

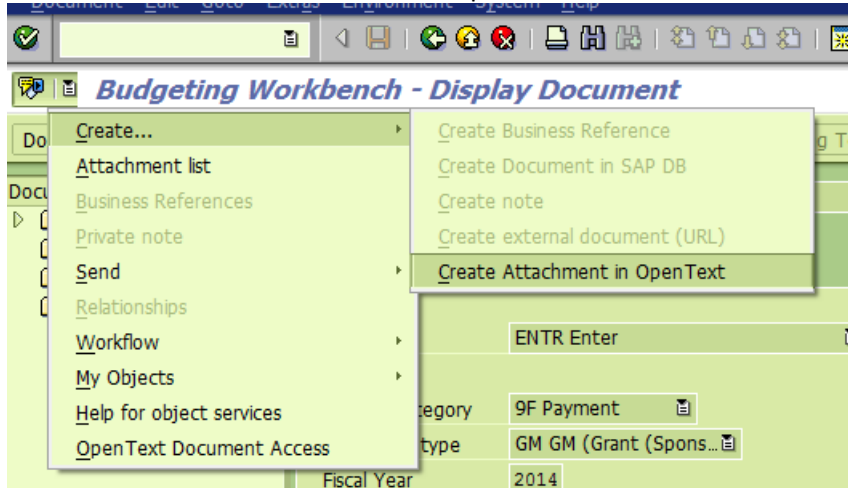
Budget Entry Documents - Supporting Attachments Work Instructions

1 Work with Attachments in the FMBB, FMEDD, or FMEDDW Transactions

1.1 Select or enter the t-code FMBB, complete the required fields, and post the budget entry. (Please note that the budget entry performed in FMBB has to be pre-posted first before attaching the supporting documents). Transactions FMEDD or FMEDDW follow the same procedures below:

1.2 Navigate to a budget entry document

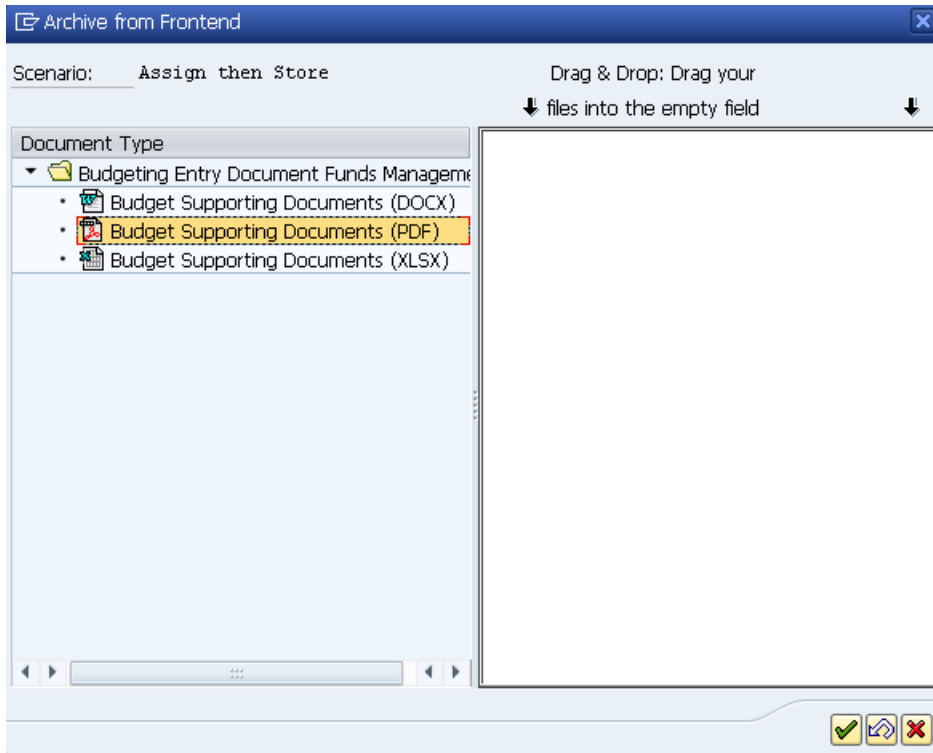
Select Create->Create Attachment in OpenText from the Services for Object options



1.3 Create Attachment

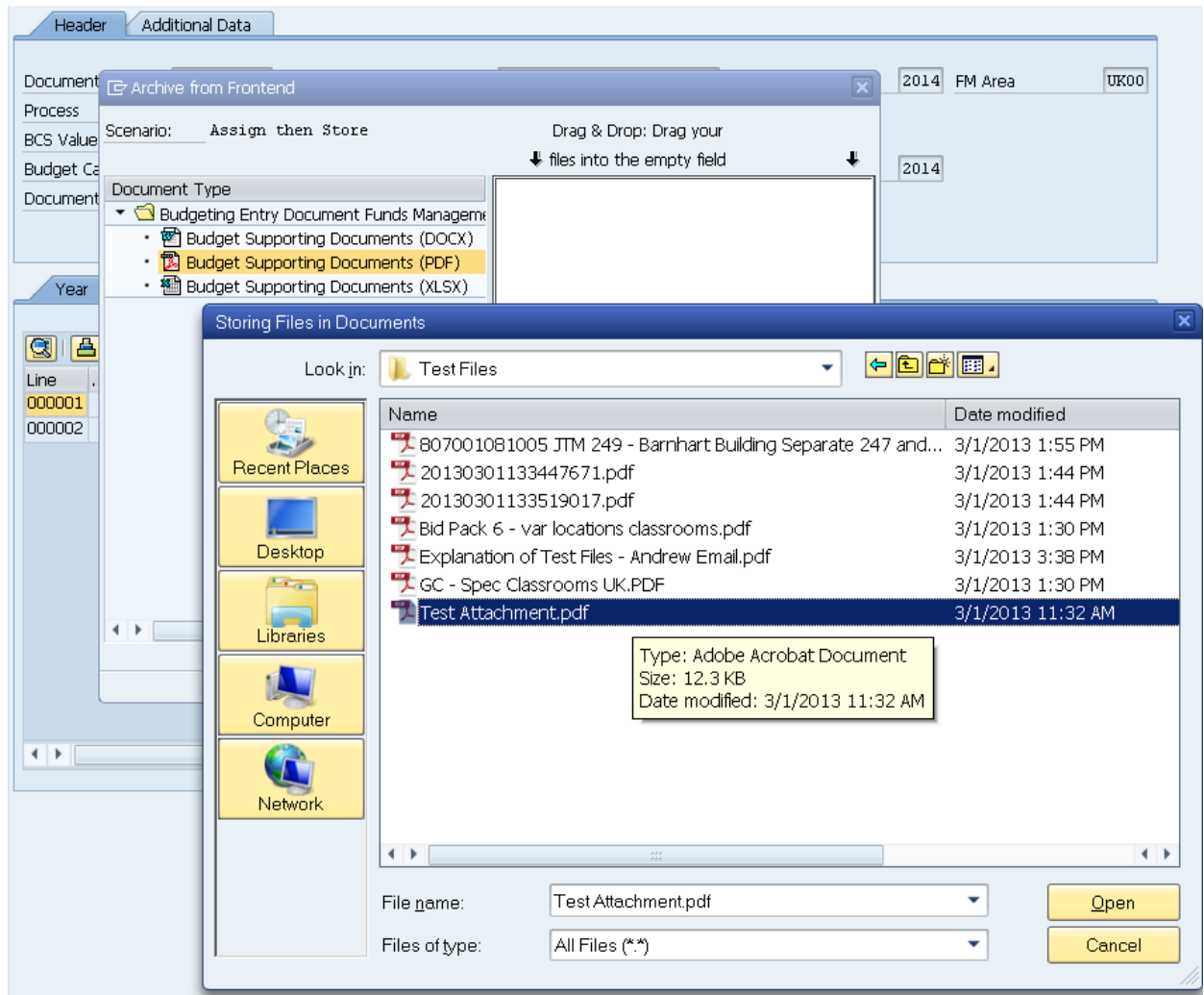
Select the document type to be attached by clicking the icon to the left of the document type description

Drag and drop one or more files of the correct type into the empty field to the right of the document type descriptions

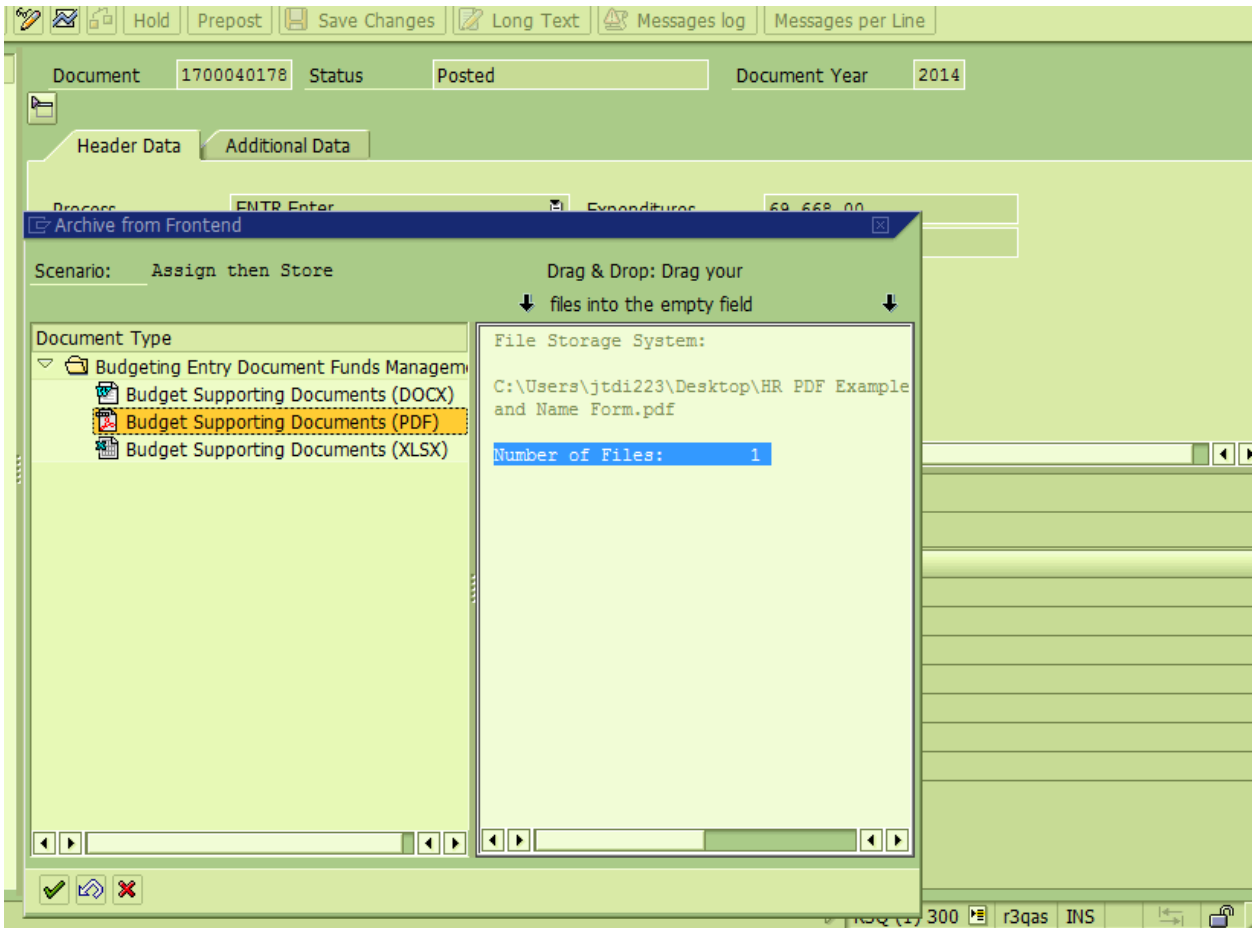
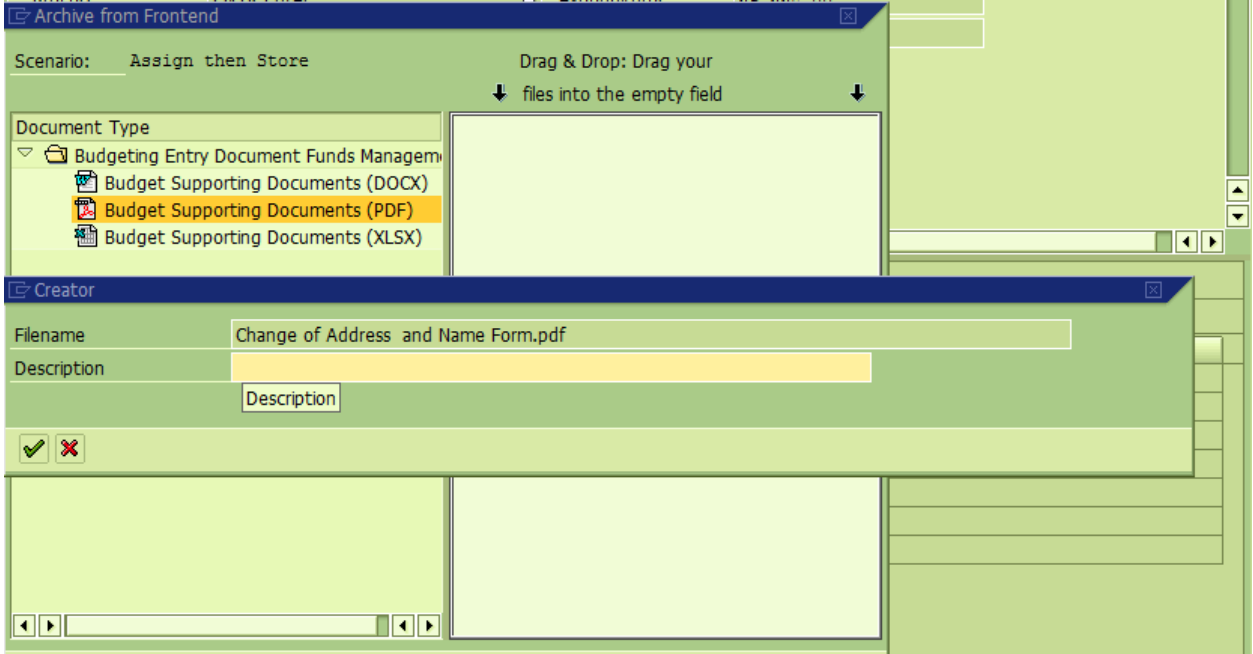


OR

Double-click the icon the left of the document type description to browse for the file



Optional: You may enter a description of the document you are attaching to the budget entry. Select the green checkmark when finished.



1.4 View Attachment List

Click the green check in the bottom right to close the Archive from Front end screen
 Click the Attachment List menu option from the Services for Object button

The screenshot shows the 'Entry Document' window. A dropdown menu is open over the 'Services for Object' button, with 'Attachment list' highlighted. The background displays document metadata and a table of budget lines.

Line	Grant	Fund	Funds Center	Commt It...	F.Ar	Fund...	Type	Amount TC	LC	DK	Text
000001	304810...	0226000010	1222000701	510000	0320	NR	GRNT	14,599.00	USD	1	
000002	304810...	0226000010	1222000701	415000	0320	NR	GRNT	14,599.00	USD	1	

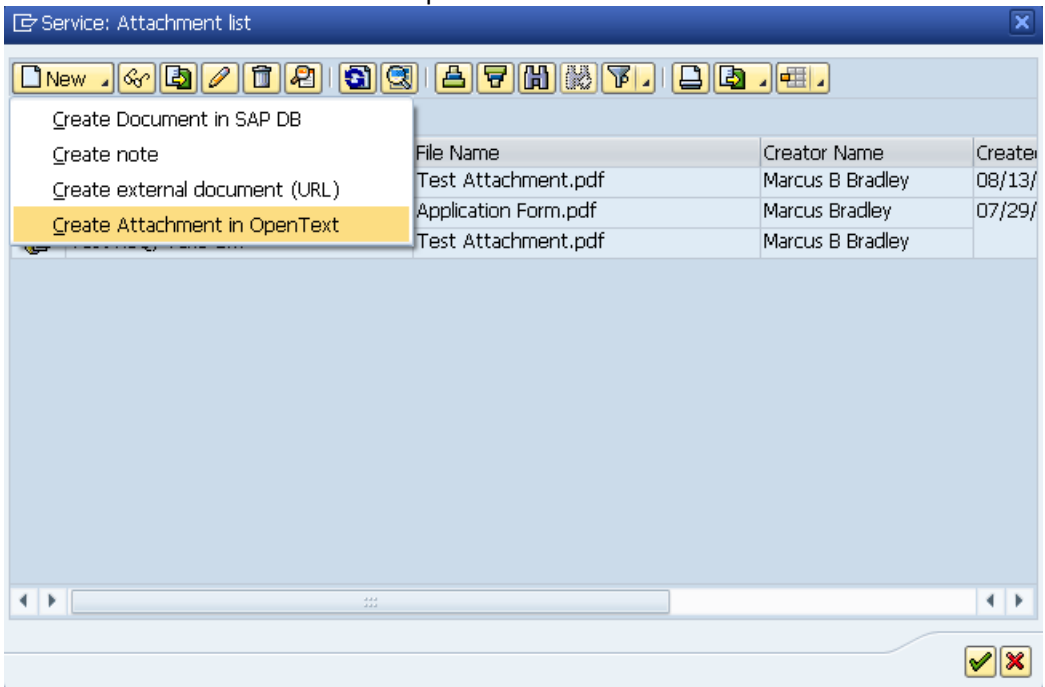
1.5 Open an Attachment

Double-click anywhere in the row of the attachment to open
 OR
 Select the attachment and click the Display button

The screenshot shows the 'Attachment list' window. It contains a table with three rows of attachments. The first row is selected. A green checkmark icon is visible in the bottom right corner of the window.

Icon	Title	File Name	Creator Name	Created
	Budget Supporting Documents (PDF)	Test Attachment.pdf	Marcus B Bradley	08/13/
	Budget Supporting Documents (PDF)	Application Form.pdf	Marcus Bradley	07/29/
	Test R3Q, Take 1...	Test Attachment.pdf	Marcus B Bradley	

1.6 Add Attachment from Attachment List
Click New->Create Attachment in OpenText



Select the document type to be attached by clicking the icon to the right of the document type description

(See step 1.3 for screenshots)

Drag and drop one or more files of the correct type into the empty field to the right of the document type descriptions

OR

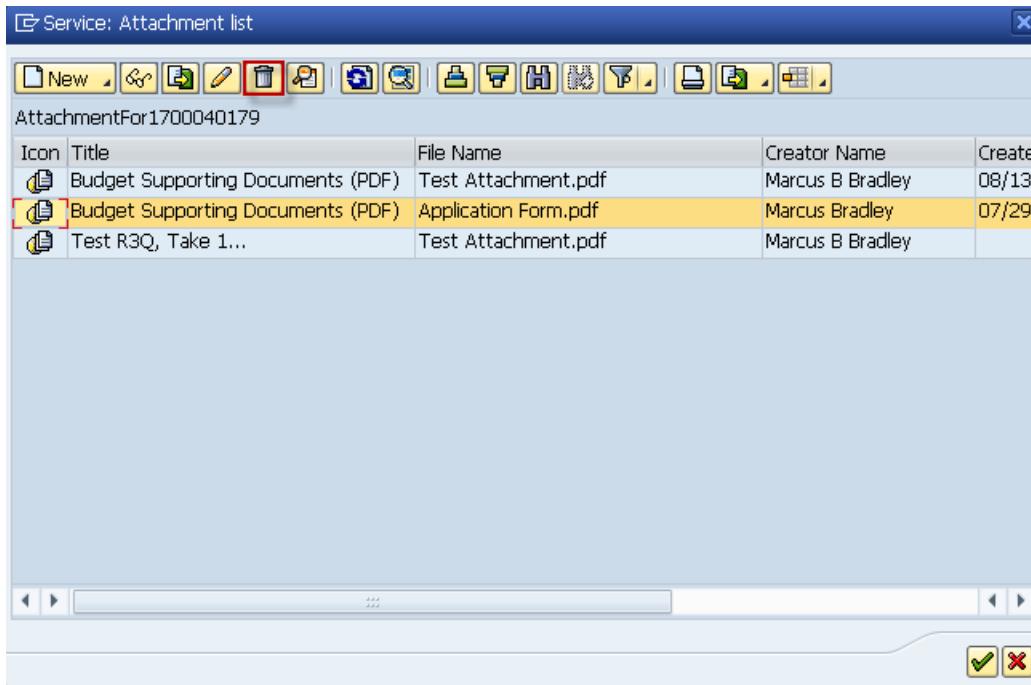
Double-click the icon the left of the document type description to browse for the file

1.7 Check Attachment List

Click the green check in the bottom right to close the Archive from Frontend screen

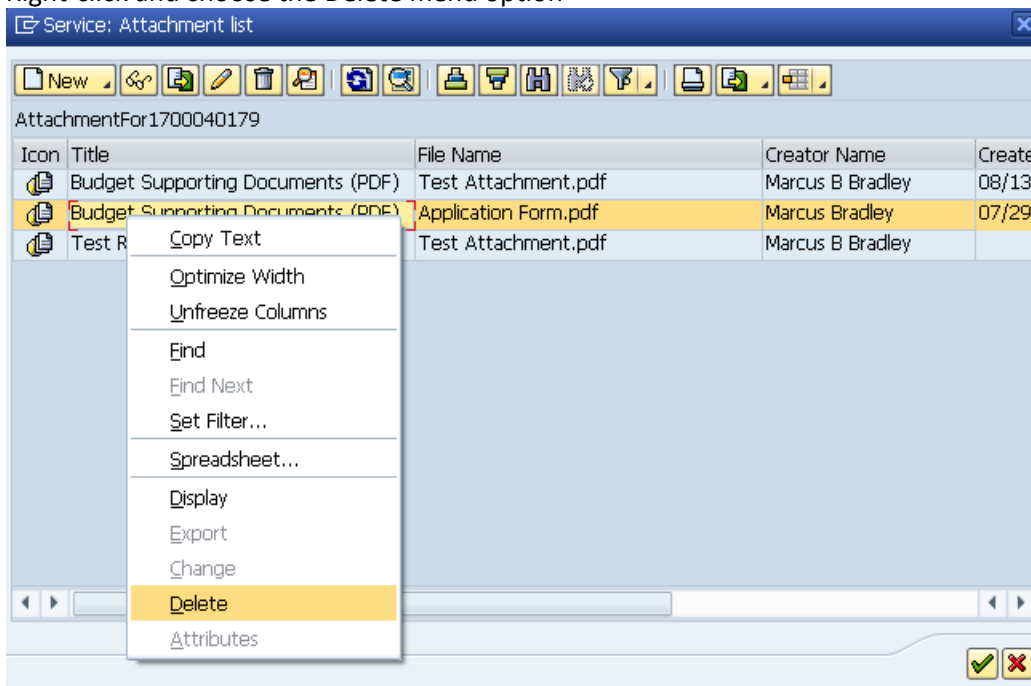
1.9 Delete from Attachment List

Select an attachment and click the Delete icon

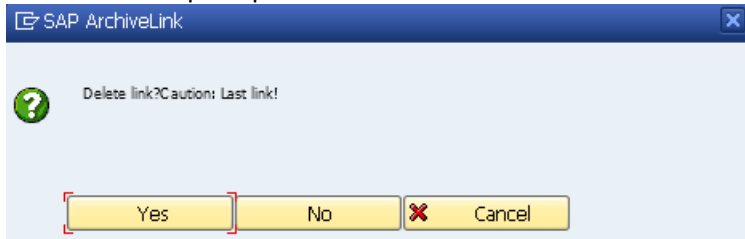


OR

Right-click and choose the Delete menu option

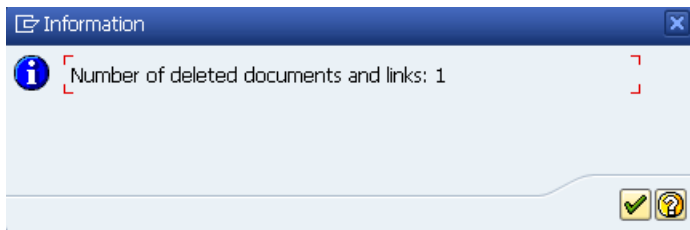
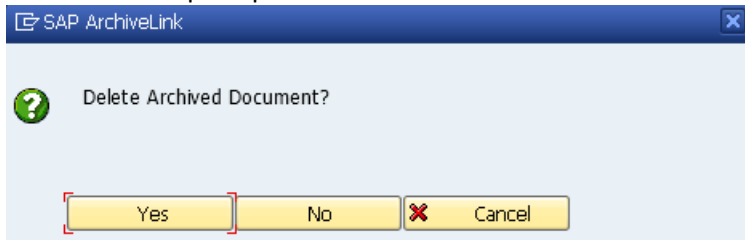


Click Yes when prompted to Delete link



The attachment will open.

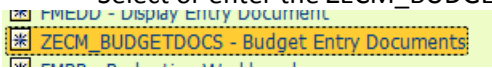
Click Yes when prompted to Delete Archived Document



2 Work with Attachments in the Budget Entry Document Attachments View

2.1 Access the Budget Entry Document ZECM_BUDGETDOCS

Select or enter the ZECM_BUDGETDOCS t-code



2.2 Enter selection criteria in the available fields (single, multiple, and range)

Selection Budget Entry Documents

Fiscal Year		to		↕
FM Document Number		to		↕
Financial Management Area		to		↕
Budget Category		to		↕
Department Code		to		↕
User Who Created or Updated		to		↕
Date Created or Updated		to		↕
Document Type		to		↕
Document Status		to		↕
Budget Version		to		↕
Grant		to		↕
Fund		to		↕
Funds Center		to		↕
Commitment Item		to		↕
Functional Area		to		↕
Funded Program		to		↕
GM Document Number		to		↕

Execute (F8)

Budget Entry Supporting Documents

Company Code: UK00


Expand the view or highlight Company Code and click the Expand All button

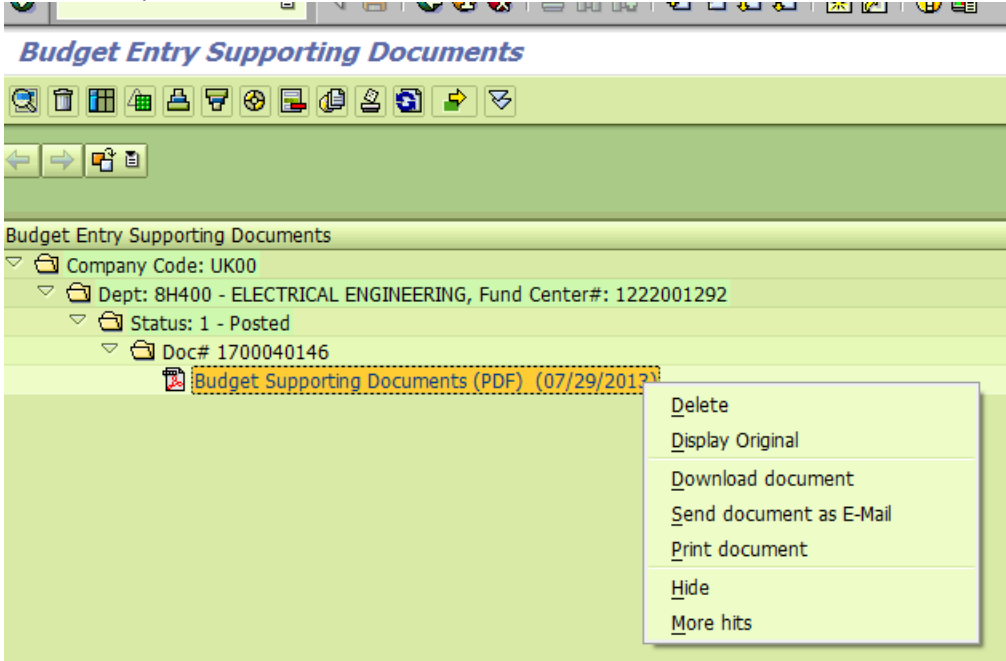
Budget Entry Supporting Documents

- Company Code: UK00
 - Dept: 8H400 - ELECTRICAL ENGINEERING, Fund Center#: 1222001292
 - Status: 1 - Posted
 - Doc# 1700040146
 - Budget Supporting Documents (PDF) (07/29/2013)

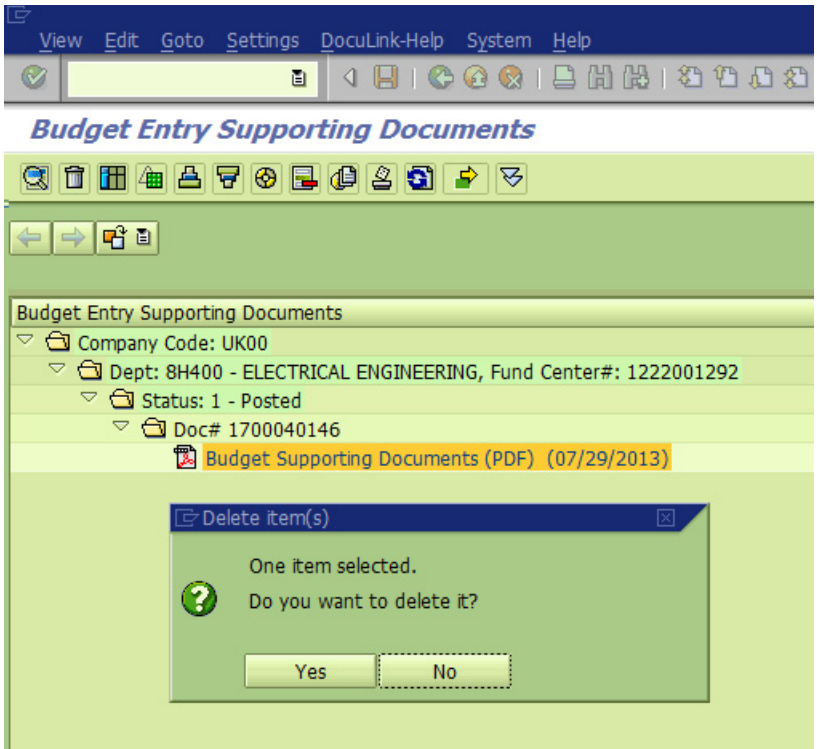
2.3 Open an Attachment

Double-click an attachment
PDF files will open in WebViewer
Other files will open in the appropriate local application

- 2.4 Delete from the Budget Entry Supporting Documents ZECM_BUDGETDOCS
Select an attachment and click the Delete Data icon (Ctrl-F7)  OR right-click and choose Delete from the menu options

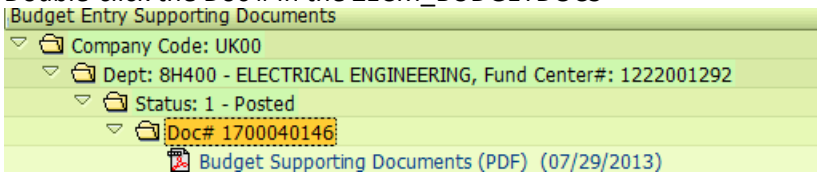


Click Yes when prompted to Delete Item(s)



3 Integration

- 3.1 Drill into FMEDD from the ZECM_BUDGETDOCS
- Double-click the Doc # in the ZECM_BUDGETDOCS



Document Edit Goto Environment System Help

Entry Document

Header Additional Data

Document 1700040146 Status Posted Document Year 2014 FM Area UK00
 Process Enter Total 10,000.00 USD
 BCS Value Type Budget
 Budget Category Payment Version 0 Fiscal Year 2014
 Document type GM Document Date 09/01/2013

Year Periods

Line	Grant	Fund	Funds Center	Cmmt It...	F.Ar	Fun...	Type	Amount TC	LC	DK	Text
0000...	30481...	0226000060	1222001292	510000	0320	NR	GR...	3,333.00	USD	1	
0000...	30481...	0226000060	1222001292	530010	0320	NR	GR...	667.00	USD	1	
0000...	30481...	0226000060	1222001292	590020	0320	NR	GR...	1,000.00	USD	1	
0000...	30481...	0226000060	1222001292	415000	0320	NR	GR...	4,000.00	USD	1	
0000...	30481...	0226000060	1222001292	475000	0320	NR	GR...	1,000.00	USD	1	

- 3.2 Drill into the ZECM_BUDGETDOCS from FMEDD or FMEDDW
Click the drop-down arrow on the Services for Object button

Line	Grant	Fund	Funds Center	Cmnt It...	F.Ar	Fun...	Type	Amount TC	LC	DK	Text
0000...	30490...	0226000000	1222001611	510000	0220	NR	GR..	8,993.00	USD	1	
0000...	30490...	0226000000	1222001611	513100	0220	NR	GR..	5,558.00	USD	1	
0000...	30490...	0226000000	1222001611	530010	0220	NR	GR..	25,506.00	USD	1	
0000...	30490...	0226000000	1222001611	530000	0220	NR	GR..	18,000.00	USD	1	
0000...	30490...	0226000000	1222001611	590020	0220	NR	GR..	11,611.00	USD	1	
0000...	30490...	0226000000	1222001611	415000	0220	NR	GR..	58,057.00	USD	1	
0000...	30490...	0226000000	1222001611	475000	0220	NR	GR..	11,611.00	USD	1	

Budget Entry Supporting Documents

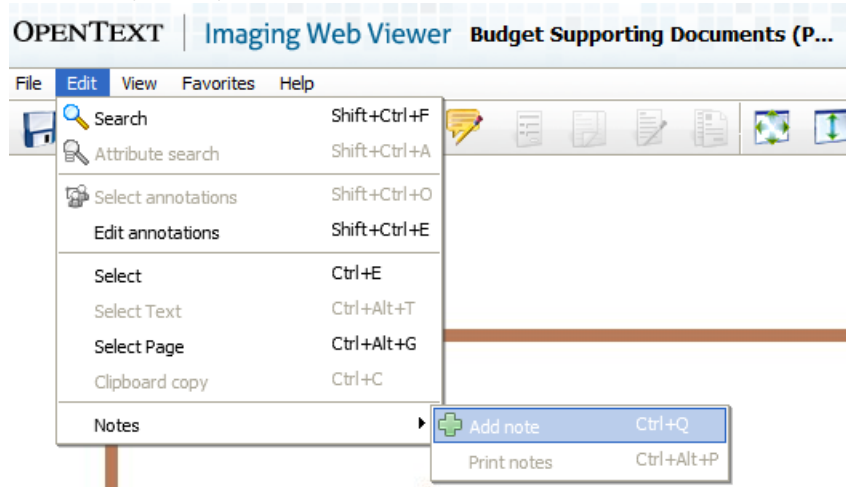
- Company Code: UK00
 - Dept: 8H400 - ELECTRICAL ENGINEERING, Fund Center#: 1222001292
 - Status: 1 - Posted
 - Doc# 1700040146
 - Budget Supporting Documents (PDF) (07/29/2013)

4 WebViewer

4.1 Open Document from the ZECM_BUDGETDOCS or Attachment List

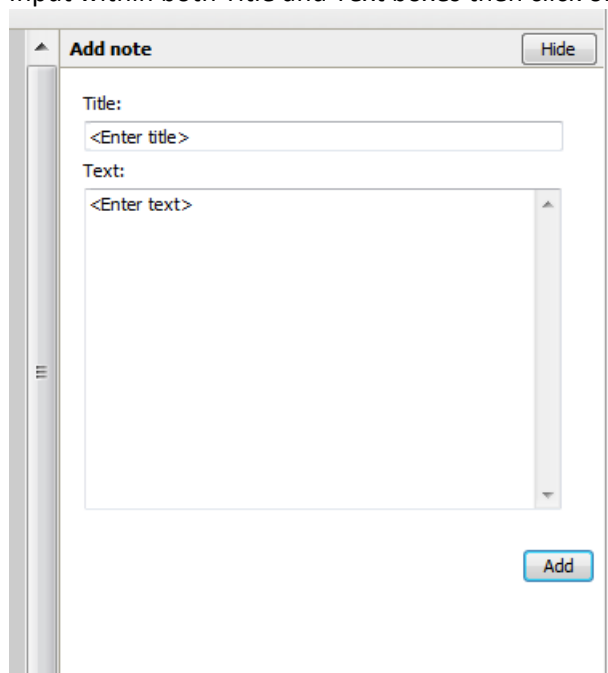
4.2 Create a Note:

Select Edit, Notes, Add Note



Note Panel Opens Up at the Right of the Document

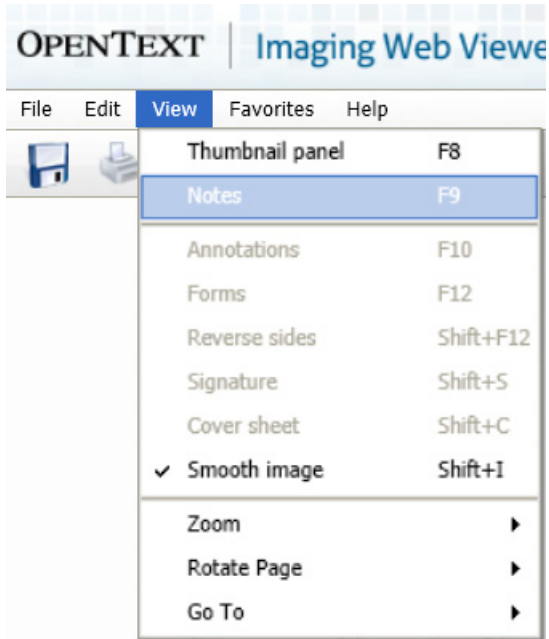
Input within both Title and Text boxes then click on the Add Button



- 4.3 Display the Notes Panel
Click on Toggle Notes Panel Icon



OR Select Notes from the View menu



OR press F9

OPENTEXT | Imaging Web Viewer | Work Order Notes/Forms (PDF) - ... | T-ECM018
Friday, March 1, 2013

File Edit View Favorites Help

100.0%

Retain a copy of this form within the department repository.
Send a copy of form to: RECORDS, 21A Sewall Hall

Phone Number (include
City
Home street address (include
PREVIOUS NAME
(if name has changed)
PRESENT NAME
LAST 4 DIGITS OF SO
PERSON ID.

Print notes + Add note Codepage

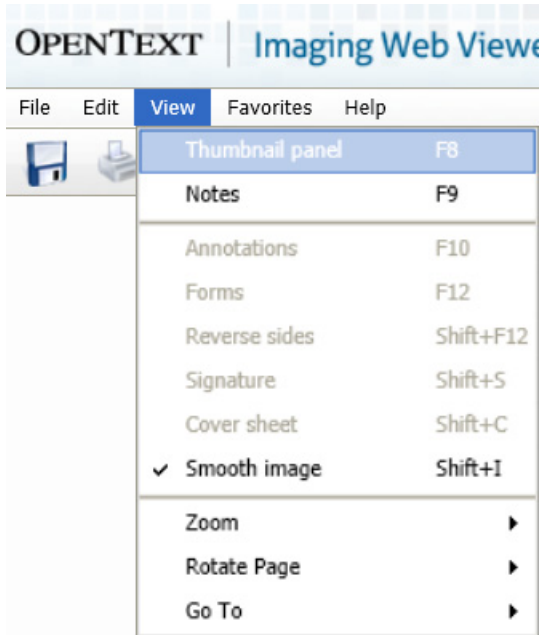
Title	User	Date	Text
Test Note	T-ECM018	Mar 01, 2013 13:47:12	This is a note!

1 / 2

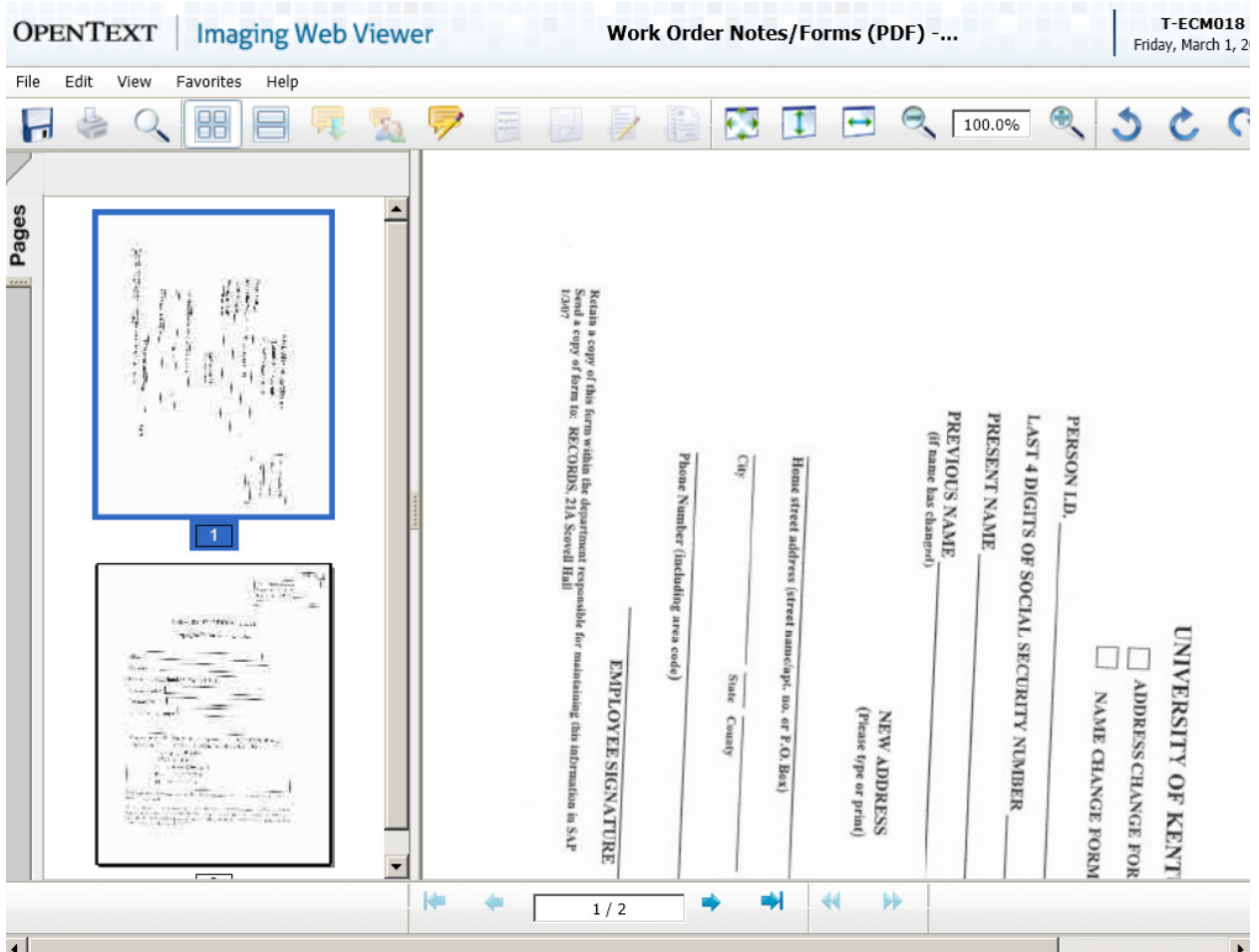
- 4.4 Display the Thumbnails Panel
- Click on Toggle Thumbnails Panel Icon



OR Select Notes from the View menu

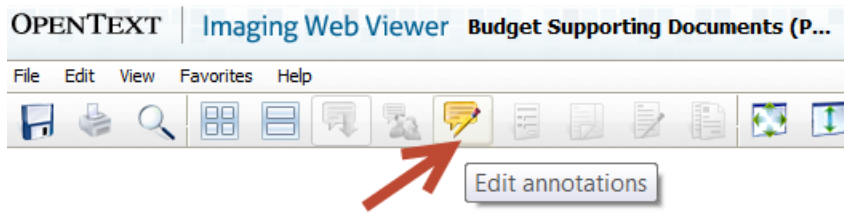


OR press F8



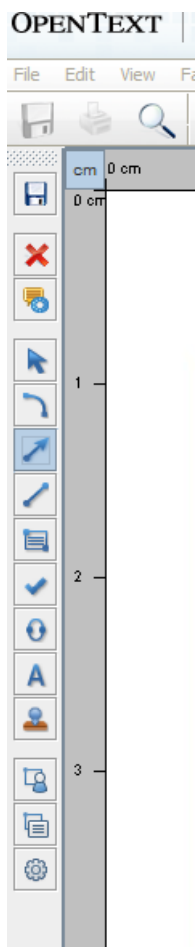
4.5 Create Annotations

Select Edit Annotations button below to create a new annotation on the document



Options to Add Annotations appear on the left side of the document

Select the type of annotations from the menu toolbar below and click on the document itself to begin. After you finish your annotations, please select the save button at the top of the annotations toolbar.



4.5 Display Annotations

The Toggle Annotations button will be enabled if annotations exist for this document



clicking this button will display or hide annotations

OPENTEXT | Imaging Web Viewer | Work Order Notes/Forms (PDF) - ... | T-ECM017
Friday, March 1, 2014

File Edit View Favorites Help

100.0%

UNIVERSITY OF KENT
 ADDRESS CHANGE FOR
 NAME CHANGE FORM

PERSON ID, _____
 LAST 4 DIGITS OF SOCIAL SECURITY NUMBER _____
 PRESENT NAME _____
 PREVIOUS NAME _____
 (If name has changed)

NEW ADDRESS
 (Please type or print)

Home street address (street name/cap, no. or P.O. Box) _____
 City _____ State _____ County _____
 Phone Number (including area code) _____

EMPLOYEE SIGNATURE _____

Retain a copy of this form within the department responsible for maintaining this information in SAP
 Send a copy of form to: RECORDS, 21A Scovell Hall
 10407

1 / 2

4.4 Select Annotations

Click on Select Annotations Panel Icon to activate Annotations Panel to the right of the document



OPENTEXT Imaging Web Viewer Work Order Notes/Forms (PDF) - ... T-ECM017 Friday, March 1, 2017

File Edit View Favorites Help

100.0%

Annotations

User

- T-ECM017
- T-ECM018

Select all Deselect all

Submit

UNIVERSITY OF KEN
 ADDRESS CHANGE F
 NAME CHANGE FO

PERSON ID, _____
LAST 4 DIGITS OF SOCIAL SECURITY NUMBER _____
PRESENT NAME _____
PREVIOUS NAME _____
(if name has changed)

NEW ADDRESS
(Please type or print)

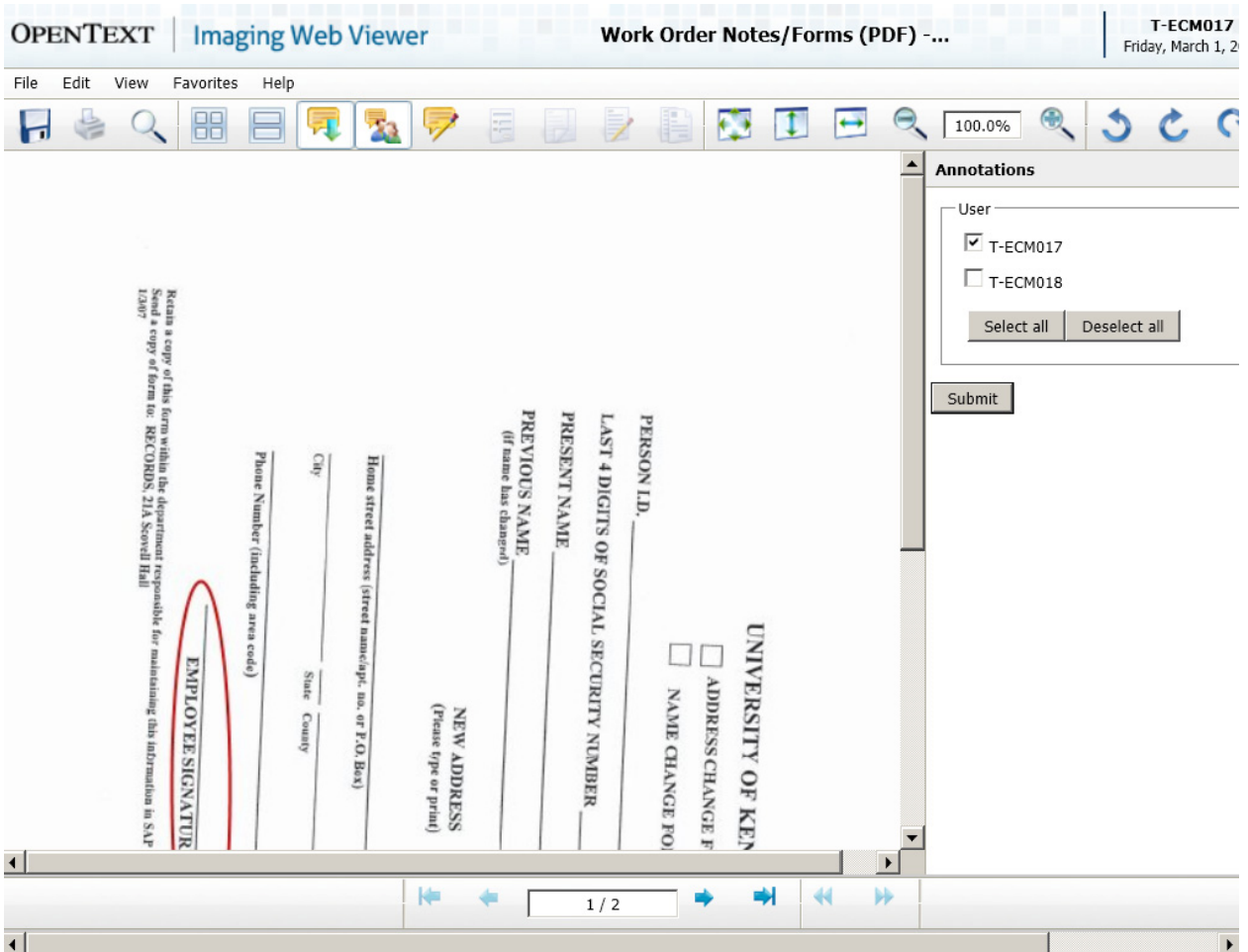
Home street address (street name/cap, no. or P.O. Box) _____
City _____ State _____ County _____
Phone Number (including area code) _____

EMPLOYEE SIGNATURE _____

Retain a copy of this form within the department responsible for maintaining this information in SAP
Send a copy of form to: RECORDS, 21A Scott Hall
10407

1 / 2

Users can choose to display or hide annotations created by different users by checking/unchecking the checkboxes and clicking the Submit button



- 4.5 Rotate Document
Click on Rotate Left, Rotate Right, or Flip buttons as needed for the document



- 4.6 Document Fit to Screen
Click the Fit to Screen, Fit to Height, or Fit to Width buttons as needed for a document



- 4.7 Menu options – Save As
Click on File menu in the top left of the window.



A panel is displayed to the right of the document that allows the user to specify options such as color, pager range, whether or not to include any annotations and notes, etc.
Click the Save as button when ready

General

Output format: Tagged Image File Format (TIF) ▼

Color: True Color (24 Bit) ▼

Original size

Original orientation

Page range

All

Current page

Pages from 1 to 2

Advanced

Quality: 100 % ▼

Annotations

Form

Reverse sides

Watermark

Notes

Save as

4.7 Menu options – Send by E-mail

Click on File menu in the top left of the window.

A panel is displayed to the right of the document that allows the user to specify options such as color, pager range, whether or not to include any annotations and notes, etc.
Click the Send via Mail Client button when ready

General

Output format: Tagged Image File Format (TIF) ▼

Color: True Color (24 Bit) ▼

Quality: 100 % ▼

Page range

All

Current page

Pages from 1 to 2

Advanced

Annotations

Form

Reverse sides

Watermark

Notes


Send via Mail Client


4.7 Menu options – Send by E-mail

Click on File menu in the top left of the window.

A panel is displayed to the right of the document that allows the user to specify options such as color, pager range, whether or not to include any annotations and notes, etc.
Click the Print button when ready


General

 Color: True Color (24 Bit) ▼

 Print format: A4 (210 x 297 mm) margins 10,10,10,10 ▼

Page format

Automatic Orientation

 Portrait

Landscape


Page range

All

Current page

Pages from to

Advanced

 Quality: 100 % ▼

Annotations

Form

Reverse sides

Watermark

Notes

Print