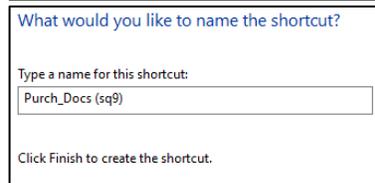
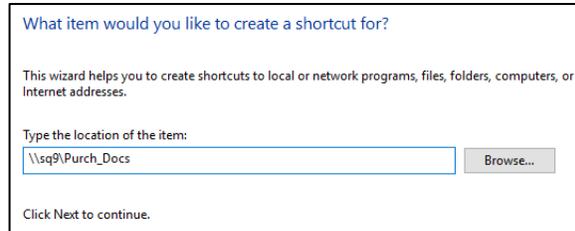
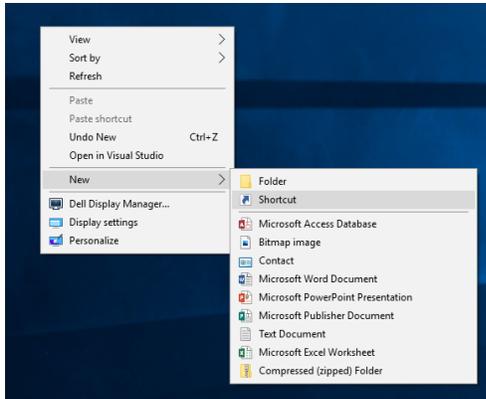


**Document Submission Instructions for:**

**Square9 – Purchasing**

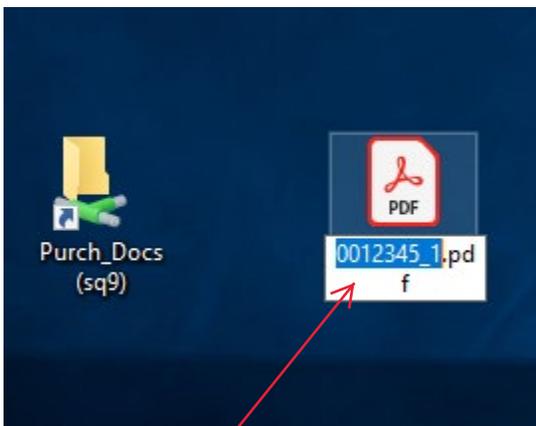
**One time task**

Create a new shortcut by right clicking on an open area of your desktop. For location or path, enter \\sq9\Purch\_Docs and click Next. Type the name you want for the icon (or leave the default) and click Finish.



**To Submit a Document to Square9**

Rename the selected document to the Purchase Requisition number including the leading zeroes and add an underscore symbol followed with a number based on the following table. The number signifies the document type.



Example: Requisition #12345  
rename to 0012345\_1

1	Quotes/Invoices
2	Contracts/Agreements
3	COI Insurance
4	PO & BPO
5	Communications
6	Board Document
7	Fully Executed Agreement i.e. ICA
8	PWC-100
9	Bid Documents
10	Other Documents
11	Receiving
12	Approvals
13	Change Order Back Up

Drag the file to the folder. Within the folder, the file will disappear after a few moments. This means your file was successfully uploaded to Square 9.

## Direct Method from email

Right click on an email attachment and select Save As. Select the Purch\_Docs folder/shortcut as the destination and rename the file as indicated in the previous step. This method will not leave copies of the file in your computer.

## To Submit a Document using a copier

When scanning a document on a copier, select Purch\_Docs as the recipient. If you don't see such recipient, please contact the Help Desk to create a request for ITSS/CTSS to configure add the recipient to the copier.

Click on the "File Name/Subject Name/Other" tab.

Click on the File Name area and use the "C" button to clear it. Then, type the File Name as indicated previously (you may need to use the Shift key to find the underscore symbol) and click "OK".

Click "OK" and then the "Start" button.

The document will appear in Square9 in a few minutes with all the PR/PO information in place.

