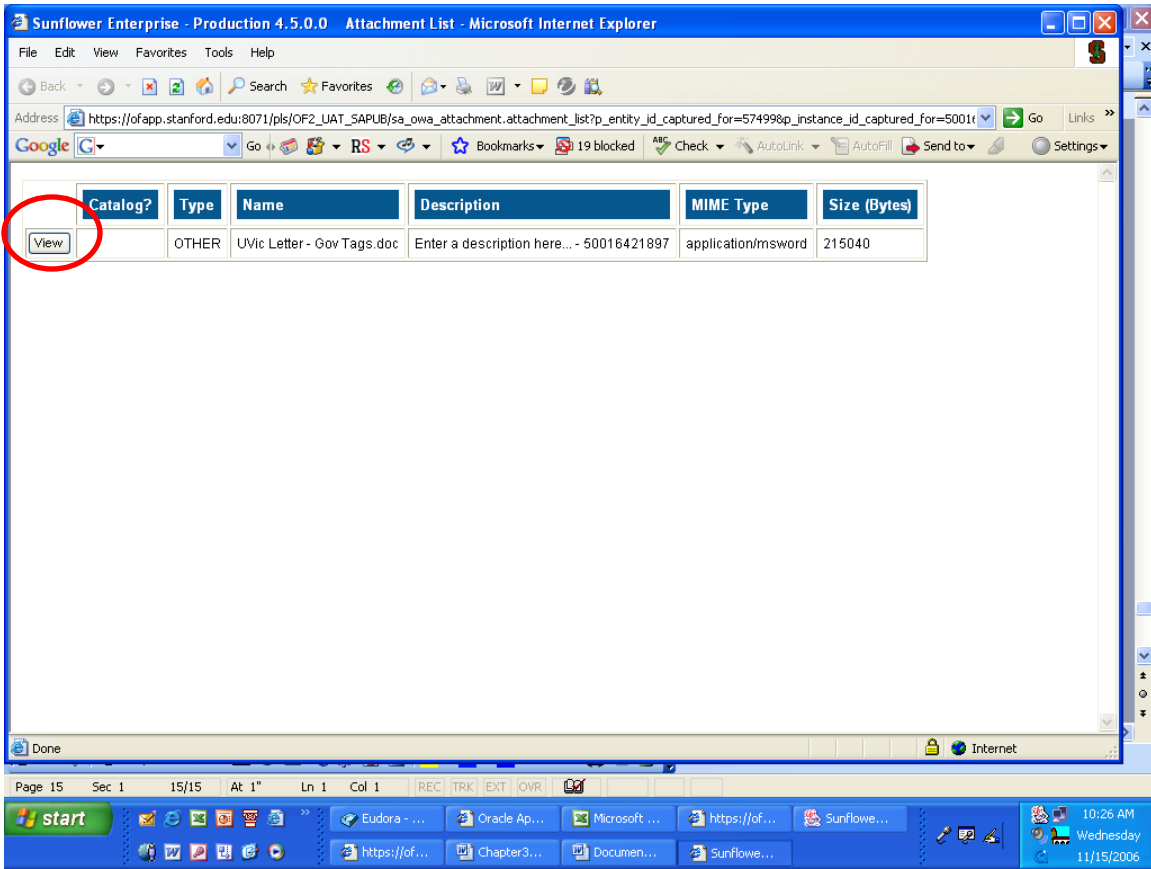
Just like with photos, you can search all accessible drives and folders to locate the file you want to attach.



Once you have located the file you want, and it's in the Browse field, click on the "Upload" button to attach the document to the record.



Also like the photo feature, you can access the list of attached documents by clicking on the “Attachment List” button.



And again, to see any document on the list, click on the “View” button to the left of the document information line.