


SAP Procedures


Attaching Documents or Notes to Journal Transfers

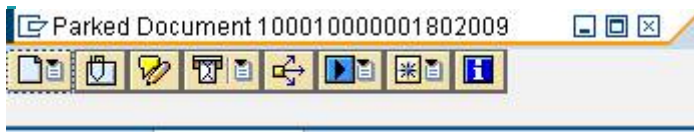
The Journal Transfers User Guide (refer to Finance > Accounting Manual > Policy Documents on DNet) requires that supporting documentation be attached to all transactions.

[Spreadsheets](#), [word documents](#), [e-mails](#) or [scanned documents](#) can all be attached in SAP [in support of](#) journal transfers (e.g. created using [FV50](#) or [ZFIUPLOAD](#)). Notes may also be added.

This is achieved by using the [‘Services for Object’ icon](#)  in SAP. In this way [users may create an extensive record of data and information relating to their documents](#) and meet the requirements of the Journal Transfers User Guide.

Use transaction [FB03](#) (or via [FBV0](#) if the Document is still parked and the user has this transaction) to identify the Document to which the attachment should be made, or to which the note should be added.

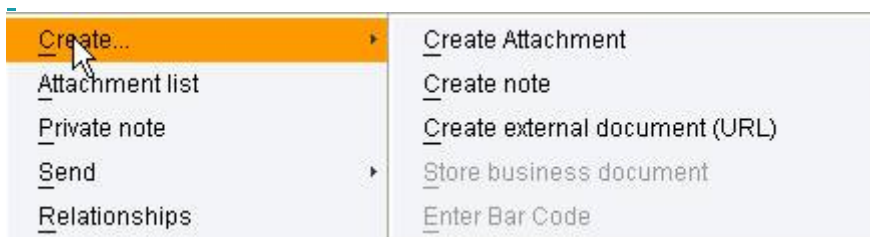
Left click the Services for Object [Icon](#)  on the **left hand side** to identify a drop down list in this format:



Or left click the [Icon](#)  on the **right hand side** to identify a drop down list in this format:




Taking the [right hand side](#) [click option](#), hover over 'create' to reveal a further drop down list:

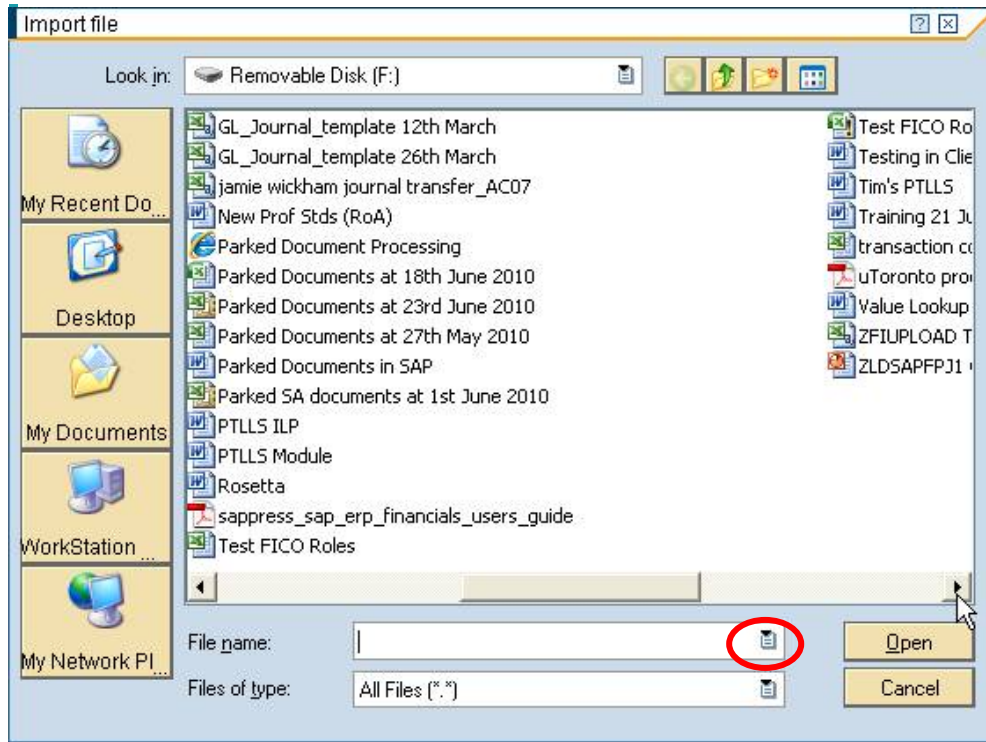


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Creating an Attachment (e.g. excel spreadsheet or word document)

From the above screen, use the drop down icon  to find the spreadsheet or word document that you wish to attach to your SAP Document or click into the Icons down the left hand side as appropriate:



In this example we shall choose the word document entitled “Rosetta” from our ‘F’ Drive to attach to our SAP Document by simply double left clicking the word document to save it as an attachment to our SAP Document.

Alternatively, we might select word documents only within the ‘Files of type’ field, single left click on the file of our choice.

Left click on  to save the word document to your SAP Document.

Check that the file has been successfully attached to your Document by again using the ‘Services for Object’ Icon and select ‘Attachment List’ from the drop down menu:



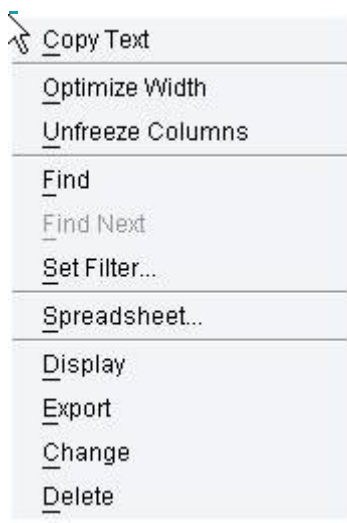
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The attachments are then identified within a drop down list:



Double left click anywhere on the line shown above to open the saved document, or single right click to identify the following drop down list from where the saved document can be changed or deleted if considered necessary.



Changing an existing document saved within your SAP Document

Single left click on 'Change' will open up the word document "Rosetta".

Make any changes to the word document.

Single left click the 'Save' Icon

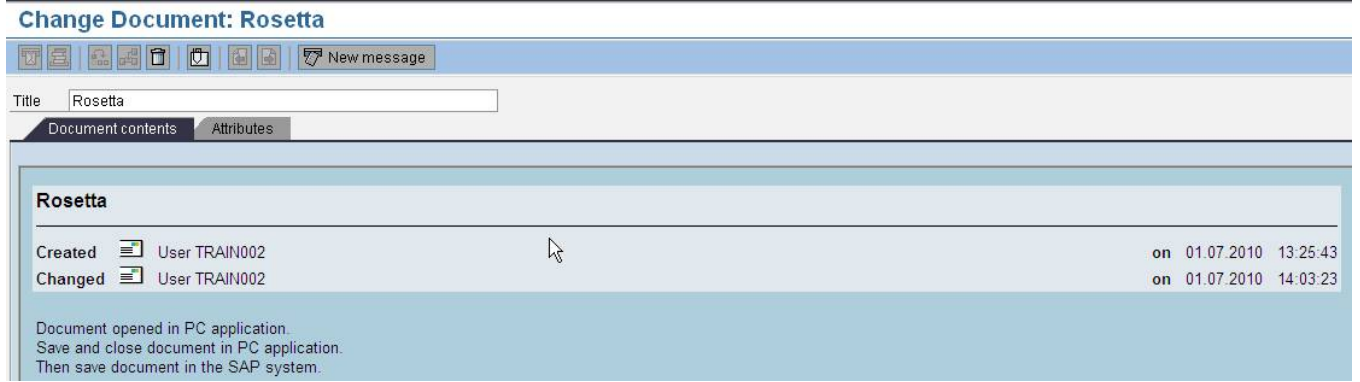


and then close .

SAP will keep a log of the originally created document along with any changes that have been made.

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Deleting an existing document saved within your SAP Document

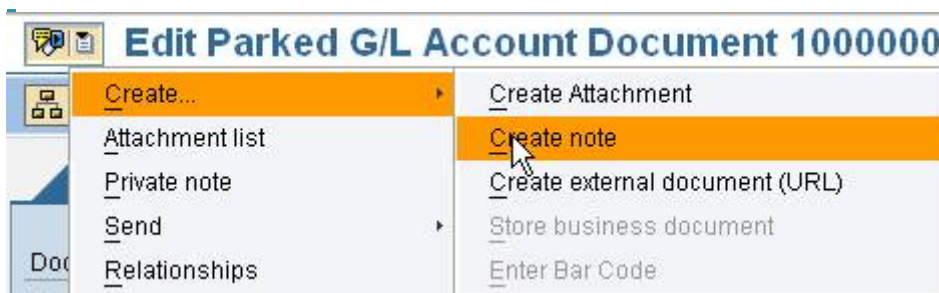
As per the instructions already given above a single right click will identify the following drop down list from where the saved document can be deleted if considered necessary.



Single left click on delete and select  to delete the attached document.

Creating a note

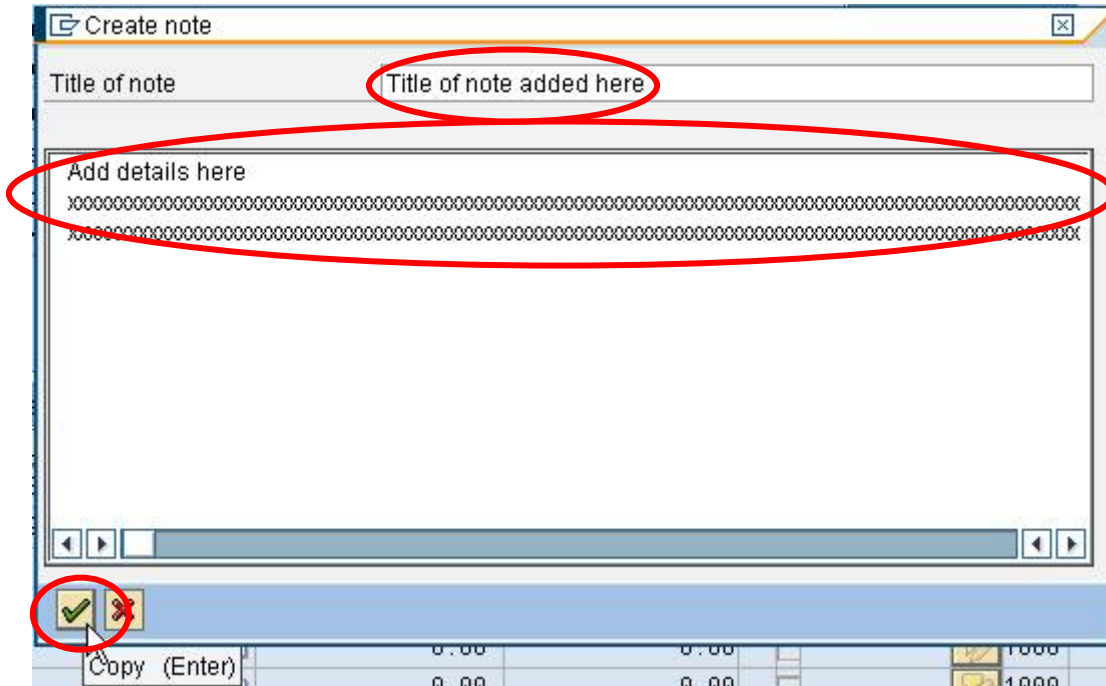
As per the instruction given above follow the path below to 'Create Note':



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This selection gives the following screen which may be populated with free text. When the text has been entered click the green (copy) tick to save your note:



The Attachment list now contains a record of the note that has been created in respect of this Document:



Whilst these notes do not specifically refer to scanned documents or e-mails, these types of documents may also be attached by following the instructions above.