



**Adding Text to
Correspondence Log
Using the Attachment Function**

Adding Text to the Correspondence Log using the Attachment Function

*PD²'s **Correspondence Log** function is an excellent place to record or store correspondence about discussions/negotiations. Please note however, that the log is limited to 256 characters (2 ½ lines) of narrative, so be brief. The log should be used to record the subject of the correspondence, sender, date received. etc. Actual correspondence should be attached via the "Attachment Module" and stored in a properly labeled electronic folder (Section 2.6.1: AF CONOPS)*

For additional explanation on how to attach correspondence to the **Correspondence Log** using the **Attachment** module, see below.

1. What is a PD² **Attachment**? The PD² **Attachment** is the icon which you create, by selecting:

- **Utilities>Document Import**; or,
- **Procurement>Attachment>New**.

The only difference between these two menu options, is that when you select **Procurement>Attachment>New**, you must highlight a PD² document first. The first menu option (**Utilities>Document Import**) allows you to create a standalone **Attachment**. When you select **Utilities>Document Import**, the **Template** and **Template Type** fields are inactive.

So, if you are not going to attach the **Attachment** to a document in PD², select **Utilities>Document Import**. When the **Import Attachment** window opens, enter all relevant information and click [**OK**].

Import Attachment

Attachment Number:

Attachment Title:

When you select Utilities>Document Import, the Template Type and Template fields are inactive.

Source Document

CLINS:

Contact

Name:

Organization:

Phone: **Add**

Template Type:

Template:

Status: Open Completed Canceled

Action Pending:

Expiration Date:

Dollar Value Limit:

Description:

Transmission Method:

Classification:

Edit **OK** **Cancel**

If you are going to attach the **Attachment** to a document in PD², click on the document to highlight, and from the menu bar, select **Procurement>Attachment>New**. When the **Create Attachment** window opens, select a template and template type in the **Template** and **Template Type** fields.

Create Attachment

Attachment Number:

Attachment Title:

When Procurement> Attachment>New is selected, you must enter a template type and template.

Source Document

Description: Simplified Purchase

Number: F40600-01-P-0004

CLINS:

Contact

Name:

Organization:

Phone: **Add**

Template Type:

Template:

Status: Open Completed Canceled

Action Pending:

Expiration Date:

Dollar Value Limit:

Description:

Transmission Method:

Classification:

Edit **OK** **Cancel**

Once you enter all relevant information in the **Create Attachment** or **Import Attachment** window, click [OK]. MICROSOFT Word will open on your desktop.

- Type in the text of the correspondence you attempted to enter in the **Comments** field of the **Correspondence Log Detail Screen**. If the correspondence or text of the item, which you are attempting to insert in the **Comments** field, is saved on a network directory, select **Insert>File** from the menu bar in MICROSOFT Word, and search for the file. Once you locate the file, highlight it and click [OK] and the file will be saved as your attachment. Once you save and close the file, created in MICROSOFT Word, the **Attachment** icon will appear on your desktop.



- To access the text of the **Attachment**, double-click on the desktop icon. The text of the attachment will open in MICROSOFT Word.

2. Inserting the Attachment in the Correspondence Log.

- In the **Correspondence Log Detail Screen** window, click [Add].

Correspondence Log Detail Screen

Subject: Communication Frequencies

Correspondence Source: Incoming Outgoing

Contact

CODE

Submitted Items:

Add... **Delete**

Date: 18-Jul-2001 **Type:** Phone **Important**

Comments:
Spoke with TSgt Hollingsworth of requesting activity regarding the frequencies for requested equipment. He indicated that they have been working the Communications Sq to obtain same and thought everything was set however wasn't sure. He will verify stat

Response Due:

OK **Cancel**

- In the **Select Form** window, search for your user ID, in the **Document Category** field.

When you select your user ID, an icon representing your desktop will display in the **Select Form** window.

Select Form

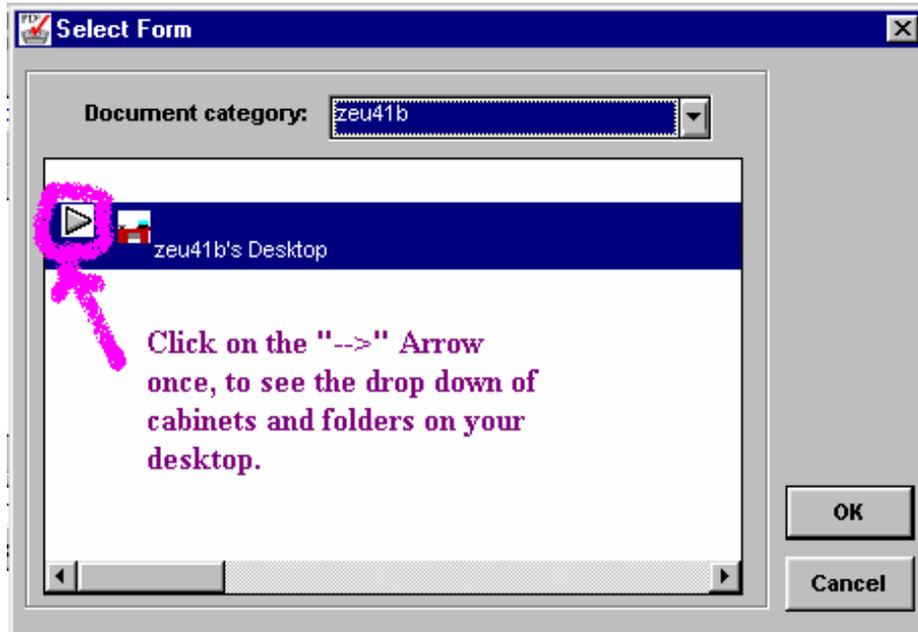
Document category:

Please select a user

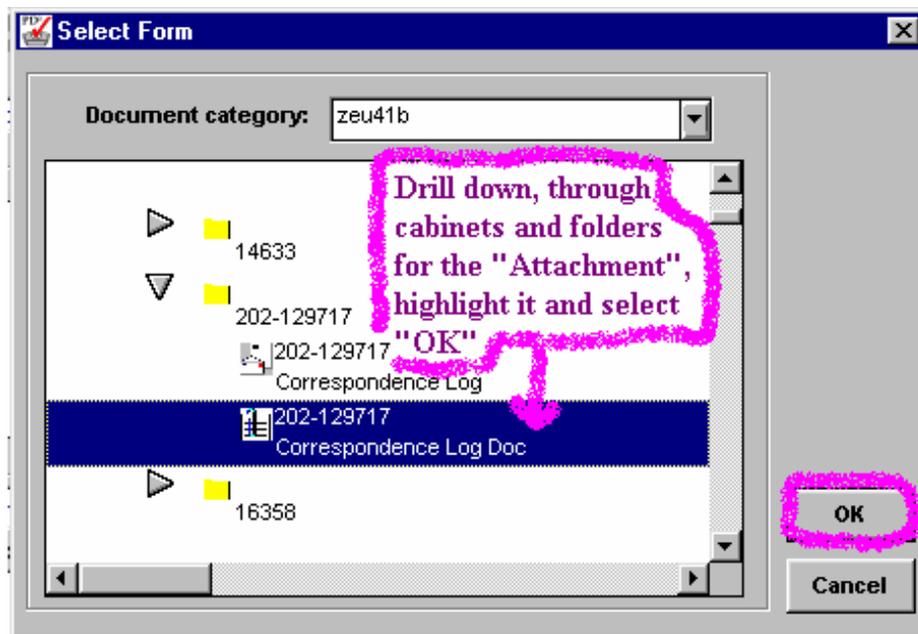
willyb	Willy T Cat's Desktop
zeu41b	I me's Desktop
zeu41b2	Jack McGovern's Desktop
zeua	3 3's Desktop
zeub	4 4's Desktop

Search for your User ID in the "Document Category" drop-down block.

OK **Cancel**



- The [>] button, in the **Select Form** window, displays next to folders and cabinets, which contain folders and documents. Click on the [>] arrow button and search through the cabinets and folders, listed below your desktop, for the **Attachment** you created in Step 1. Highlight it and click the [OK] button.



- When you click [OK], the **Attachment** that you selected will display in the *Submitted Items* panel of the **Correspondence Log Detail Screen** window. To add more **Attachments** or items to the *Submitted Items* panel, click the [Add] button and repeat steps outlined in step 2 (above). If you do not have the **Attachment** created, repeat

instructions in step 1 (above). Note: You cannot access the text of the **Attachment** from the *Submitted Items* panel. To open the text of the **Attachment**, you must exit the **Correspondence Log**, and double-click on the **Attachment** icon on your desktop.

Correspondence Log Detail Screen

Subject: Communication Frequencies

Correspondence Source: Incoming Outgoing

Contact: CODE [] **Add**

Submitted Items:

- 202-129717 Correspondence Log Doc Attachment

Add... **Delete**

Date: 18-Jul-2001 **Type:** Phone **Important**

Comments:
Spoke with TSgt Hollingsworth of requesting activity regarding the frequencies for requested equipment. He indicated that they have been working the Communications Sq to obtain same and thought everything was set however wasn't sure. He will verify stat

Response Due: [] **OK** **Cancel**