**ARC ID: 6577 – Purchase Order Document Control Library and Print Screen**

Robert Cole, January 2022

For: BKIN Technologies LTD

Contact(s): Courtney Hammermeister [purchasing@kinarm.com](mailto:purchasing@kinarm.com)

**Business Case:**

BKIN needed a solution to be able to automatically group and pull up documents tied to parts on the Purchase Order in a screen where they could select the documents to be sent with the Purchase Order. This ARC project gives them a maintenance screen to set up PO document groups and select a root path for the document package as well as a screen that provides them a document library if there are any applicable parts when they go to print the Purchase Order.

**Project Components:**

This project consists of two custom screens and one custom menu item.

The custom screens / menu items are as follows:

* Purchase Order Document Group Maintenance
  + This is accessed through Business Intelligence>Administration>PO Document Group Maintenance and allows the user to set up new PO Document Groups and handles creating all the Document Group and Document Path information in the database.
* Purchase Order Document Library and Print Screen
  + This screen is accessed through the print button in the Purchase Order Header. When a Purchase Order is printed and there are applicable part documents the screen will populate, otherwise it will just prompt the standard PO print dialogue.

**Project Step-by-step:**

The maintenance screen is used to set up the document groups that will show up in the document library. The user can set up different groups via a VT, but for BKIN we have set two recognized groups of “INTERNAL” and “EXTERNAL”.

Graphical user interface, text, application, email

Description automatically generated

When the user enters these group names, selects a document path, and clicks save it sets up the back-end group LINK ID and document path.

The Document Library will populate when the user clicks on “Print” in the Purchase Order and there are applicable parts on the Purchase Order that have a Purchase Order document linked.

Graphical user interface, application

Description automatically generated

If the Document Library populates the user can then select which documents they want to print with the Purchase Order and then click on the “Print” button to begin the process of combining them.

Graphical user interface, text, application, email

Description automatically generated

The program will then begin the process of printing the Purchase Order and combining any selected documents into a single package. Once everything has been combined it will then open the file explorer to the combined file where the user can then file it away on their system or attach it to the Purchase Order Email they have drafted. The file will be labeled with the Purchase Order Number\_DOCS\_Timestamp and placed in a folder labeled with the Purchase Order Number in the root directory set up in the maintenance screen.

A screenshot of a computer

Description automatically generated with medium confidence

If the Purchase Order does not have any applicable parts with Purchase Order document links or the user chooses to dismiss the Document Library the standard Purchase Order Print dialogue will populate and the Purchase Order can be printed as it normally would.

Graphical user interface

Description automatically generated