

**Job
Aid**

Upload Attachments in Umoja



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Overview

As a strategy towards reducing its carbon footprint, the United Nations has a target to become paperless wherever feasible. Umoja supports this by facilitating the attachment of scanned documents into relevant transactions within the system, thus reducing the need for multiple copies and allowing access to the scanned documents by authorized parties from any UN location.

Scanned documents attached to Umoja Transactions will be considered to be **original documents from a trusted source**, provided the following guidelines are followed:

- If received via email, the original document is considered to be the combination of the email message as well as the attached document. Both should be attached into the corresponding transaction in Umoja
- If received via postal mail or hand delivery, the original document is considered to be the document itself
- The scanned version of that document attached to the corresponding Umoja transaction will also be considered an original document from a trusted source

This document aims to provide basic guidelines on how to upload (attach) documents in Umoja transactions. The solution adopted by Umoja is “Records Management” which is an integration solution that allows the creation of record associated to specific SAP transactions. These tips are related to file naming, extension and size. The use of good naming convention, authorized file extensions, and reasonable file size will help enhance the Umoja user experience in terms of documents upload as well as performance. It will also help maintain the system’s integrity, stability, and health. The system automatically self protects itself by restricting certain file names and extensions. Please see Attachments file naming convention and File name extensions section for more details. The use of small file sizes should help improve performance in uploading and viewing documents, please see recommendations under the File size recommendation section for more details.

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Support

If any issue is encountered in Production, please contact your Local Process Expert and/or your Local Service Desk immediately. They will escalate the incident and monitor it through its resolution.

Please provide the following information:

- SAP Transaction identification and document number associated to transaction
- Description of the issue you are facing; print screens are extremely useful to expedite resolution

Should you require assistance during testing, please contact your designated Umoja Testing Functional Coordinator.

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1. Umoja Business Scenarios with Active Attachment Functionality

In order to address specific business requirements, Umoja has been configured to allow the attachment of documents in the following sub-set of business scenarios:

- In SAP ECC
 - Financial documents with workflow
 - Financial documents without workflow
 - Funds Commitment / Pre-Commitment / Budgeting
 - Sales & Distribution: Contract / Quotation / Billing / Sales Orders
 - Logistic & Execution: Good Receipt / Service Entry Sheet / Deliveries / Purchase Orders
 - Architectural Objects in Real Estate
 - Grants Management Budget Approval and GM Master
- In SAP SRM
 - Will allow for uploading of any relevant documents to Shopping Carts, Solicitations, Contracts and Purchase Orders

The attachment of documents in Umoja has been configured to address different requirements, depending on the nature of each type of document. For example: once a financial transaction is approved and posted, it should not be possible to change it further. Such restriction also applies to the Original Documents attached to the transaction. On the other hand, Real Estate documents (architectural objects, portfolios, etc.) may change on a regular basis, and so, the system configuration allows for new documents after a Real Estate entry has been saved in the system.

In addition, SAP provides different approaches for scanning documents, depending on whether the user is working in ECC or in SRM.

The following sections explain the particularities of attachments in Umoja, by type of transaction.

1.1 Financial Documents with Workflow

Before a financial document is posted in the system, the required Original Document should be attached to the corresponding SAP transaction. It will be possible to attach documents during the whole cycle of each workflow-supported document, as long as such document has not been approved and posted in the system. This means users will be able to continue uploading attachments to a particular transaction as far the document is in status “park” or “save as complete” the user

Note: The status of the attached Original Documents and the status of the corresponding transaction in SAP are not synchronized automatically, and thus users must be mindful of making attachments final by “closing” the scanned record. Therefore, transaction approvers must change the status of the attached document to “Closed” at the time of posting the document.

The final approver is responsible for validating the transaction supporting documentation before posting any financial entry in Umoja. This also entails closing the corresponding document management record so that the attached original documents cannot be modified any longer.

If the approver determines that the information provided are insufficient (i.e., attachments are missing or are incomplete) the workflow approver should reject the financial document and request that the creator to attach/modify the documents. Once the supporting Original Documents are validated and accepted by the final approver, the document management record attached to the transaction must closed in concurrence with the posting of the financial document.

1.2 Financial Documents without Workflow

Not all documents in the Finance modules are processed through workflow. In some cases, the attachments will be uploaded in the Financial Accounting Document only after the document is saved. The creator of the document will be responsible, as well, for closing the scanned record or Original Document associated to the financial documents, so that they cannot be further modified.

The following table lists the Finance documents that can receive attachments in Umoja, together with the corresponding transaction and the types of Original Documents that should be attached:

Application	Attachment via Transaction	SAP Descriptions	Alternative Transaction for Attaching Documents	Original Documents to Be Attached
Finance	FV50	Park G/L Account Document	FV53 / FB03	Calculation spreadsheet, memo & emails
Finance	FV60	Park Vendor Invoice	FV63 / FB03	Vendor Invoice
Finance	FV65	Park Vendor Credit Memo	FV63 / FB03	Vendor Credit Note

Finance	FV70	Park Customer Invoice	FV73 / FB03	Calculation spreadsheet, memo & emails
Finance	FV75	Park Customer Credit Memo	FV73 / FB03	Calculation spreadsheet, memo & emails
Finance	MIR4	Display Invoice Document		Calculation spreadsheet, memo & emails

The following table lists the Financial Management documents that can receive attachments in Umoja, together with the corresponding transaction and the types of Original Documents that should be attached:

Application	Attachment via Transaction	SAP Descriptions	Alternative Transaction for Attaching Documents	Original Documents to Be Attached
Financial Management	FMY3	Funds Pre-Commitment	FMY2	Memo, Agreements, MOUs
Financial Management	FMZ3	Funds Commitment	FMZ2	Memo, Agreements, MOUs
Financial Management	FMBB	Budgeting Work bench	FMEDD	Memo, Final Approval Instructions
Financial Management	FMX3	Funds Reservation	FMX2	Memo, MOUs
Financial Management	FMW3	Funds Block	FMW2	Memo, Agreements, MOUs
Financial Management	FMY3	Funds Pre-Commitment	FMY2	

1.3 Logistics

List of transactions available where documents can be attached:

Application	Attachment via Transaction	SAP Descriptions	Alternative Transaction for Attaching Documents	Original Documents to Be Attached
Logistic		Deliveries	FM2	Shipping Notification, Vendor Delivery Confirmation, Custom Documents, Correspondence (email & memos), Internal Supporting Documents
Logistic	MIGO	Good Movements	FM22	Receiving Documents, Vendor Returns, Correspondence (email & memos), Internal Supporting Documents
Logistic	ML81N	Service Entry Sheet		Supporting Documents

1.4 Real Estate

In Real Estate, the scanned records associated to each transaction will not be closed. These types of documents are constantly uploaded and do not required approval.

Application	Attachment via Transaction	SAP Descriptions	Alternative Transaction for Attaching Documents	Original Documents to Be Attached
Real Estate	REBDAO	Process Architectural Object	RE80	Portofolio Documents, Internal Documents
Real Estate	REBDDBE	Process Business Entity	RE80	Portofolio Documents, Internal Documents
Real Estate	REBDPR	Process Land	RE80	Portofolio Documents, Internal Documents
Real Estate	REBDDBU	Process Building	RE80	Portofolio Documents, Internal Documents

Real Estate	REBDRO	Process Rental Object	RE80	Portofolio Documents, Internal Documents
Real Estate	RECN	Process Contract	RE80	Contracts, Internal Documents

1.5 Plant Maintenance

In Plant Maintenance, the scanned records associated to each transaction will not be closed. These types of documents are constantly uploaded and do not required approval.

Application	Attachment via Transaction	SAP Descriptions	Alternative Transaction for Attaching Documents	Original Documents to Be Attached
Plant Maintenance	IE02 / IE03	Equipment	IE02/IE03	Equipment Assignment / Impairment Documents / Technical Documents / Transfer Documents / Write Off – Disposal Supporting Documents / Internal Supporting Documents
Plant Maintenance	IW32 / IW33	Work Order		Approval Documents/ Material & Operation Confirmation / Internal Supporting Documents
Plant Maintenance	IW53 / IW52	Service Notification		Sales & Services Order Documents / Write Off – Disposal Approvals / Internal Supporting Documents

1.6 Sales and Distribution

In Sales & Distribution, the scanned records associated to each transaction can be closed as they are linked to an approval process.

Application	Attachment via Transaction	SAP Descriptions	Alternative Transaction for Attaching Documents	Original Documents to Be Attached
Sales & Distribution	VA42	Customer Contract		Purchasing Documents / Solicitations / Internal Order & Request / Disposal & Approval / Sales Contract / MOU / SLA / Claim & Other Supporting Documents
Sales & Distribution	VA22 / VA23	Customer Quotation		Purchasing Documents / Solicitations / Internal Order & Request / Disposal & Approval / Sales Contract / MOU / SLA / Claim & Other Supporting Documents
Sales & Distribution	VA02 / VA03	Sales Order		Purchasing Documents / Solicitations / Internal Order & Request / Disposal & Approval / Sales Contract / MOU / SLA / Claim & Other Supporting Documents
Sales & Distribution	VF02 / VF03	Customer Billing Document		Payment Documents / Funds Commitment Dcmt. / Other Supporting Documents

1.7 Grants Management

In Grants Management, the scanned records associated to Grants Management will not be closed. These types of documents are constantly uploaded at different stages of the Grants Management Process to Grant Master Data Object (Grants) and do not required approval.

Note that only final and signed or approved documents in PDF format should be uploaded in the system, i.e., no intermediary documents should be uploaded in the system.

The following transactions can be used to upload documents to a Grant or Grants Budget document:

Application	Attachment via Transaction	SAP Descriptions	Alternative Transaction for Attaching Documents	Original Documents to Be Attached
Grants Management	GMGRANT	Maintain Grant		<ul style="list-style-type: none"> Agreements with Donor Agreements with IP Budgetary related documents (if applicable) Substantive Reports to Donor Financial Reports to Donor Substantive Reports from IP Financial Reports from IP Other Communication
Grants Management	GMGRANTD	Display Grant		<ul style="list-style-type: none"> Agreements with Donor Agreements with IP Budgetary related documents (if applicable) Substantive Reports to Donor Financial Reports to Donor Substantive Reports from IP Financial Reports from IP Other Communication
Grants Management	GM_CREATE_BUDGET	Create Budget Document		<ul style="list-style-type: none"> Agreements with Donor Agreements with IP Budgetary related documents (if applicable)

				<p>Substantive Reports to Donor</p> <p>Financial Reports to Donor</p> <p>Substantive Reports from IP</p> <p>Financial Reports from IP</p> <p>Other Communication</p>
Grants Management	GM_BDGT_REL EASE	Release Budget		<p>Agreements with Donor</p> <p>Agreements with IP</p> <p>Budgetary related documents (if applicable)</p> <p>Substantive Reports to Donor</p> <p>Financial Reports to Donor</p> <p>Substantive Reports from IP</p> <p>Financial Reports from IP</p> <p>Other Communication</p>
Grants Management	GM_DISPLAY_ BUDGET	Display Budget Document		<p>Agreements with Donor</p> <p>Agreements with IP</p> <p>Budgetary related documents (if applicable)</p> <p>Substantive Reports to Donor</p> <p>Financial Reports to Donor</p> <p>Substantive Reports from IP</p> <p>Financial Reports from IP</p> <p>Other Communication</p>
Grants Management	GM_MODIFY_ BUDGET	Change Budget Document		<p>Agreements with Donor</p> <p>Agreements with IP</p> <p>Budgetary related documents (if applicable)</p> <p>Substantive Reports to Donor</p> <p>Financial Reports to Donor</p> <p>Substantive Reports from IP</p> <p>Financial Reports from IP</p> <p>Other Communication</p>

2. Record Models and Attachments

In order to help users organize and retrieve attachments in Umoja, a “Record Model” has been configured for each transaction that requires attachments.

The Record Model defines the folder structure as well as the document attributes (the type of document) required and helps to correctly classify each attachment, for easy identification and retrieval.

When a user enters a transaction that has been configured to receive attachments, a record model is automatically created and linked to the transaction.

The record model (folder structure) will change from one transaction to another.

The example below illustrates a record model for a financial document, with its corresponding folder structure and record attributes:

The user parks a vendor's invoice and access the Record Management

Display Parked Invoice Document 5100002938 2016

Show PO structure | Follow-On Documents ...

Trans: Incoming Invoice 5100002938 5100002938 2016

Basic data | Payment | Details | Tax | Contacts | Note

Invoice date	01.06.2016	Reference	REFERENCE DOC
Posting Date	08.06.2016		
Amount	1,932.15	USD	<input type="checkbox"/> Calculate tax
Tax Amount	0.00	V0 (Zero Tax)	
Text	Invoice for May 2016		
Paymt terms	Due immediately		
Baseline Date	01.06.2016		
Company Code	1000 United Nations New York		

The corresponding record model is automatically created and linked to the transaction.

Records Browser - Record "100011011798582016 (Version1)" Display

Attributes Record [Settings] [Refresh] [Print] [Copy] [Paste] [Delete] [Home] [Back] [Forward] [Close]

Browser [Refresh] [Link] 100011011798582016 Version 1

Short description	100011011798582016	
Unique Indicator	100011011798582016	
Language	EN	English
Creation Time	01.06.2016 12:20:41	
Created By	MALA	Mohammad Yousef ALA
Time of Change	01.06.2016 12:35:01	
Last changed by	MALA	Mohammad Yousef ALA
Version	1	
Keyword (1)		

Hierarchy	Element Type	Visibility	Last Processed	Nod...
100011011798582016			MALA / 01.06.2016 / ...	
• 100011011798582016	Accounting Document	All Roles	MALA / 01.06.2016 / ...	15
• Supporting Document		All Roles		1
• Correspondence (Emails & Me...		All Roles		7
• [email]	Correspondence : Emails...	All Roles	MALA / 01.06.2016 / ...	8
• [email supporting the proc...	Correspondence : Emails...	All Roles	MALA / 01.06.2016 / ...	8
• Internal Supporting Document		All Roles		11
• [Working sheet]	Internal Supporting Doc...	All Roles	MALA / 01.06.2016 / ...	16
• [Analysis Sheet]	Internal Supporting Doc...	All Roles	MALA / 01.06.2016 / ...	16

3. How to Access Records Management

The Record Management is a utility available for attaching documents in Umoja.

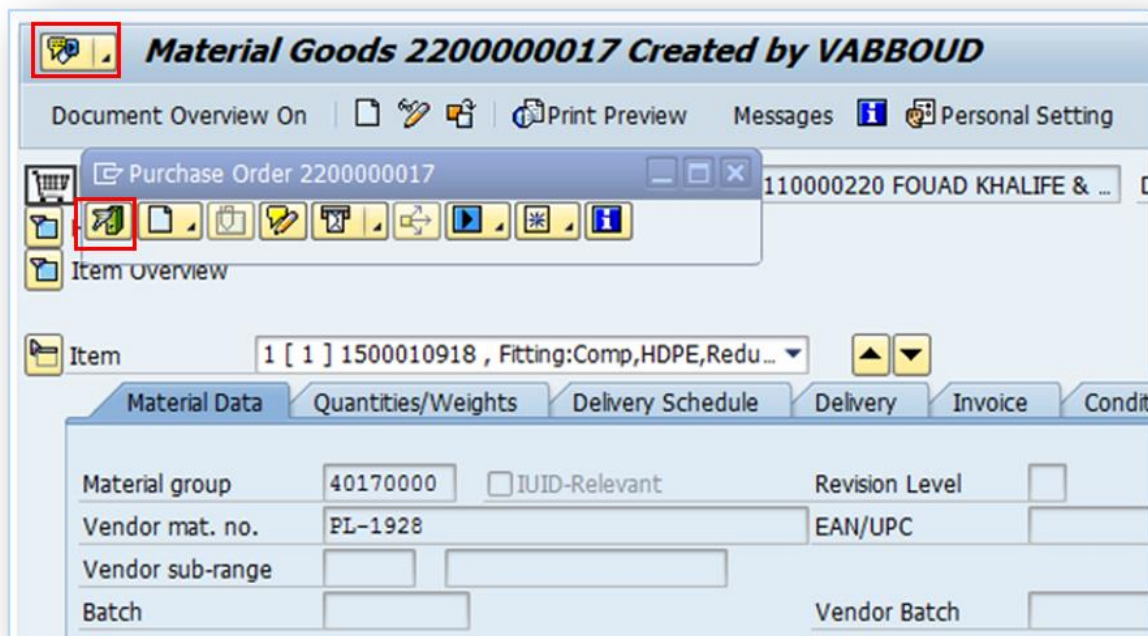
The Record Management can be accessed clicking the icon “**Service for Object**” from most of transaction screens available in Umoja. However, in few transactions the “records management option” is part of the standard SAP menu.

3.1 Finances, Logistic Execution, Service Delivery and Plant Maintenance

In the transactions associated with the Finance, Logistics, Service Delivery and Plant Maintenance modules, the Records Management can be accessed clicking the **Service for Object > Records Management** menu item.

A few examples:

- For Goods Receipt

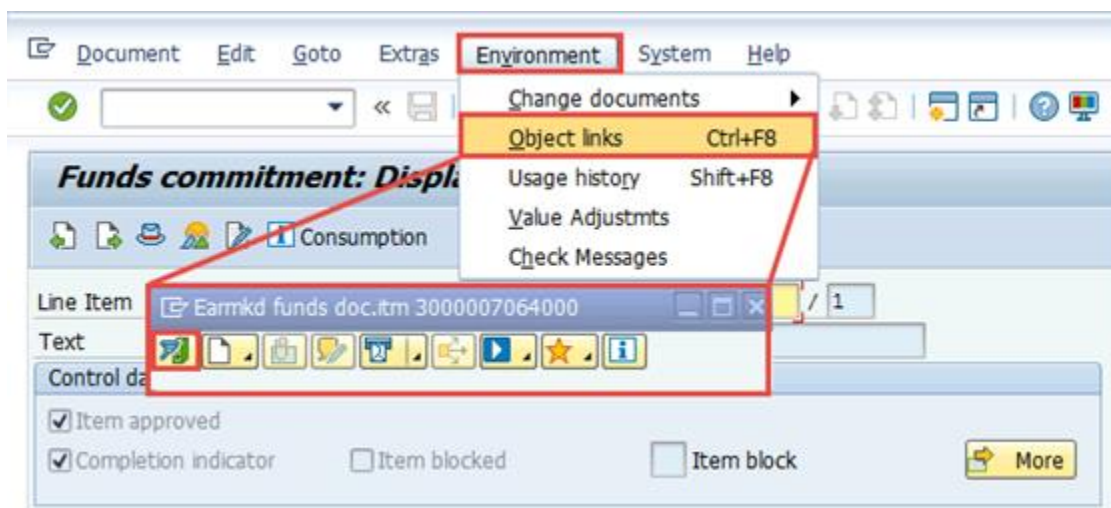


- For Sales Order



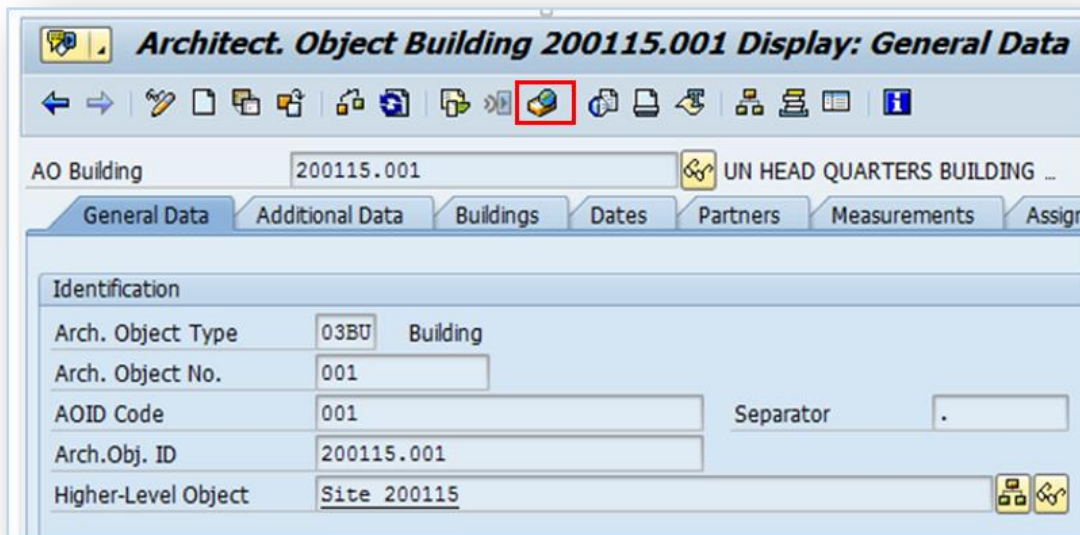
3.2 Earmarked Funds

For Funds Earmarked Documents, Records Management can be accessed through the menu by selecting the **Environment > Object links > Records Management** menu item.



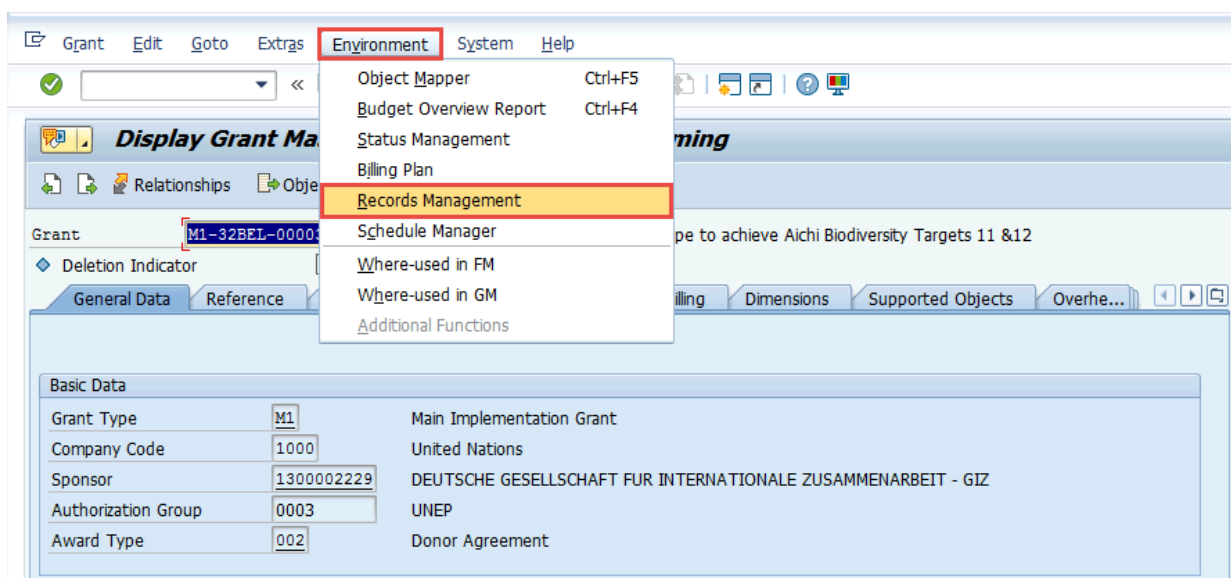
3.3 Real Estate

For Real Estate, Records Management can be accessed through the menu by selecting the **Document Management** icon.



3.4 Grants Management

For Grants Management Documents, Records Management can be accessed through the menu by selecting the **Environment > Records Management** menu item.



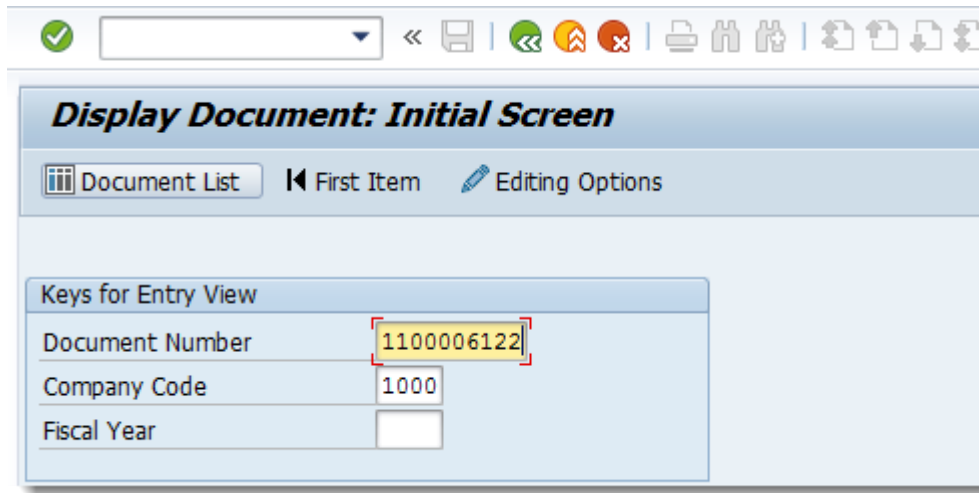
* * * * *

4. How to Attach Documents in Umoja: Examples

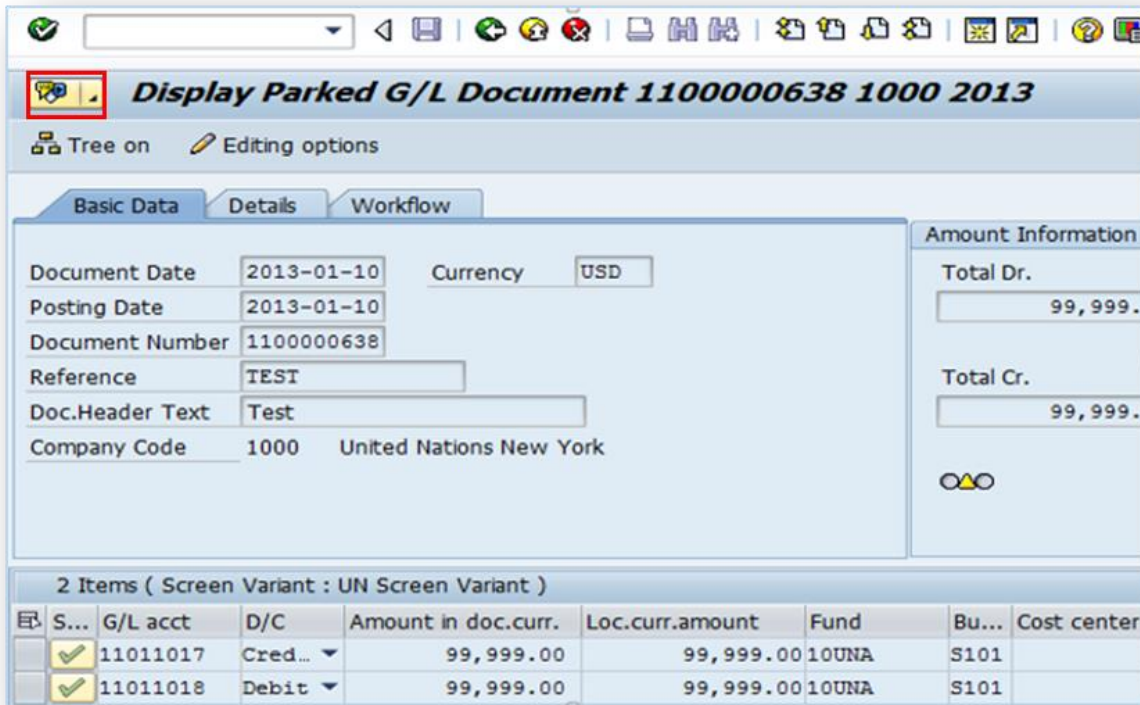
The following steps describe how to attach Account Payable (AP), Account Receivable (AR) and GL documents.

Process Steps:

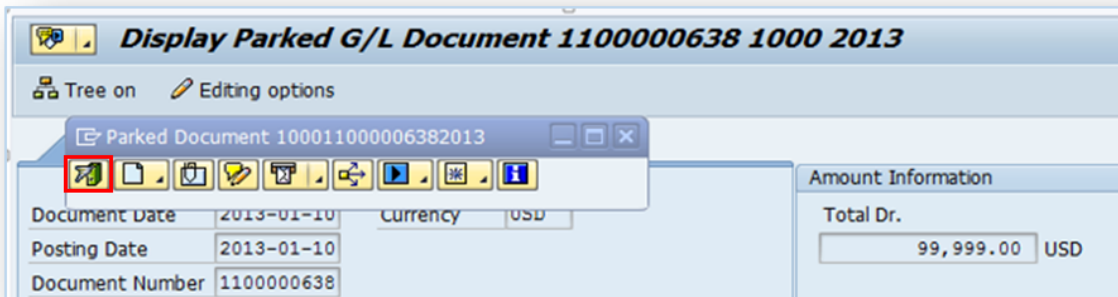
1. Enter **FB03** in the **Command** field to display the financial document generated by the system
2. Click the **Enter** icon
3. Enter the Document Number
4. Click **Enter** icon



5. Click the **Services for Object** icon

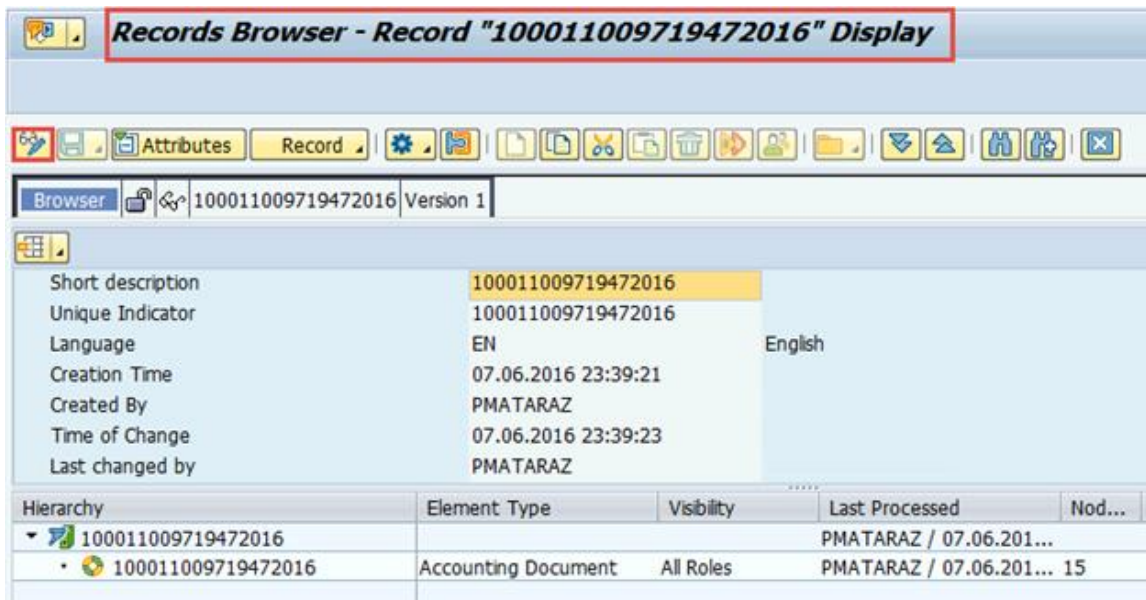


6. Click the **Record Management** icon.



7. The **Record Browser** screen is displayed

- Click the **Change** icon to edit the record and expand all sub nodes

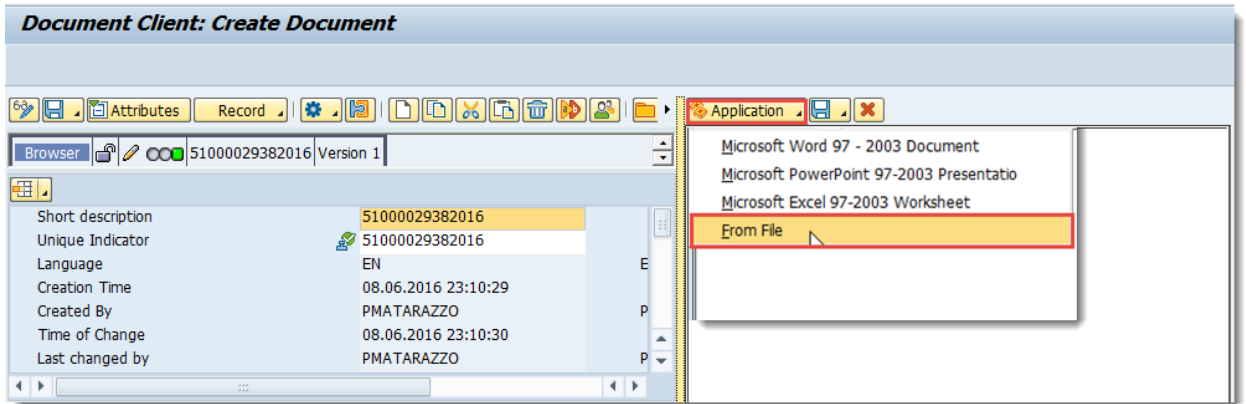


Hierarchy	Element Type	Visibility	Last Processed	Nod...
100011009719472016			PMATARAZ / 07.06.201...	
• 100011009719472016	Accounting Document	All Roles	PMATARAZ / 07.06.201...	15

- Double-click **Vendor Invoice & Credit Memo**.
- Alternatively right-click **Vendor Invoice & Credit Memo** and select the **Activities > Create** item

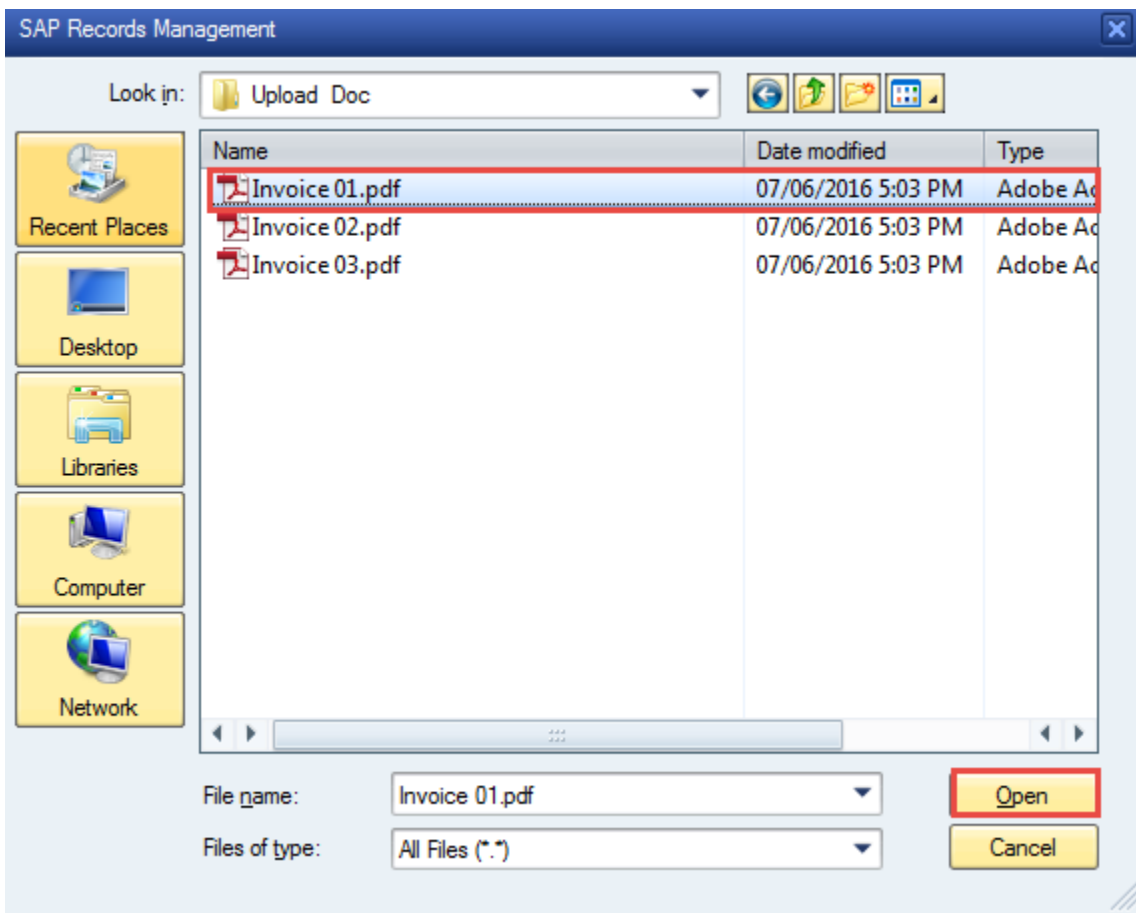
Hierarchy	Element Type	Visibility	Last Processed	Nod...
100011009719472016			PMATARAZ / 07.06.201...	
• Financial Document	Accounting Document	All Roles		15
• 100011009719472016	Accounting Document	All Roles	PMATARAZ / 07.06.201...	15
• Supporting Document		All Roles		1
• Original Document		All Roles		5
• Vendor Invoice & Credit Memo	Invoice & Credit Memo	All Roles		10
• Correspondence (Emails & Memos		All Roles		7
• Correspondence	Correspondence : Emails...	All Roles		8
• Internal Supporting Documents		All Roles		11
• Internal Supporting Document	Internal Supporting Doc...	All Roles		16

- To upload the document, attach the original document by clicking the **Application > From File** menu item
- Select **From File** menu item



13. Select the document from your system

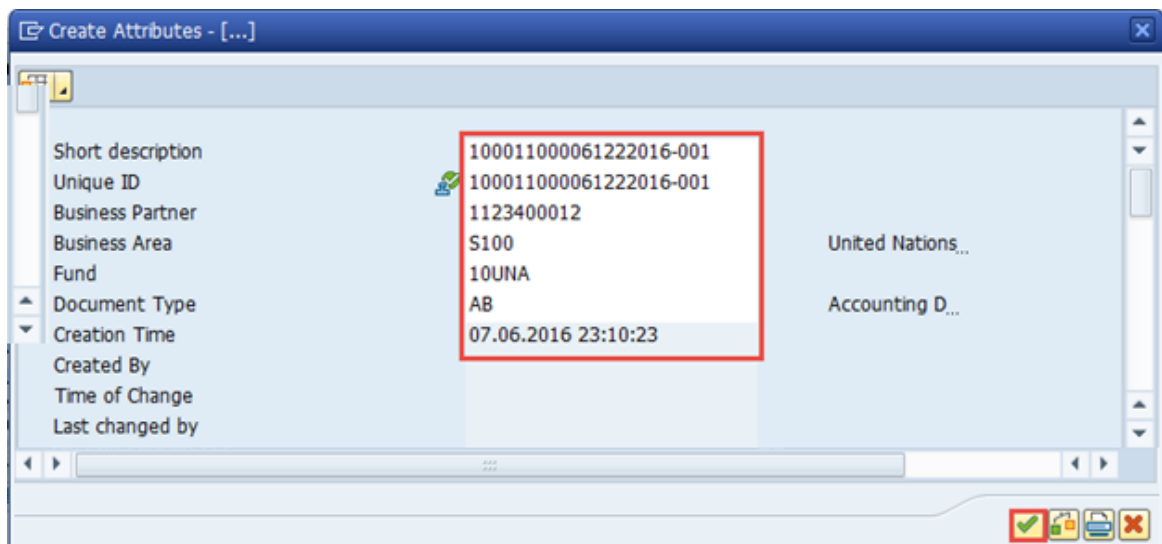
14. Click the **Open** button



15. To save the scanned document you need to assign attributes to the document by populating the key fields.
16. Click **Continue** (Enter) icon

Examples

- A. To save scanned financial documents populate the following attributes:
 - i. **Short description:** Copy **Unique ID** to **Short description** attribute
 - ii. **Unique ID:** Fiscal Year – Document Number – Sequential Doc Number
 - iii. **Business Partner**
 - iv. **Business Area**
 - v. **Fund**
 - vi. **Document Type**



- B. To save the scanned real estate document populate the following fields:
 - i. **Short description**
 - ii. **Unique ID**
 - iii. **Business Partner**
 - iv. **Authorization Group**

vii. Person Responsible

Short description	[...]
Unique ID	[...]
Authorization Group	[...]
Business Partner	
Person Responsible	
Creation Time	2013-07-09 00:18:09

Note: The Attributes can be used as parameters to search documents, therefore document with few attributes can be difficult to be retrieved

- 17. Verify that document is attached
- 18. Click the **Save** icon

Document Client: Create Document

The screenshot shows the 'Document Client: Create Document' interface. On the left, there is a 'Attributes' section with the following values:

- Short description: 100011000061222016
- Unique Indicator: 100011000061222016
- Language: EN
- Creation Time: 07.06.2016 22:05:10

Below the attributes is a 'Hierarchy' table:

Hierarchy	Element Type	Visibility
100011000061222016		
• Financial Document	Accounting Document	All Roles
• 100011000061222016	Accounting Document	All Roles
• Supporting Document		All Roles
• Original Document		All Roles
• Correspondence (Emails & Me...		All Roles
• Correspondence	Correspondence : Emails...	All Roles
• 100011000061222016-001	Correspondence : Emails...	All Roles
• Internal Supporting Document		All Roles

On the right, there is a preview of an 'INVOICE' document. The invoice header includes 'Your Company Name' and 'INVOICE'. The main body of the invoice is a table with columns for 'Description', 'Quantity', 'Unit Price', and 'Total Price'. The table contains two rows of data. At the bottom right of the invoice preview, there is a summary table:

TOTAL	8,236.53
TOTAL	8,236.53
TOTAL	8,236.53
TOTAL	8,236.53
TOTAL	8,236.53
TOTAL	8,236.53
TOTAL	8,236.53
TOTAL	8,236.53
TOTAL	8,236.53
TOTAL	8,236.53

5. How and When to Change Document's Attributes

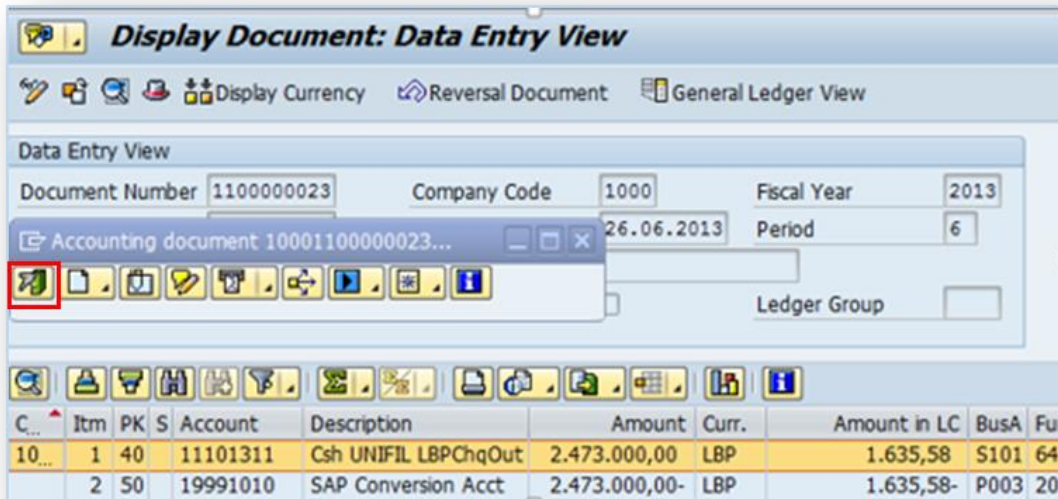
Documents uploaded into SAP need to be updated with the proper attributes such as: Short description, Unique ID, Funds, Business Partner, etc.

Some attributes can be changed after the document is uploaded while others that cannot be changed will remain gray out.

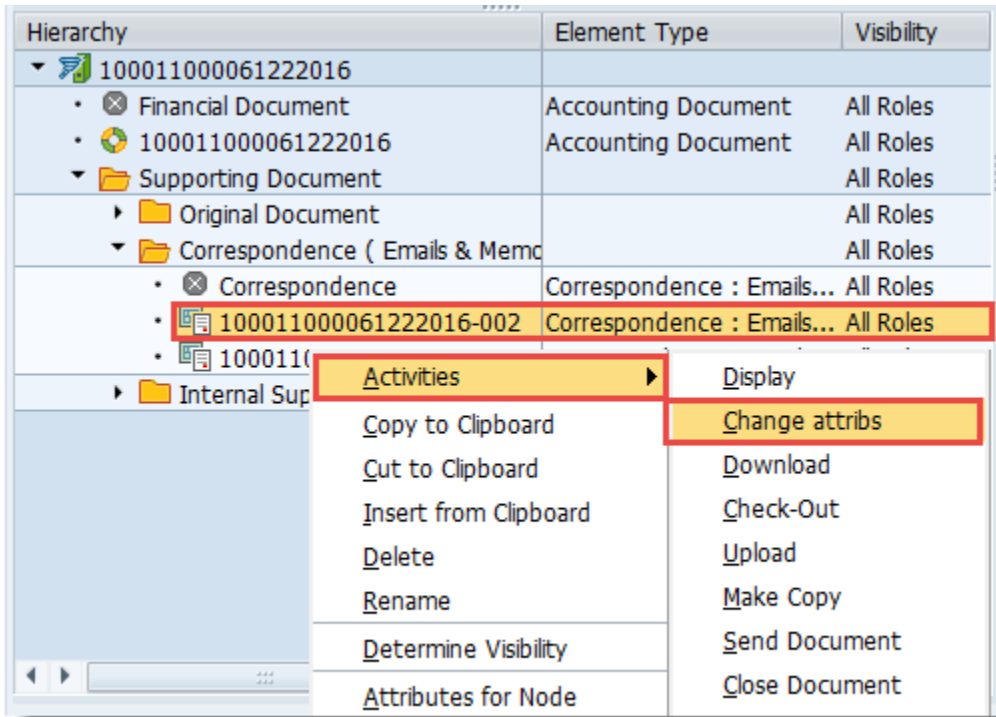
NOTE: If the attachments uploaded by mistake cannot be removed amend the **Short Description** adding the word "DO NOT USE" to the attribute

Process Steps

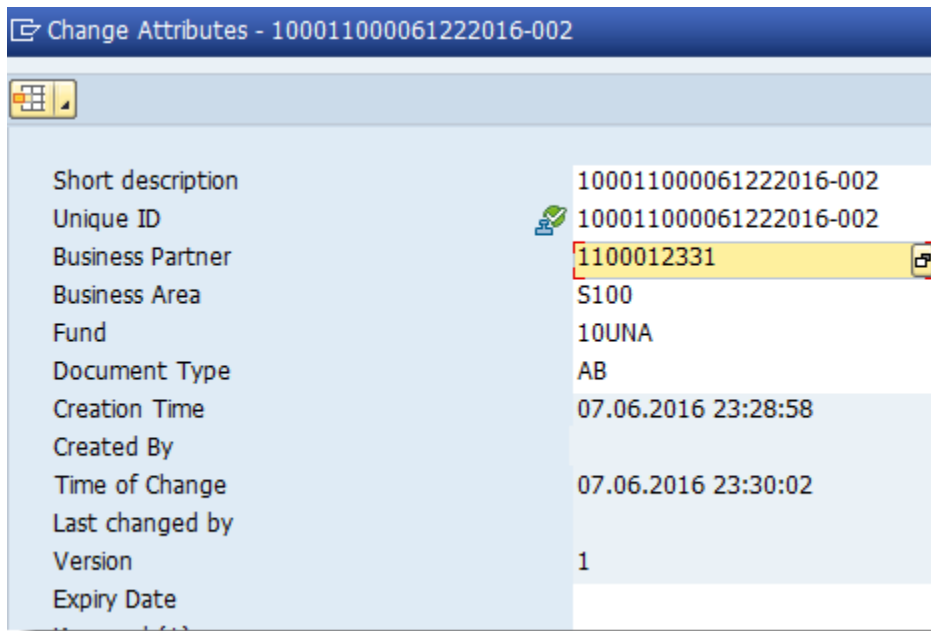
1. Select the record associated to transaction by clicking the **Record Management** icon



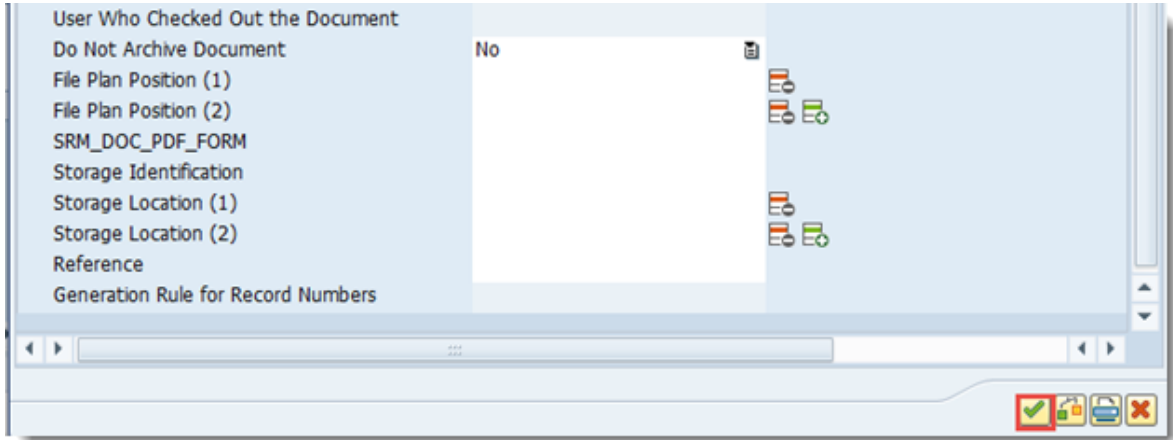
2. The **Record Browser** screen is displayed
3. Right-click the document and select the **Activities > Change attribs** item



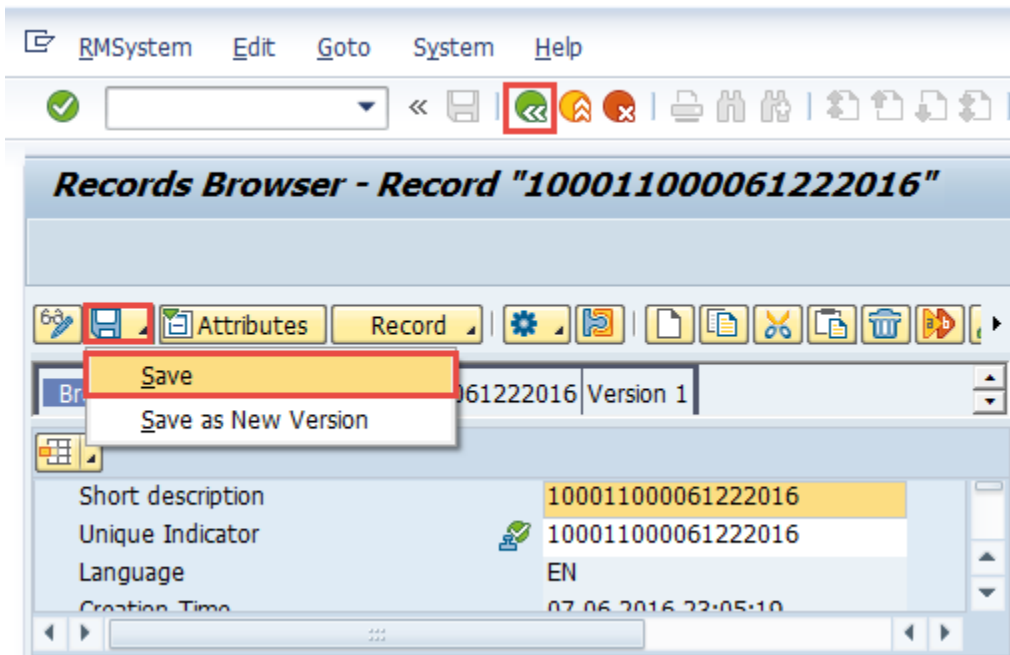
4. Change any of the attributes by modifying the fields that require amendment



- Click the **Continue (Enter)** icon to accept the changes



- Click the **Save** icon and select **Save** in the dropdown menu
- Click the **Exit** icon or **F3** to go back to original transaction

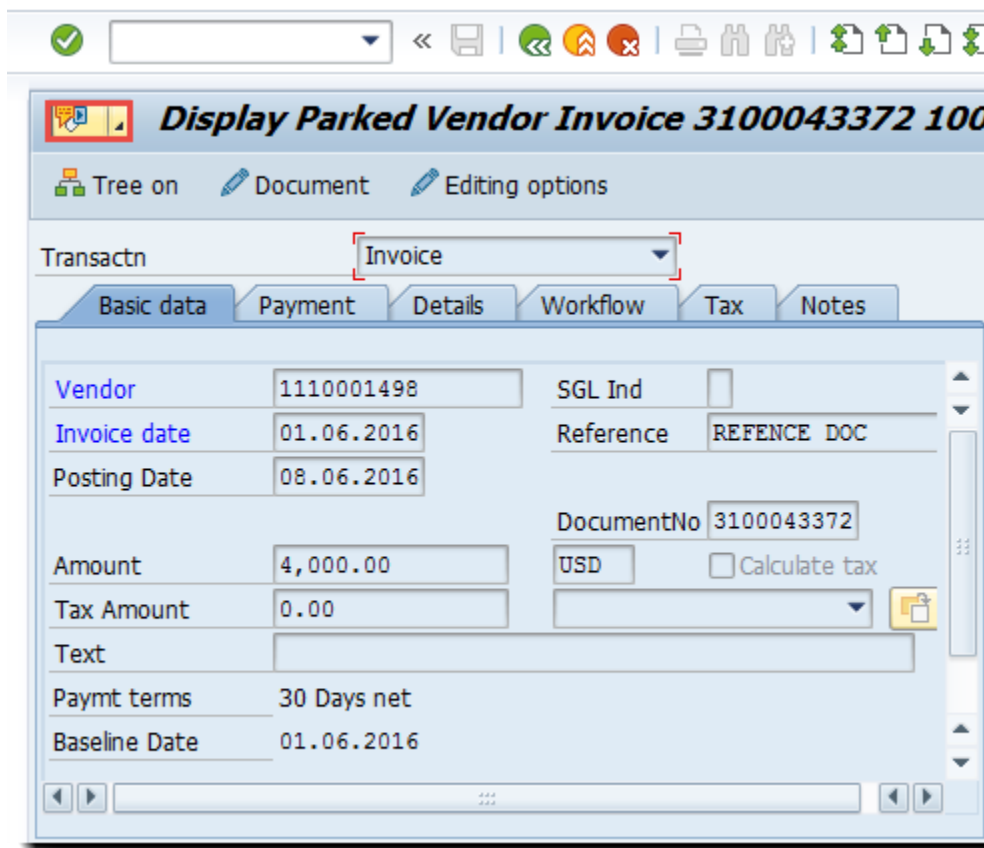


6. How to Close Records

In document with workflow, the final approver is responsible for closing the scanned record. After the record is closed, users will not be able to modify the documents or attach additional files.

Process Steps

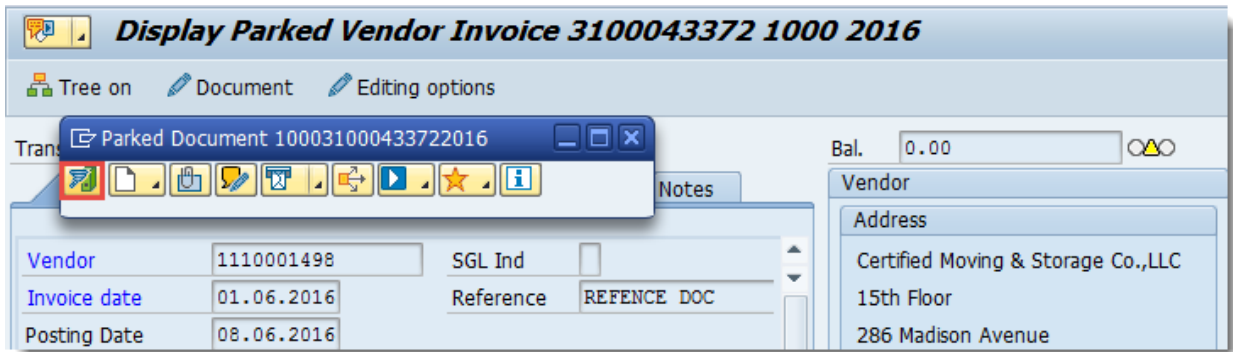
1. Enter **FB03** in the **Command** field to display the scanned financial document record, and click the **Enter** icon
2. Click the **Services for Object** icon



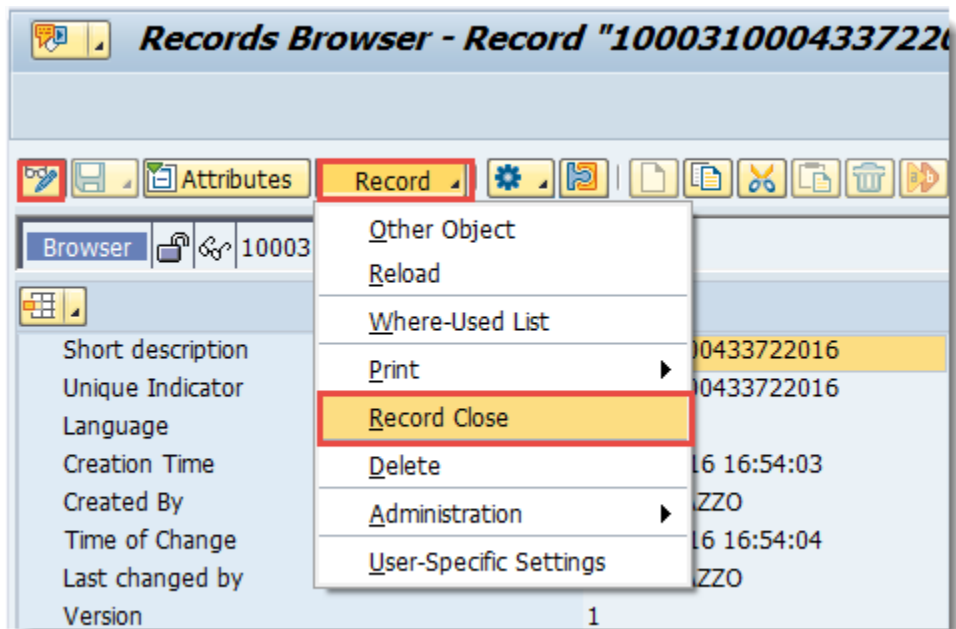
The screenshot shows the SAP 'Display Parked Vendor Invoice' window. The title bar reads 'Display Parked Vendor Invoice 3100043372 100'. Below the title bar, there are icons for 'Tree on', 'Document', and 'Editing options'. The 'Transactn' field is set to 'Invoice'. The window has several tabs: 'Basic data', 'Payment', 'Details', 'Workflow', 'Tax', and 'Notes'. The 'Basic data' tab is active, showing the following fields:

Vendor	1110001498	SGL Ind	
Invoice date	01.06.2016	Reference	REFENCE DOC
Posting Date	08.06.2016	DocumentNo	3100043372
Amount	4,000.00	USD	<input type="checkbox"/> Calculate tax
Tax Amount	0.00		
Text			
Paymt terms	30 Days net		
Baseline Date	01.06.2016		

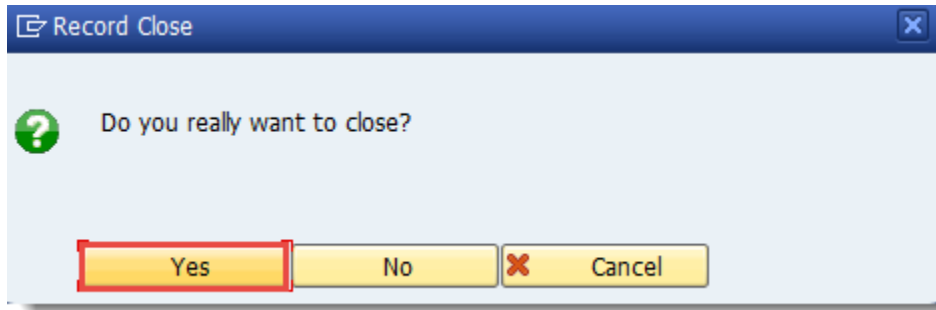
3. Click the **Record Management** icon to display the record



4. Click the Edit
5. Click the **Record** button and select the **Record Close** item



6. Click the **Yes** button to confirm closing of the record



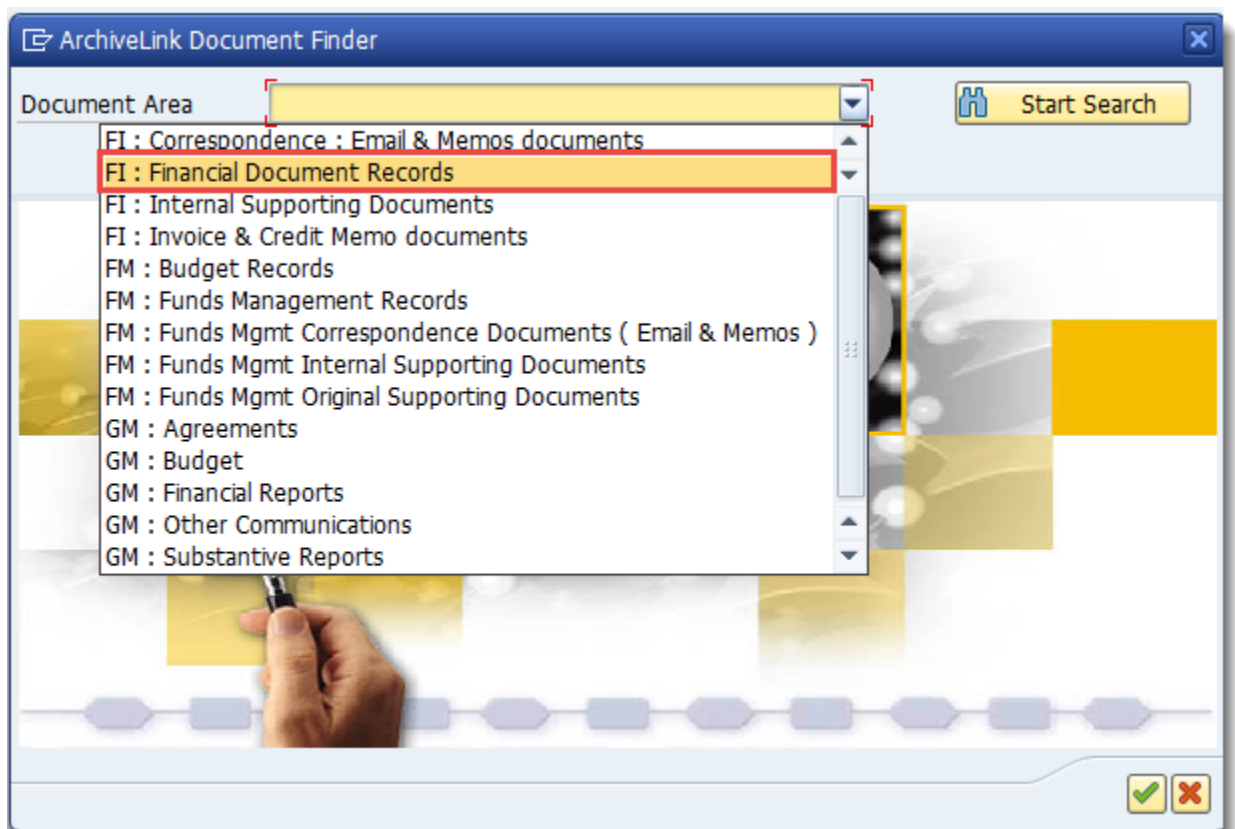
* * * * *

7. How to Search Documents with Document Finder

Records and documents can be searched and reviewed in the system using the Document Finder. The Document Finder is a search tool that enables users to search for records and files within a specific document area using the attributes assigned to the record or documents. For this reason, it is critical that users fill out attributes at the time of creating the record.

Process Steps

1. Use transaction code **OA_FIND** to open the **Document Finder**.
2. Select the required document area



3. Scroll up and down to find the most appropriate attributes to search the document, and populate the required values. For example, the following fields can be populated:
 - **Short description**
 - **Document Type**
 - **Fund**

- **Business Area**
 - **Business Partner**
4. Click the **Start Search** button
 5. All documents that meet search criteria will be displayed.
 6. Double-click the icon to display the document
 7. Alternatively click on the record to select it and click the **Enter** icon

Document Area FI : Internal Supporting Documents Start Search

Reference	<input type="text"/>		
Generation Rule for Record N	<input type="text"/>		
Status	<input type="text"/>		
Document Type	KZ		
Fund	10002		
Business Area	S100		
Business Partner	1001230005		
Document Identification	<input type="text"/>		

Hit List	Storage Date
<ul style="list-style-type: none"> ▼ 📁 FI : Financial Document Records (1 Hits) <ul style="list-style-type: none"> <li style="border: 1px solid red; padding: 2px;"> • ✉ 100031000433722016 	08.06.2016

8. Document Attachments in SRM System

In SAP Supplier Relationship Management (SAP SRM), you can manage attachments for:

- All purchasing documents, at both item and header level
Note: In the shopping cart, you can only manage attachments at item level.
- In a work item during the approval process

SAP SRM supports all formats that can be uploaded from a file directory.

8.1 Attach Documents in Shopping Cart

Process Steps

1. Create the Shopping Cart and click the **Details** button

Create Shopping Cart

Number 1000033631 Document Name 001T5REQ 08.06.2016 18:53 Stat

Order Close Print Preview Save Check Park System Information

▼ General Data

Buy on Behalf of: 001T5REQ 001T5REQ

Name of shopping cart: Belt Set Order

Default Settings: [Set Values](#)

Header Data: [Values](#)

Team Shopping Cart: Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

Budget: [Display](#)

Document Changes: [Display](#)

▼ Item Overview

Details Add Item Copy Paste Duplicate Delete

Line Number	Item Type	Product ID	Description	Product Category
1	Material	1200000003	Belt Set	26111800

2. Go to the **Note and Attachment** tab
3. Click the **Add Attachment** button and browse for the document to be attached

The screenshot shows the 'Details for item 1 Belt Set' interface. The 'Notes and Attachments' tab is selected and highlighted with a red box. Below the tab, there is a 'Notes' section with a 'Clear' button and a table with columns 'Category' and 'Description'. The table contains two rows: 'Supplier Text' with description '-Empty-' and 'Internal Note' with description '-Empty-'. Below the 'Notes' section is an 'Attachments' section with buttons for 'Add Attachment', 'Edit Description', 'Versioning', 'Delete', and 'Create Profile'. The 'Add Attachment' button is highlighted in red. Below the buttons is a table with columns 'Category', 'Description', 'File Name', 'Version', 'Processor', and 'Visible Indicator'. The table is empty, and a message below it says 'The table does not contain any data'.

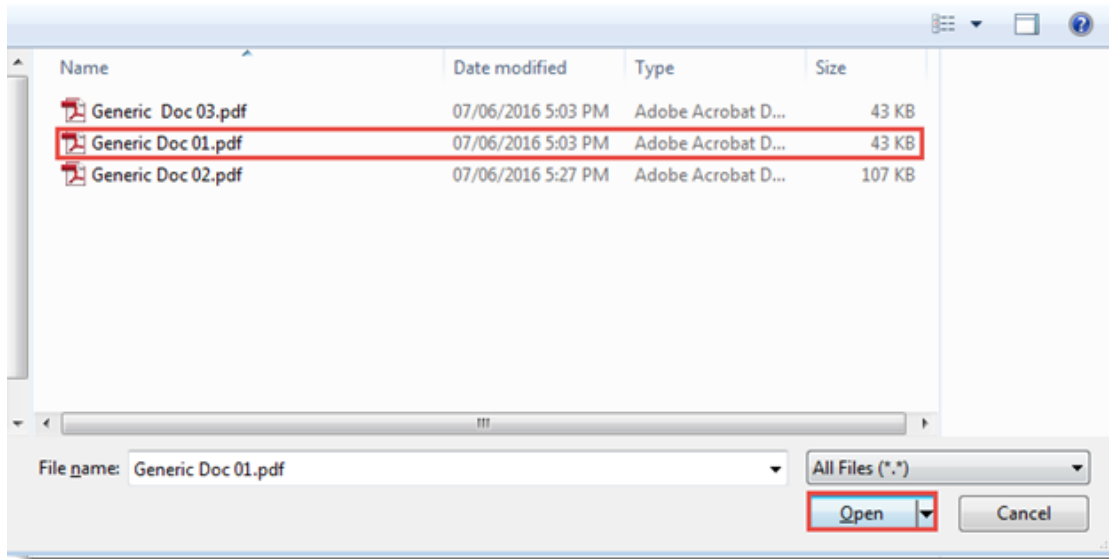
Note: Visible Indicator check box is used for restricting the document to Internal only.

4. Click the **Browse** button to select the file from the system
- 5.

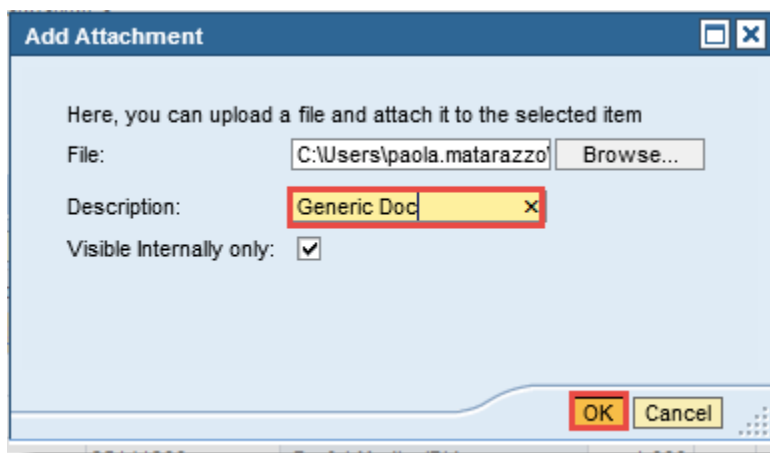
The screenshot shows the 'Add Attachment' dialog box. It contains the following fields and controls:

- Text: "Here, you can upload a file and attach it to the selected item"
- File: A text input field followed by a "Browse..." button, which is highlighted in red.
- Description: A text input field.
- Visible Internally only: A checkbox that is checked.
- Buttons: "OK" and "Cancel" buttons at the bottom right.

6. Select the file,
7. click the **Open** button



8. Type the required description in the **Description** field
9. Click the **OK** button



10. Click the hyperlink document in the **Description** field to display the attachment

Category	Description	File Name	Version	Processor	Visible Internally only
Standard Attachment	Generic Doc 01	Generic Doc 01.pdf	1		<input checked="" type="checkbox"/>

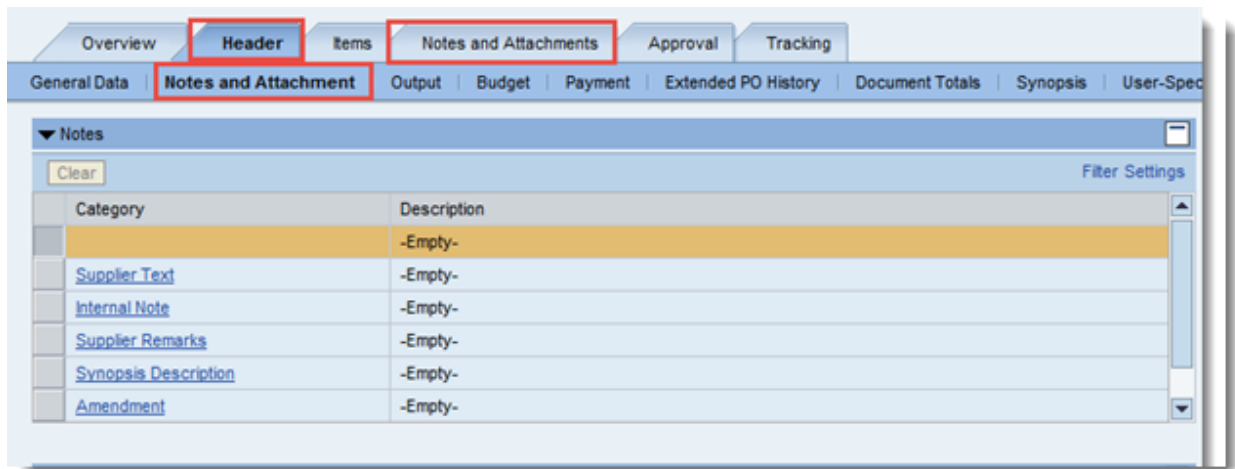
11. Click the **Open** button and review the attachment

Do you want to open or save **Generic Doc 01.pdf** (42.3 KB) from **unsapt1r.umoja.un.org**?

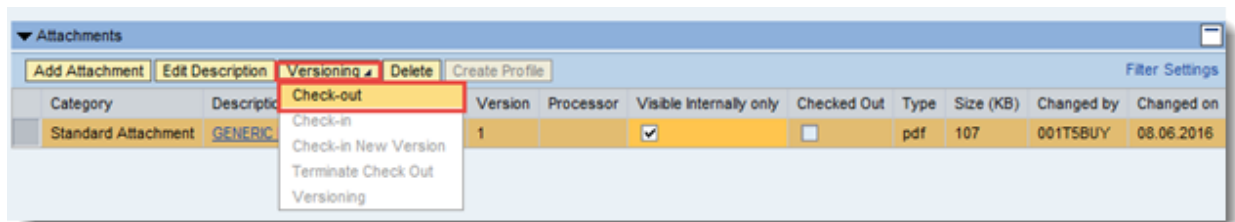
8.2 Modify Attached Documents after It Is Attached in Purchasing Documents

Process Steps

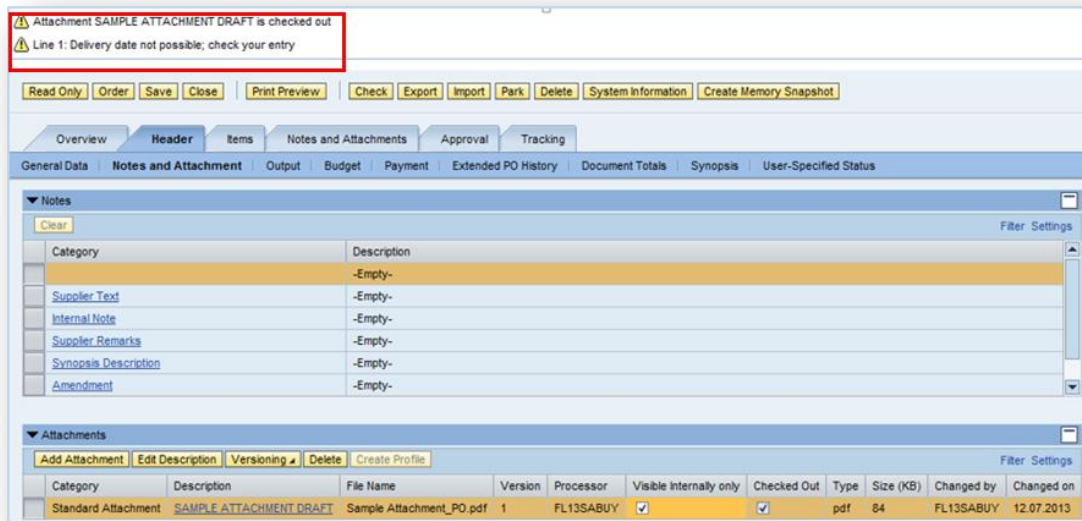
1. Navigate to the **Header** tab and click the **Notes and Attachment** tab
2. Alternatively click directly the **Noted and Attachment** tab



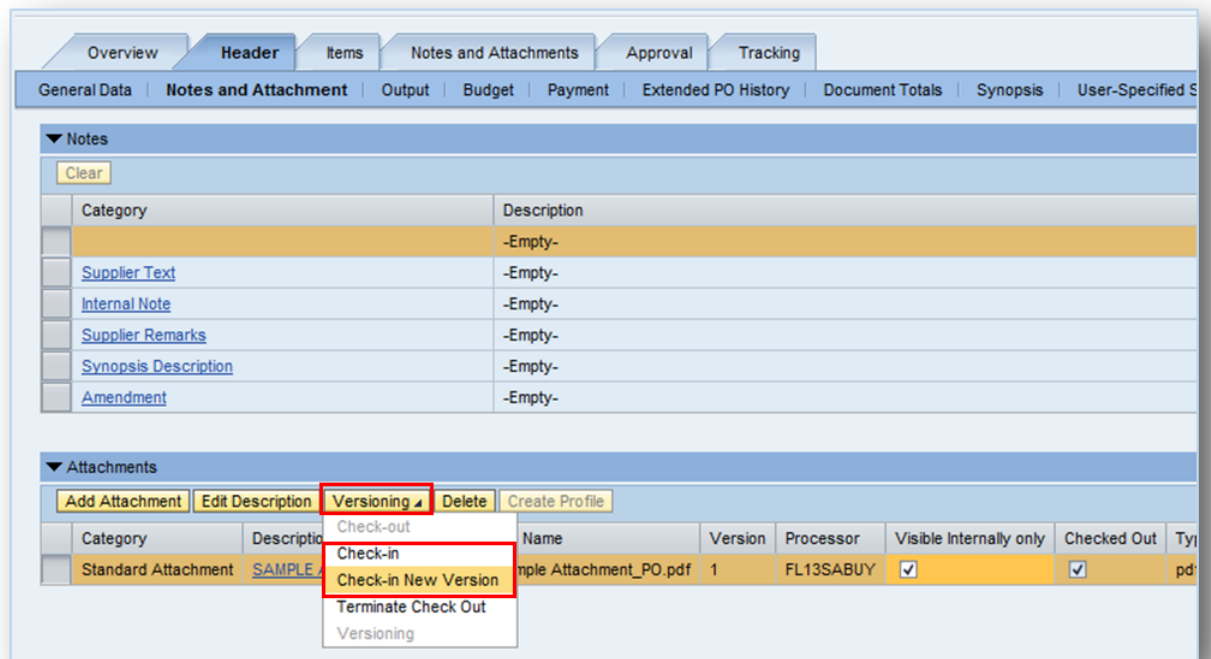
3. Click the **Versioning** button and select the **Check-out** item to modify the existing attachment



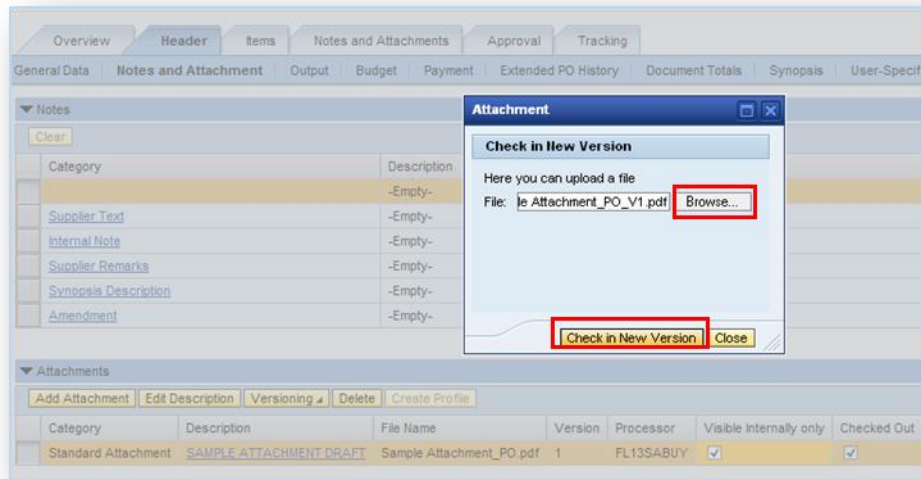
4. A message appears at the top of the screen indicating that the attachment has been check out



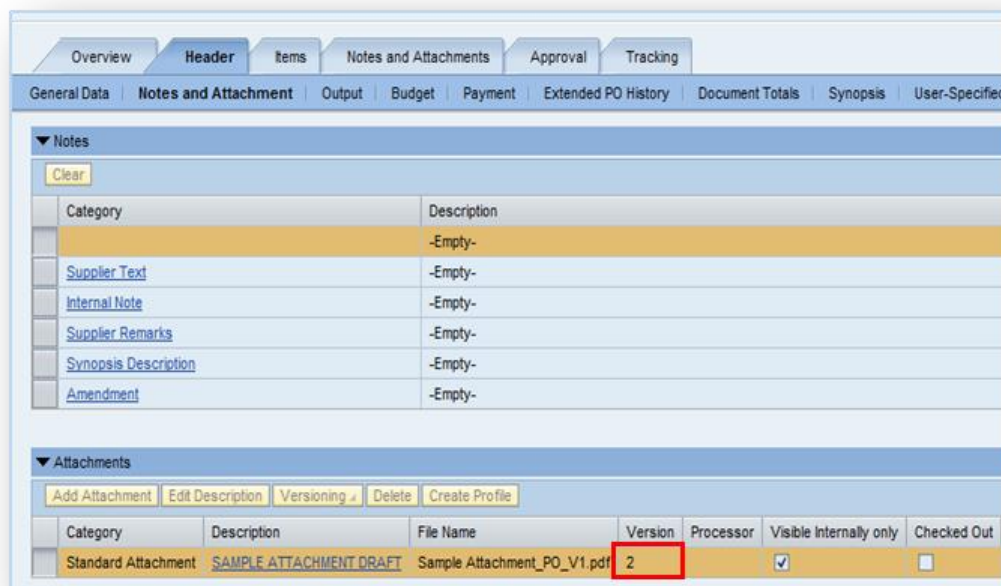
5. Click the **Versioning** button to upload the document in its current version
6. Select the **Check-in** item.
7. Select the **Check-in New Version** item to upload a new version of the document,



8. Click the **Browse** button to select the file from the system
9. Click the **Check in New Version** button



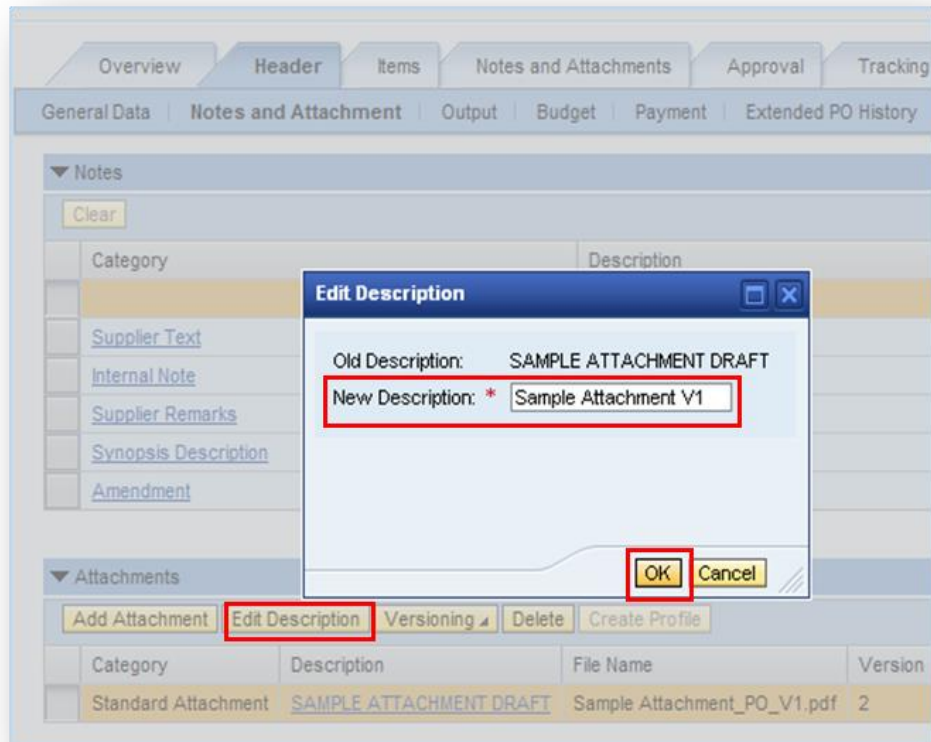
10. If a new version of the document is uploaded, the version number will be changed



11. Click the **Edit Description** button to modify the description of the document

12. Type the new description in the **New Description** field

13. Click the **OK** button



8.3 Upload Documents via Collaboration with cFolders

Process Steps

1. Click the **Create** button to create the collaboration link to cFolders
2. Click the **Collaboration** link created to launch cFolders launchpad

RFx Number 3200000018 Smart Number FL19SABUY 05.06.2013 09:40:15 Type RFQ-Standard
 Number of Items 1 Version Number Version Type Active Version External Version 1

Close Read Only Publish Save Check Export Print Preview Delete Import System Information

RFx Information Bidders Items **Notes and Attachments** Conditions Weights and :

Notes

Add Clear

Assigned To	Category
Item01"PROVISION OF GENERATOR RELATED"	Internal Note

Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile

Assigned To	Category	Description	File Name	Version	Process
The table does not contain any data					

Collaboration

Create Assign Delete

Collaboration Create a new collaboration folder

The table does not contain any data

RFx Information Bidders Items **Notes and Attachments** Conditions

Notes

Add Clear

Assigned To	Category
Item01"PROVISION OF GENERATOR RELATED"	Internal Note

Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile

Assigned To	Category	Description	File Name	Version
The table does not contain any data				

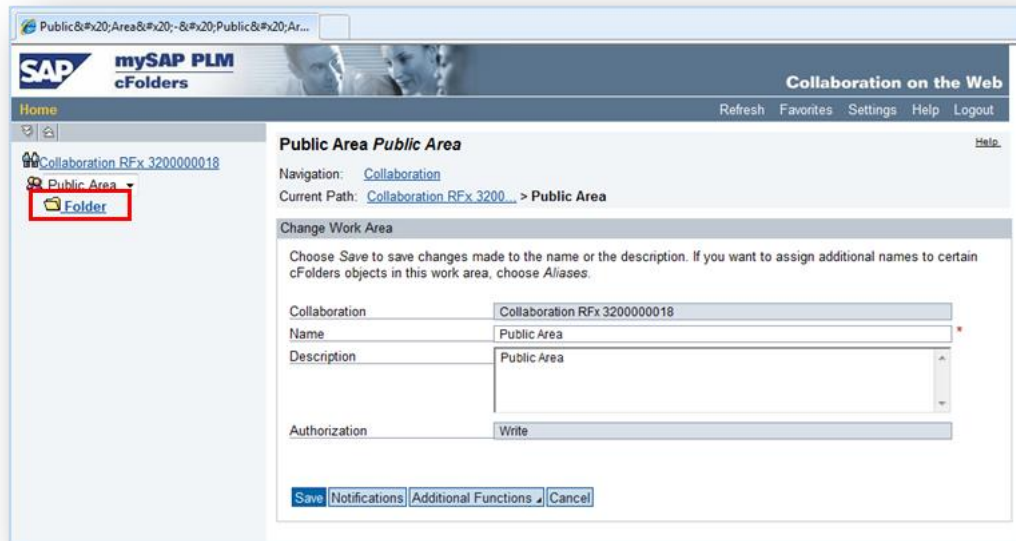
Collaboration

Create Assign Delete

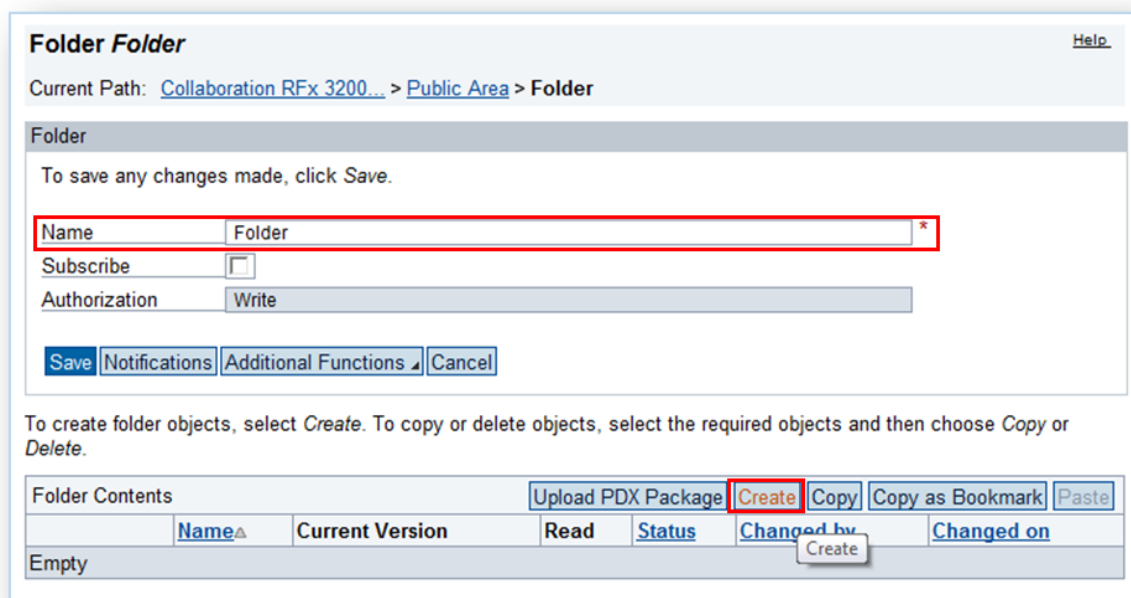
Collaboration

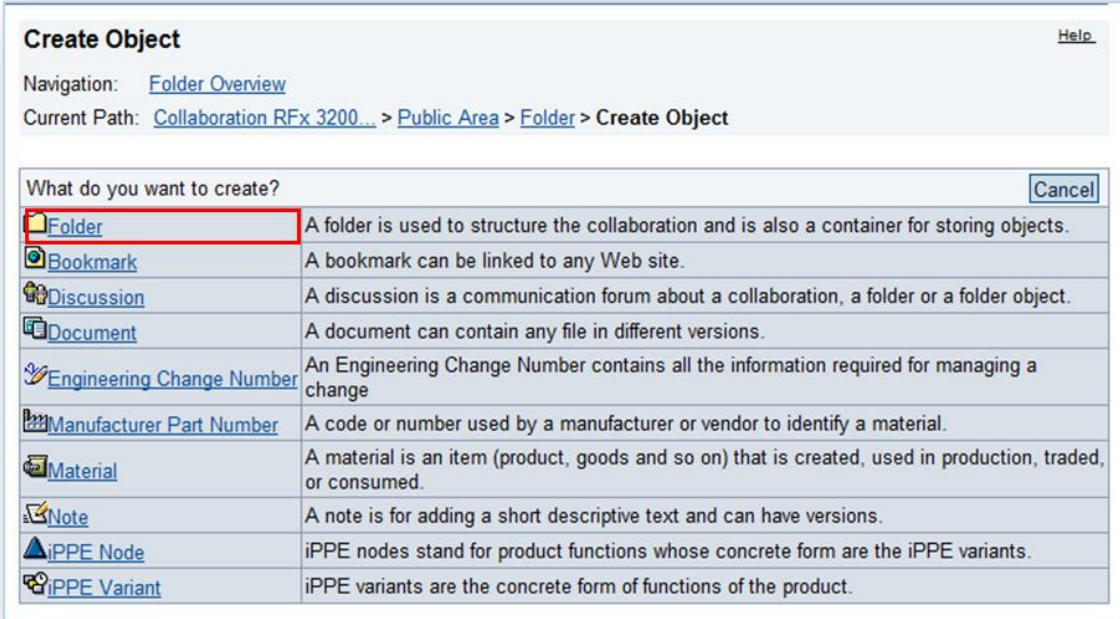
Collaboration RFx 3200000018

3. Click the **Folder** to navigate the details of the folder details and create further structure



4. Click the **Create** button
5. Click the **Folder** link to create a new folder as per the requirement
6. Populate the **Name** field
7. Click the **Save** button





Create Object [Help](#)

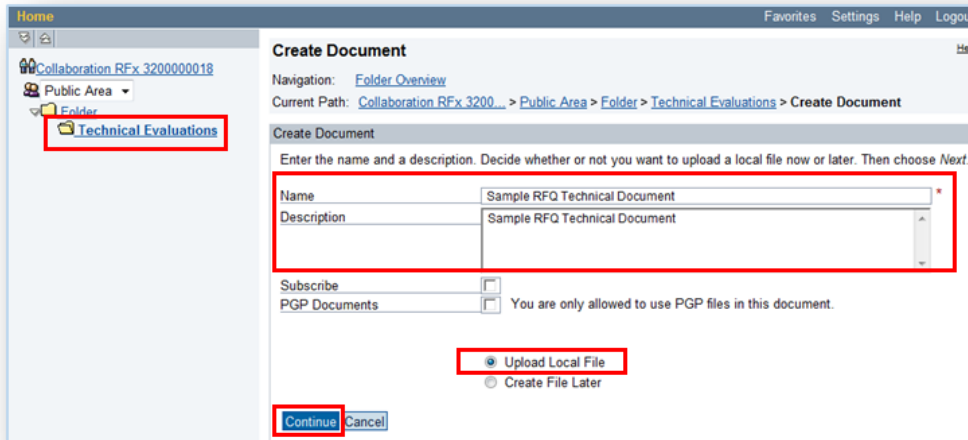
Navigation: [Folder Overview](#)

Current Path: [Collaboration RFx 3200...](#) > [Public Area](#) > [Folder](#) > **Create Object**

What do you want to create? [Cancel](#)

Folder	A folder is used to structure the collaboration and is also a container for storing objects.
Bookmark	A bookmark can be linked to any Web site.
Discussion	A discussion is a communication forum about a collaboration, a folder or a folder object.
Document	A document can contain any file in different versions.
Engineering Change Number	An Engineering Change Number contains all the information required for managing a change
Manufacturer Part Number	A code or number used by a manufacturer or vendor to identify a material.
Material	A material is an item (product, goods and so on) that is created, used in production, traded, or consumed.
Note	A note is for adding a short descriptive text and can have versions.
iPPE Node	iPPE nodes stand for product functions whose concrete form are the iPPE variants.
iPPE Variant	iPPE variants are the concrete form of functions of the product.

8. Select the folder created to upload a document inside the folder. In this case, select **Technical Evaluations** folder
9. Populate the **Name** and **Description** fields
10. Select the **Upload Local File** radio button
11. Click the **Continue** button



Home Favorites Settings Help Logout

Collaboration RFx 3200000018

Public Area

Folder

Technical Evaluations

Create Document [Help](#)

Navigation: [Folder Overview](#)

Current Path: [Collaboration RFx 3200...](#) > [Public Area](#) > [Folder](#) > [Technical Evaluations](#) > **Create Document**

Create Document

Enter the name and a description. Decide whether or not you want to upload a local file now or later. Then choose *Next*.

Name

Description

Subscribe

PGP Documents You are only allowed to use PGP files in this document.

Upload Local File

Create File Later

[Continue](#) [Cancel](#)

12. Click the **Browse** button to select the file from the system
13. Click the **Save** button

Create Version

Navigation: [Version Overview](#)

Current Path: [Collaboration RFx 3200...](#) > [Public Area](#) > [Folder](#) > [Technical Evaluations](#) > [Sample RFQ Technical D...](#) > **Create Version**

To select the required file, choose *Browse* and then *Save*.

14. Populate the **Name** field

15. Click the **Save** button

Folder Technical Evaluations [Help](#)

Current Path: [Collaboration RFx 3200...](#) > [Public Area](#) > [Folder](#) > **Technical Evaluations**

Folder

To save any changes made, click *Save*.

*

Subscribe

Authorization

To create folder objects, select *Create*. To copy or delete objects, select the required objects and then choose *Copy* or *Delete*.

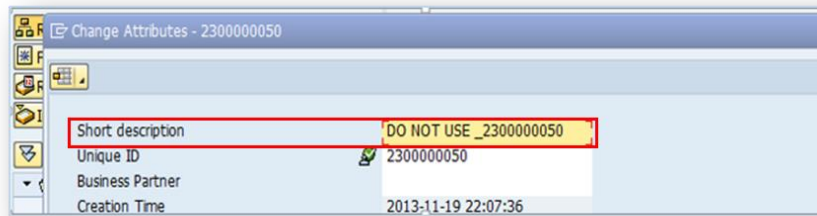
Folder Contents		<input type="button" value="Upload PDX Package"/>	<input type="button" value="Create"/>	<input type="button" value="Copy"/>	<input type="button" value="Copy as Bookmark"/>	<input type="button" value="Paste"/>	<input type="button" value="All"/>	<input type="button" value="None"/>
<input type="checkbox"/>	Name ▲	Current Version	Read	Status	Changed by	Changed on		
<input type="checkbox"/>	Sample RFQ Technical Document	Sample RFQ Technical DocumentAttachment_V1.pdf (85KB)			testuser FL13SABUY	12.07.2013 00:16:21		

9. Naming Convention and Standards

9.1 Upload Documents via Collaboration with cFolders

- Supporting documents should be uploaded in PDF Format. As such, PDF versions of word, excel and other types of document should be uploaded
- Although Excel and Word documents can be uploaded in SAP, these document are accessible and can be modified during the process before the record is closed
- Users will not be entitled to delete any documents in the system. The system will prevent users from performing this activity. In case of error while uploading incorrect documents, a new document will be uploaded only if document was “saved”. The documents will be attached in a specific node of the record model
- The document will be saved with the proper attributes :
 - Unique ID – Document / Year
 - Short Description – Document / Year
 - Fund – Applicable to FI documents
 - Business Area – Applicable to FI documents
 - Document Type – Applicable to FI documents
 - Business Partner – Applicable for FI / RE documents
 - Person Responsible – Applicable for Real Estate(RE) documents
 - Authorization Group – Applicable for Real Estate(RE) documents
- When documents are linked to Workflow, final approvers are responsible to lock records to prevent further modifications. This activity will ensure that other users are not allowed to attach or modify documents, after the approval process is completed
- Accuracy and consistency in folder and document names is crucial to be able to easily retrieve documents later
- The naming conventions are designed to be as intuitive as possible. Whether created originally in electronic or paper form, these documents all need to be named appropriately and filed in the correct electronic folders. In order to facilitate the search of document in SAP, the following naming convention must be followed:
 - Naming convention for finance documents:
 - Unique ID – Year-Doc Number-Sequential Dcmt. No.

- Short Description – Year-Doc Number-Sequential Dcmt. No.
- Naming convention for Real Estate Contract Documents:
 - Unique ID – Contract Number
 - Short Description – Contract Number
- If a document is uploaded by mistake, add the word “DO NOT USE” as part of the **Short description** field



9.2 Practices to Avoid in Naming Convention

Files uploaded to Umoja environment should follow these guidelines:

- Use the standard naming convention provided in the Umoja Job Aid for the type of documents you are uploading
- Do not use the following characters in the file names: " # % & * : < > ? \ / { | } ~ .. (two or more consecutive periods)
- **ATTENTION:** keep file names **shorter than 75 characters**
- Files have an extension before being uploaded into the system
- Avoid starting a file name with a period (.)
- Avoid using two consecutive periods (..) in a file name

9.3 File Name Extensions

There are certain file types that are rejected because they can be harmful to the system. The list of file extensions that are likely to be forbidden by the environment are as follow:

File Extensions Forbidden							
.ade	.chm	.hlp	.ksh	.mav	.msh1xml	.prg	.shtml
.adp	.class	.hta	.lnk	.maw	.msh2	.printer	.soap
.app	.cmd	.htr	.mad	.mda	.msh2xml	.pst	.stm
.asa	.com	.htw	.maf	.mdb	.mshxml	.reg	.url
.ashx	.config	.ida	.mag	.mde	.msi	.rem	.vb
.asmx	.cpl	.idc	.mam	.mdt	.msp	.scf	.vbe
.asp	.crt	.idq	.maq	.mdw	.mst	.scr	.vbs
.bas	.csh	.ins	.mar	.mdz	.ops	.sct	.ws
.bat	.dll	.isp	.mas	.msc	.pcd	.shb	.wsc
.cdx	.exe	.its	.mat	.msh	.pif	.shs	.wsf
.cer	.fxp	.jse	.mau	.msh1	.prf	.shtm	.wsh

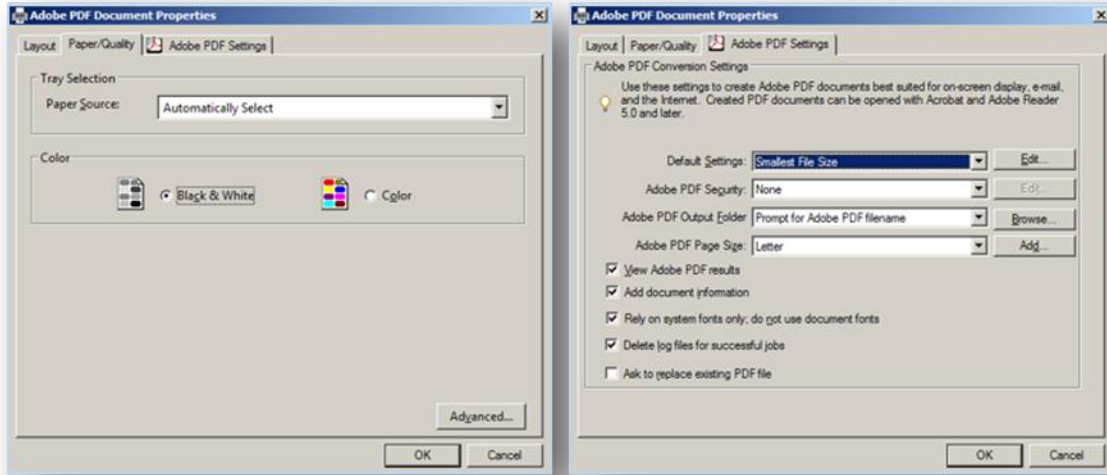
9.4 File Size Recommendation

In attaching documents into Umoja, please be mindful that due to bandwidth limitations in some missions, large files could affect performance. We recommended the following best practices:

- Limit the size of attached files to the minimum possible, so please consider resizing image files before uploaded them
- Use black and white settings for scanned pdfs files
- Consider resizing or reducing the number of embedded pictures in documents
- Use newer file formats for office documents, like docx or xlsx

When scanning or converting documents like receipts or forms a resolution of 200dpi and Black and White settings are enough for a correct scanning.

Note: For the current UMOJA/SharePoint integrated environment, we recommend **10 MB** as a maximum file size. If the file to be attached exceeds that limit, please try to convert it to pdf, using the “Smallest file size” setting if it is available and Black & White as color, or with settings of 200dpi and Black & White if the setting is not available (when scanning, for example).



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