


Attaching Documents and Photos in PeopleSoft Asset Management – All Roles

From the **Asset Information** page, you can attach and store documents along with a current photo related to the equipment record. Photos are displayed in equipment searches. Only one photo can be attached at a time. A new photo will replace the current photo.

Navigate to the Asset Information page via the WorkCenter and click on a pending transaction for custodial review or curation. If you do not have any pending transactions, navigate to the WorkCenter **Links** section and select the **Asset Information** link under **Manage Assets**. Search for an existing asset by entering the applicable search criteria to open an equipment record.

Attaching and Deleting Documents

- 1 From the Asset Information page, click the **Attachments** hyperlink. The number in parentheses indicates the number of documents currently attached to the record.
- 2 The Attachments window displays. Click **Add Attachment**.
- 3 The **File Attachment** window displays. Click **Browse**.
- 4 The File Upload window displays (not shown). Search for and select the applicable file and click **Open**. The name of the file will appear in the **File Attachment** window.
- 5 Click **Upload**.
- 6 Upon returning to the Attachment window, enter a sensible **Description** for the content being attached in the **Details** section.
- 7 Click **Add Attachment**. The attachment number is updated to reflect the number of attachments for the equipment record. **Attachments (1)**
- 8 (Not shown) To delete an attachment **repeat step 1** and **select** the minus sign () at the end of the row for the attachment you want to delete.
- 9 The **Delete Confirmation** window displays. Click **OK** to remove the document from the equipment record. Click **OK** again to return to the **Asset Information** page.

Asset Information | Asset Keywords | Acquisition Information | Asset Image

Business Unit: SFCMP | Asset ID: 000812002797 | Curated:
Tag Number: 812002797 | Asset Status: In Service | Custodial Review:
Nick Name: | Profile ID: E6712 | Acquisition Date: 02/01/1982 | Placement Date: 02/01/1982
Description: ULTRA CENTRIFUGE
Detailed Description: ULTRA CENTRIFUGE | Attachments (0) | Customize Page Layout

Asset Structure

Equipment Category: | Asset Type: Equipment
Component of: | Asset Subtype: |
Tag Number: | Order Cst As for:

Unit: SFCMP | Asset ID: 000772003078 | MICROSCOPE, MEDICAL | Tag Number: 772003078 | In Service

Details | Personalize | Find | View All | First | 1 of 1 | Last

| File Name | Description | User | Name | Date/Time Stamp |
|-----------|-------------|------|------|-----------------|
| View | | | | |

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Add Attachment

File Attachment

Browse... No file selected.

Upload Cancel

Details

| File Name | Description |
|-------------------------------|-----------------------------|
| Master_Service_Agreement.docx | Service Contract with - xyz |

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Add Attachment

Delete Confirmation

Delete current/selected rows from this page?

OK Cancel

Attaching Documents and Photos in PeopleSoft Asset Management – All Roles

Setting and Replacing an Equipment Photo

For a simple way to prepare a photo for attachment to the equipment record:

- Take a photo of the equipment using a cell phone or other device.
- Email the photo to your work email.
- Save the photo to an easy to locate folder to attach to the PeopleSoft equipment record.

To add the image to the equipment record:

- 1 From the Asset Information page, click the **Asset Image** tab. The Image attachment window displays.
- 2 Click the paperclip icon.
- 3 The **File Attachment** window displays. Click **Browse**.
- 4 The File Upload window displays (not shown). Search for and select the applicable photo and click **Open**. The name of the file will appear in the **File Attachment** window.
- 5 Click **Upload**.
- 6 The Image of the equipment record is displayed. Click **Save** (not shown). The image for the equipment record is saved and will be visible in equipment searches.

To replace the current image, repeat steps 1 - 6 .

To delete an image from the equipment record click the Trash Can Icon (a) in the image window and click **Save**. The image is removed immediately from the equipment record.

