

Adding Attachments to Purchasing Documents/Records

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Background

SAP has functionality to add attachments to various transaction documents and master records. The following are suggestions of where this functionality may be helpful in Purchasing:

- Attach vendor documents (specifications, order confirmation, bid results) to purchasing documents: purchase order, requisition, outline agreement, RFQ, etc.
- Attach the Material Safety Data Sheet (MSDS) to a material master with MM03.
- Attach cost sheets to the vendor record with MK03.

Note: In order to avoid deletion of critical business records, SAP security has been set so that once files are attached in SAP, only the support group at Vartan Way can delete them.

Helpful Hints

- To “change” an attachment, upload a new version. Both documents will be available in the attachment list, preserving the audit trail and history. You can include a date in the file name to indicate when it was updated, e.g. **Vendor Quote 01_15_2010.xlsx**.
- With the upgrade to SAP version ECC6.0, it is now possible to add attachments in create or change mode. (Previously, the upload could be done only in Display mode.)

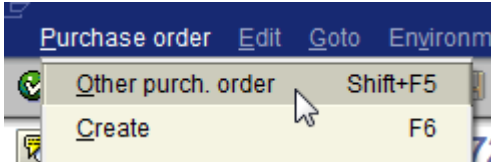
Note: If attachments are added during document creation, they will not appear in the Attachment List until the document is saved.

- An attachment to a purchasing document will not print when that document is printed.
- Most document formats can be added as an attachment. I.e. doc, xls, jpeg, txt, pdf, ppt, msg
- On Requisitions and Purchase Orders, the attachment toolbar will automatically pop-up to indicate that an attachment exists. If you want to turn this functionality off, set Parameter ID

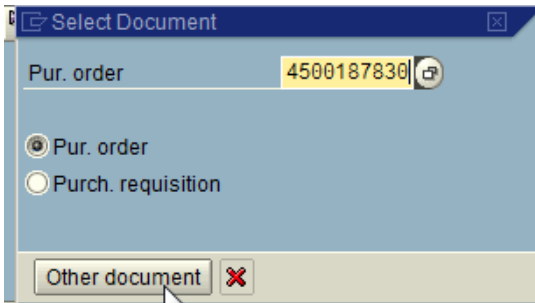
“ZAT” to “X.” See document on Parameter IDs for more information. For Material and Vendor Master records, there is no automatic notification that an attachment exists.

Creating an Attachment to a Purchase Order

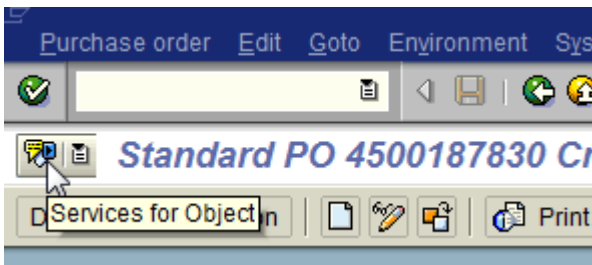
1. Execute transaction ME23N and click on the menu path Purchase order>Other purch. Order.



2. Enter the purchase order number to create the attachment against and click on 'Other document'.



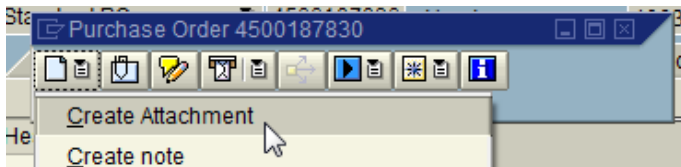
3. Click on the left hand side of the 'Services for Object' icon



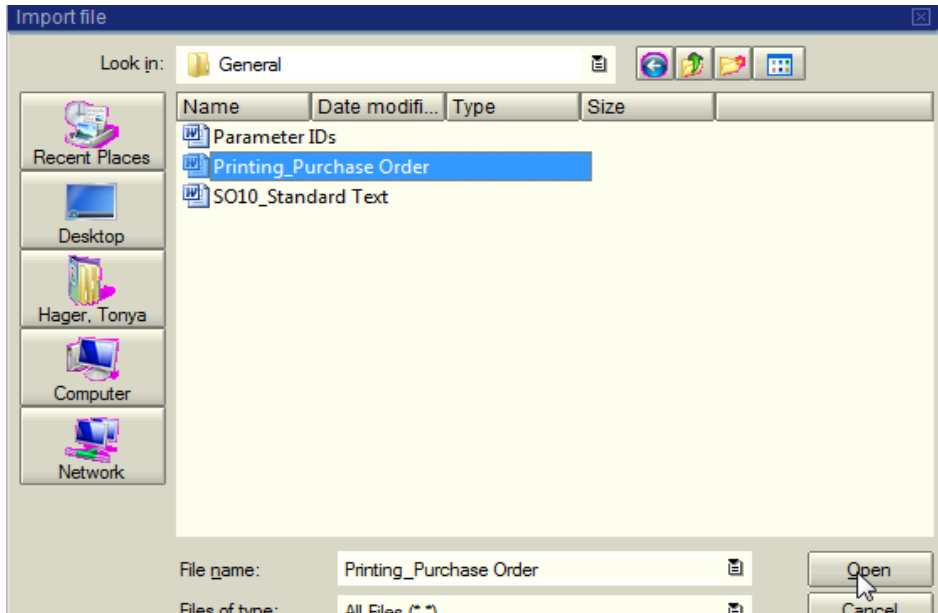
If you click on the right side of this icon you will receive a drop down instead of the toolbar shown in step 4. Click on the menu path 'Create>Create Attachment' and proceed to step 5 to locate the attachment for uploading.



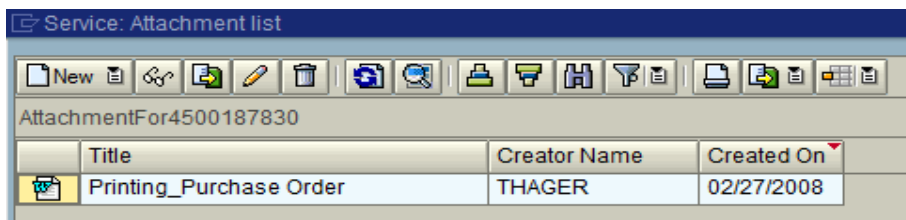
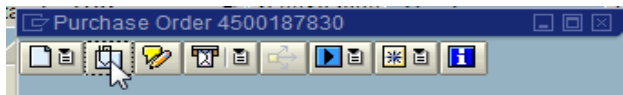
4. The following toolbar will appear, click on the 'Create' icon and then 'Create Attachment'.



5. Locate the file to be attached and click on 'Open' to attach document to this purchase order.

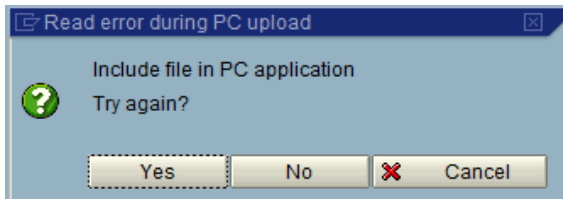


6. Click on the 'Attachment List' icon to see the document recently attached.



FAQ

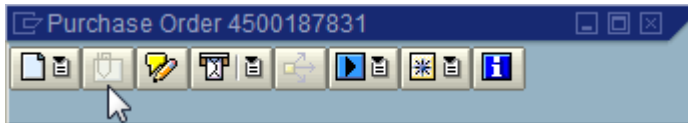
1. I am trying to upload an attachment and I am receiving the following message?



The message appears because the document to be uploaded is currently open in another window. Close the document and click on 'Yes' to try again.

2. How can I tell if my purchasing document/record has an attachment?

For Requisitions and Purchase Orders, the attachment toolbar will pop-up automatically if attachments exist. You do NOT need to close this toolbar to navigate within the document.



Note: If this icon is grayed then nothing is attached to this document/record.

3. What if I need to delete or change my attachment?

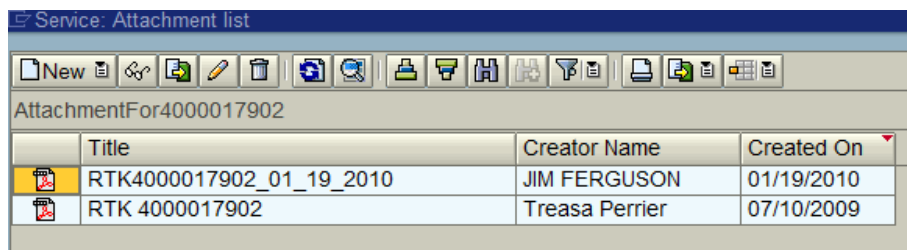
Deletion

In order to prevent accidental deletion of business records, only the support group at Vartan Way can delete attachments in SAP. In general, we should delete only items that were attached in error. E.g. The attachment was added to the wrong PO. If the attachment was relevant when it was added, but no longer applies, then add an explanatory note using the 'Create Note' functionality.

Updates

If an attachment needs to be updated with new information, attach the updated document and include the date of the new information in the attachment name. E.g.

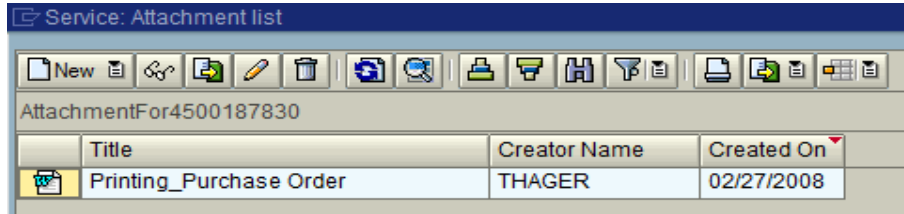
RTK4000017902_01_19_2010.pdf. Both files will appear in the attachment list and the creation date as well as the file name will indicate which one is the most recent document.



	Title	Creator Name	Created On
	RTK4000017902_01_19_2010	JIM FERGUSON	01/19/2010
	RTK 4000017902	Treasa Perrier	07/10/2009

4. How do I print my attachment?

In the attachment list box (shown below), double-click on the attachment to open that document with the appropriate program. Print as usual from within that software program.



Note: If you click on the 'print' icon in the window above, then SAP will print the "Attachment List" screen shown above. It will NOT print the attachment.