



## Attach a File (Word, Excel) via Change Parked Document

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Files created in other software, such as Word or Excel, may be attached to the journal entry **BEFORE** the document is completed, in other words to a parked, not-completed document. The files can be attached via the transaction titled “Change Parked Document” on the User Menu. This transaction also allows for other types of changes which are covered in the previous section of this Guide. In addition, changes can be made to a rejected document and are covered in that section of the Guide as well.

**To attach a file, the  Park Document button must be used when initiating the document to put the document on hold and reserve a document number in the SAP R/3 system.** The menu path: Document → Complete should not be used yet. Then the parked document can be changed (the attached file added) via the Change Park Document transaction.

The Change Parked Document transaction contains the  **Services for Objects** button, which can be used to attach the file per the steps outlined in this section of the Guide. Once the file is attached, the document can be completed (i.e., routed to approvers in the JV Workflow process) right from the Change Parked Document transaction as well.

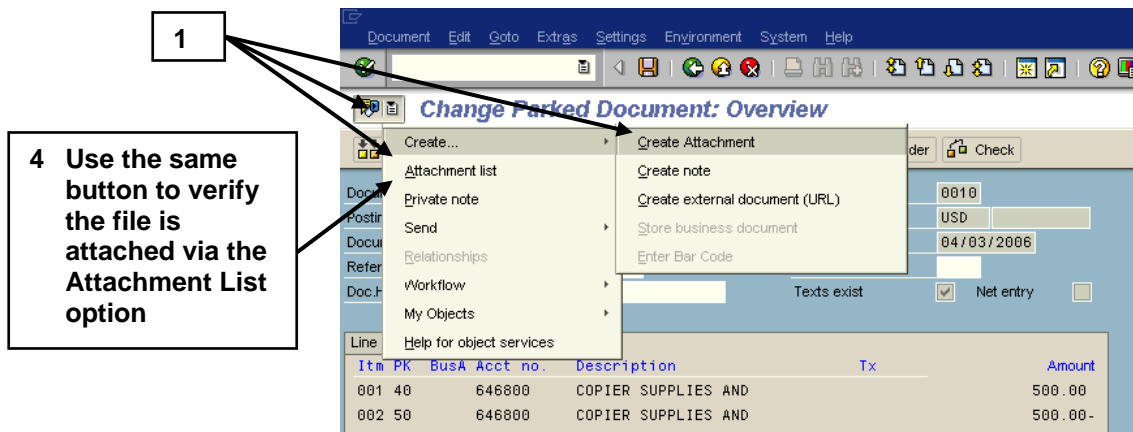
## Attach a File (Word, Excel, etc.) via Change Parked Document – FBV2

Via User Menu: Financials → Financial Documents → Change Parked Document


*Note:* When the document is initiated or created, use the  **Park Document** button to **place the document on hold and reserve a document number in the SAP R/3 system (i.e., DO NOT use the menu path Document → Complete and start the approval process).**

**Access the parked document via the menu path: Financials → Financial Documents → Change Parked Document or the Transaction Code FBV2.**

**On the Change Parked Document: Overview screen:**



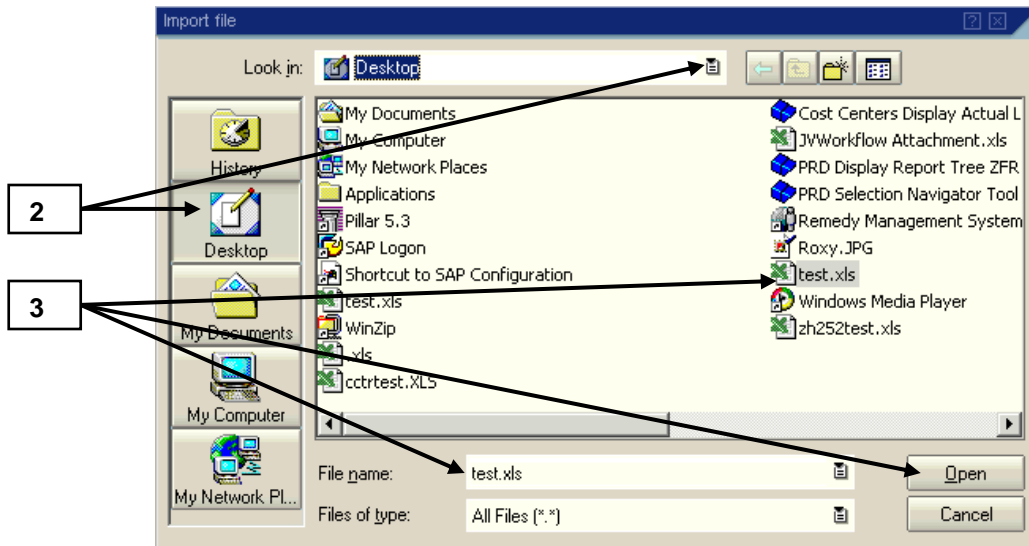
1. To attach a file:

- Click on the **drop-down portion** of the  **Services for Objects** button located in the Title Bar of the screen.
- In the resulting drop-down list, click on the path: **Create** → **Create Attachment**.

## Attach a File via Change Parked Document (cont.)


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On the resulting *Import File* pop-up window:



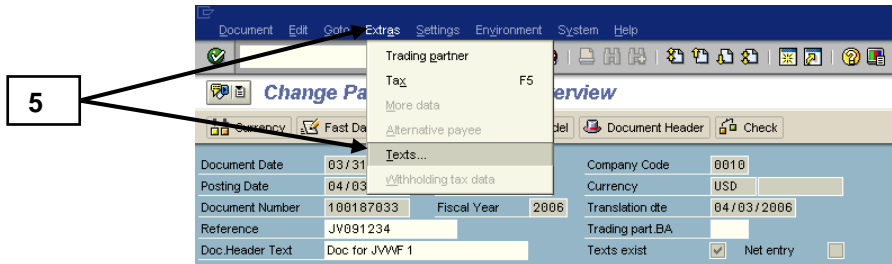
2. Browse the various network drives to locate the file to be attached (use **Drop-down** button in **Look in:** field if needed).
3. Once located, **click once on the file name** to populate the File Name field and click on the **Open** button to create the attachment.

*Note:* **Multiple files or notes may be attached to a single parked document. There is no visual indicator that the file was attached.**

4. To verify the file was attached if desired:
  - Click on the **drop-down portion** of the  **Services for Objects** button located in the Title Bar of the screen.
  - In the resulting drop-down list, click on **Attachment List**.
  - In the *Service: Attachment List* window, the attachment will be listed and can be opened by double-clicking on the attachment if needed.

# Attach a File via Change Parked Document (cont.)

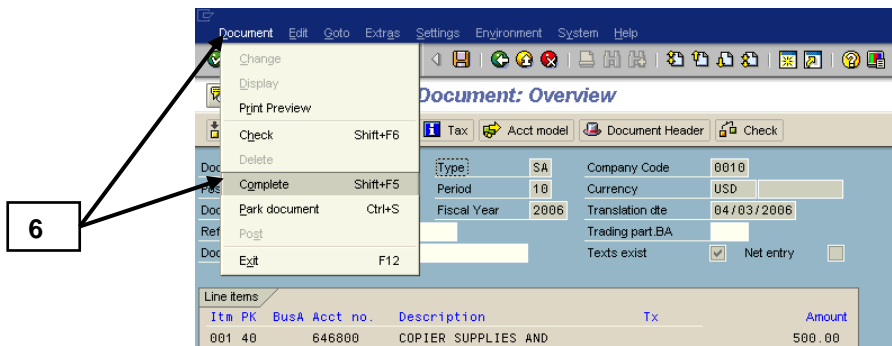
On the *Change Parked Document: Overview* screen:




5. While still in the *Change Parked Document* screen, via the menu path **Extra** → **Texts** to let approvers and other Duke customers know that an attachment exists (use **Note** field and double click on the word Note for more text if needed).

*Note:* Since there are **no visual cues to an approver that there is a note or file attached**, it is **highly recommended that the initiator use the text fields on a parked document to indicate that attachments exist**.

On the *Change Parked Document: Overview* screen:



6. While still in the *Change Parked Document* screen once the document is complete and ready to be approved / posted, **initiate the routing process** (known as workflow) via the menu path: **Document** → **Complete**.
7. Click on the  **Exit** button (**Shift+F3**) until the initial R/3 screen is displayed.