Comments & Attachments FAQs

The following FAQs cover common questions asked by users when working with comments & attachments in ePro requisitions. If you have a question that is not answered here, please submit an e-mail with your question to fntrain@ucf.edu, Subject: NEW Comments & Attachments FAQ.

1. When should I use a comment on a requisition?

2. What is the difference between a header comment and a line comment?

3. You talk about header and line comments but I only see one comment field. Where are the two types located?

4. What do the check boxes under the Comments fields mean?

5. How do I know which comment to use for my attachment?

6. Are there any file restrictions for attachments?

7. Who can view my attachments?

8. How can I make sure the vendor sees attachments from my requisition?

1. When should I use a comment on a requisition?

You can add comments any time you need or want to provide information for approvers, the Purchasing Department, Accounts Payable, or your vendor. See # 4 for more information on how comments get routed to different people.

You MUST add a predefined standard comment to your requisition when it pertains to one of the following situations:

Relating to requisitions for/with…	Description	Comment Type	Comment ID	Header or Line Comment?
ALL REQUISITIONS (except those with a Travel comment)	ALL REQUISITIONS require this header comment to identify the requester's name, phone number, location, and department.	DEP	D001	Header
Assets	All asset line items require a comment with the asset location, tag type, & estimated life.	AST	A001	Line
Attachments	All requisitions with documents attached require this comment to be paired with the attachment. The comment can be edited.	DEP	D005	Header or Line, whichever is applicable
Increase Blanket Purchase Order	This comment is required if a change is needed after a requisition has been sourced to a purchase order.	DEP	D004	Header
Travel	A free-text comment is required for all travel-related requisitions.	N/A	N/A	Header

<return to list>

2. What is the difference between a header comment and a line comment?

In theory, a header comment should pertain to the entire requisition while a line comment should be specific information about a requisition line.

However, you may need to create a line comment to add an attachment you would normally add to a header comment if you want that attachment to be viewed by your approver (see # 7 for more information).

<return to list>

3. You talk about header and line comments but I only see one comment field. Where are the two types located?

The Comments section that is directly on the **Checkout-Review and Submit** page of the requisition, beneath the **Requisition Lines** section, is for the header comment. Line comments are accessed separately by clicking the conversation bubble at the far right of each line in the **Requisition Lines** section. See the following graphic for clarification.

<return to list>

4. What do the check boxes under the Comments fields mean?

The check boxes allow you to select where/to whom you want a comment routed. Each comment has its own set of check boxes. In other words, if you have more than one comment that you want to be sent to the vendor, you will need to select the **Send to Vendor** check box for each comment. The check boxes and their descriptions are:

Check Box	Description	Special Notes:
Send to Vendor	Select this check box to have a comment printed on the purchase order.	
Show at Receipt	Select this check box if you want this comment to be visible to the person receiving on the requisition.	Since you always have access to view the comment as the requester, this check box does not provide much additional value if you are also the receiver (which is often the case). However, selecting this check box in that scenario also does no harm.
Shown at Voucher	Select this check box if you want the comment viewable to Accounts Payable and printed on the voucher.	
Approval Justification	Select this check box if you want the comment viewable to your requisition approver.	This check box is only available on the first header comment; it is not available on any other header comments or any line comments. However, your approver will be able to view line comments. Any attachments that you want your approver to be able to view should be attached to a line comment. See # 7 for more information.

<return to list>

5. How do I know which comment to use for my attachment?

Attachments should correspond with how the comment is used: an attachment that pertains to the entire requisition should be attached to the header comment while an attachment that is related to a specific requisition line should be attached to the line comment for that line. An exception is described in # 7.

<return to list>

6. Are there any file restrictions for attachments?

Yes. Attachments must be one of the following file types: .pdf, .doc, .xls, .docx, .xlsx, or .txt. Also, the file name cannot exceed 60 characters and should not include symbols or special characters such as an ampersand (&).

<return to list>

7. Who can view my attachments?

The Purchasing department can view attachments to header comments and line comments.

Your approver can view only attachments to line comments. This means that even if an attachment relates to your entire requisition and would normally be attached to the header comment, you must attach it to a line comment if you want the approver to see it.

<return to list>

8. How can I make sure the vendor sees attachments from my requisition?

In the **Attachments** section of the **Comments** box, select the check box in the **Send to Vendor** column of the appropriate attachment line(s). For each applicable comment associated with an attachment, you should also include a request to forward the attachment to the vendor in the comment text. By taking both these steps you ensure that the attachment is sent, whether it is transmitted manually or automatically via e-mail.

<return to list>