

How To Guide

PUBLIC

SAP Business One and SAP Business One, version for SAP HANA

Document Version: 1.0 – 2015-01-07

How to Manage Attachments in SAP Business One

SAP Business One 9.1 PL05 and SAP Business One 9.1 PL05, version for SAP HANA



Typographic Conventions

Type Style	Description
<i>Example</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE	Keys on the keyboard, for example, F2 or ENTER.

Document History

Version	Date	Change
1.0	2015-1-30	New

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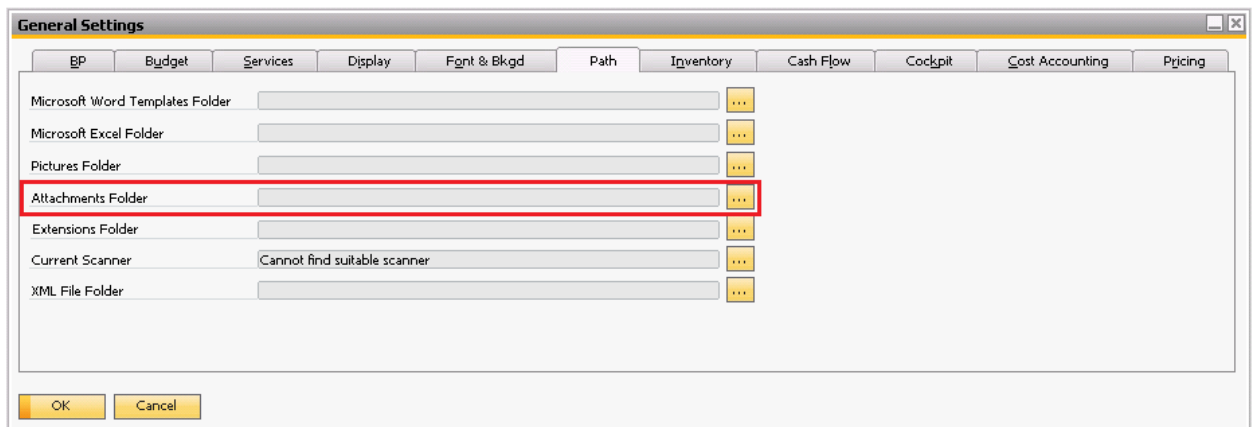
Introduction

Note

This document applies to SAP Business One 9.1 and SAP Business One 9.1, version for SAP HANA. All occurrences of “SAP Business One” in this document refer to both versions of the application.

If you want to add attachments to SAP Business One documents, you must define an attachment folder path in company level for all users under:

[Administration](#) → [System Initialization](#) → [General Settings](#) → [Path](#) tab:



All attachments added to the various SAP Business One documents are stored in this folder, and the path is displayed accordingly in all relevant documents.

As of SAP Business One 9.1 PL05, the attachments management functionality supports the following activities:

- Updating attachment folder path retroactively in SAP Business One documents
- Setting default attachment folder per user
- Uploading attachments to subfolders

Glossary

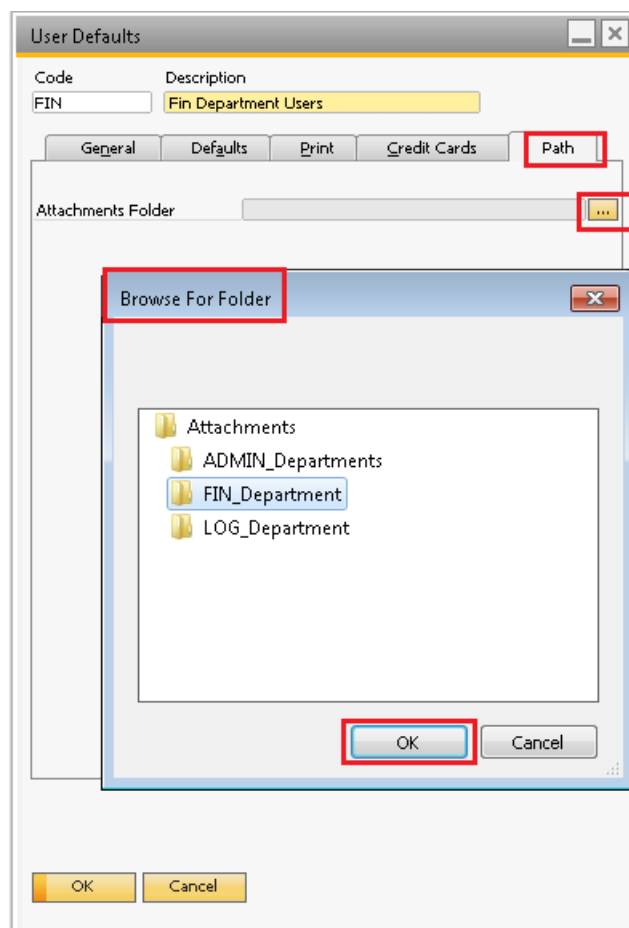
Term	Description
documents	<p>In this guide, "documents" refers to all entities in SAP Business One to which attachments can be added, such as:</p> <p>Sales and purchasing documents, sales opportunities, alerts, activities, blanket agreements, business partner master data, item master data, campaign master data, inventory and production documents, service calls and contracts, contract templates, customer equipment cards, customer equipment card histories, employee master data, fixed assets master data, user defined fields of type General where Structure is set to Link.</p>

Managing Attachments

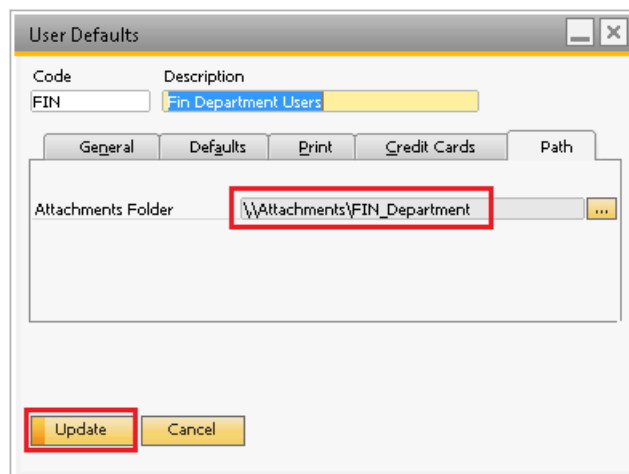
Assigning Default Attachment Folders per User

You can assign a default attachment folder for each user as part of the *User Defaults*.

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *User Defaults* → *Path* tab.
2. In the *Attachments Folder* field, choose the ... (*Browse*) button. The *Browse For Folder* window appears.
3. Select the required folder and choose *OK*.



The path to the selected folder is copied to the *Attachments Folder* field.



4. Choose *Update*.

Updating Target Paths in Documents

Previously, if you updated the attachment folder path, the new path used to be applied onwards only, and existing documents continued displaying the old attachments path folder.

The new enhancement allows you to update the attachment folder path also in existing documents.

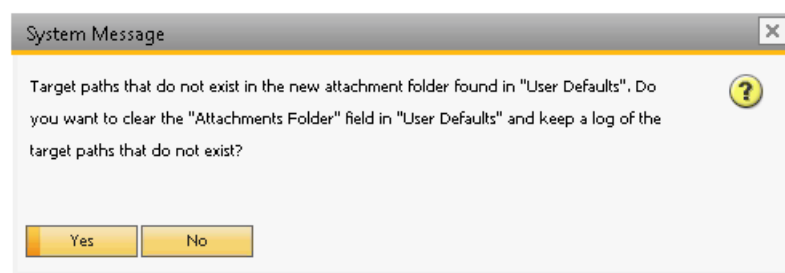
Note

The target path is updated in the documents; however the attachment files are not moved to the new location. Make sure to transfer the attachment files to the new attachment folder and to create all respective subfolders, if needed.

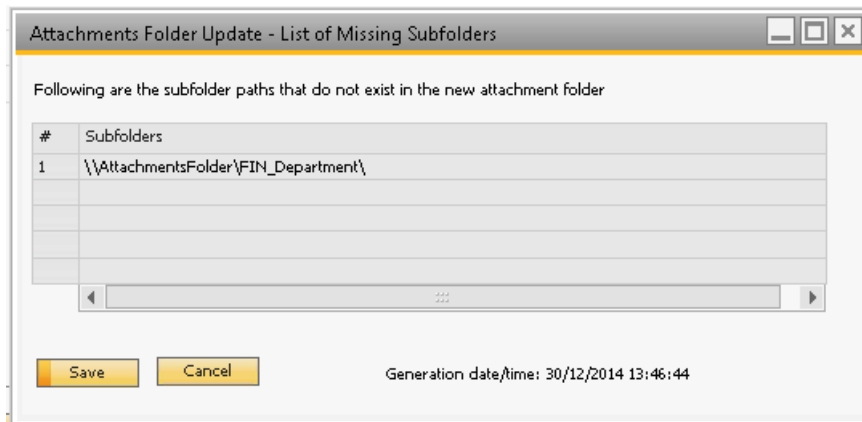
1. From the SAP Business One *Main Menu*, choose *Administration* → *System Initialization* → *General Settings* → *Path* tab.
2. In the *Attachments Folder* field, choose the ... (*Browse*) button, and select the required attachment folder path.
3. Choose *Update*.

Note

SAP Business One checks whether subfolders defined in *User Defaults* exist in the newly defined attachment folder path. If not, the following warning appears:

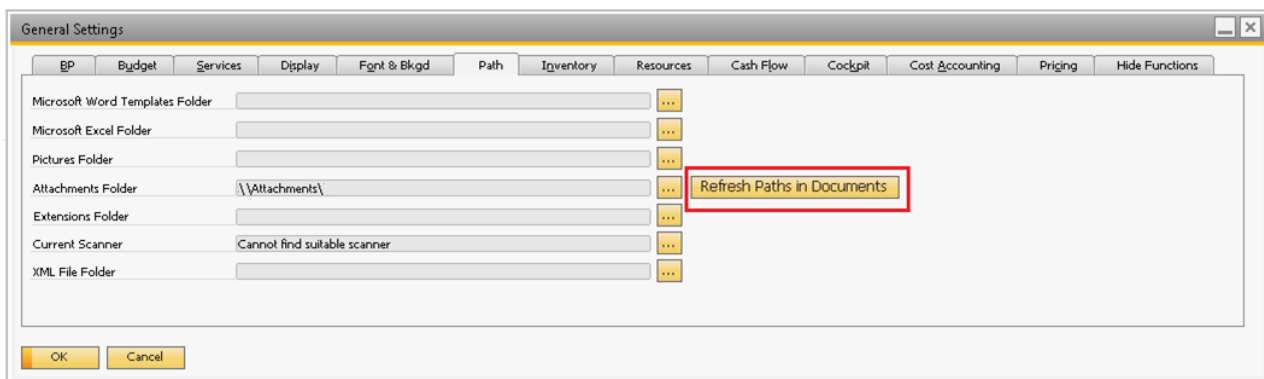


If you choose [Yes](#), the attachment folder path in [User Defaults](#) is cleared and the following window appears, listing the subfolders used in [User Defaults](#) and which do not exist in the new attachment folder:



To save the list as a *.txt file, choose [Save](#).

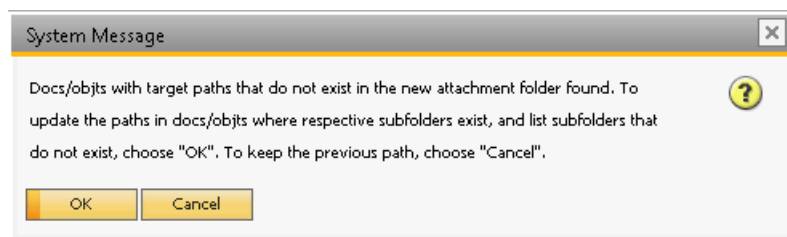
- Choose the [Refresh Paths in Documents](#) button.



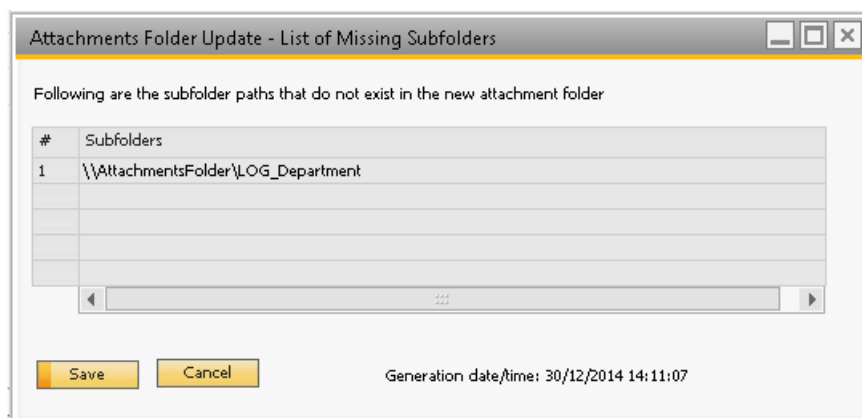
A system message notifying you that the target path of attachments in existing documents will be overwritten. To continue, choose [Yes](#). To keep the old attachment folder path in existing documents, choose [No](#).

i Note

If you choose [Yes](#), SAP Business One checks whether subfolders that do not exist in the new attachment folder path are used in existing documents. If so, the following warning message appears:



If you choose [OK](#), the following window appears, listing the subfolders that do not exist in the new attachment folder:

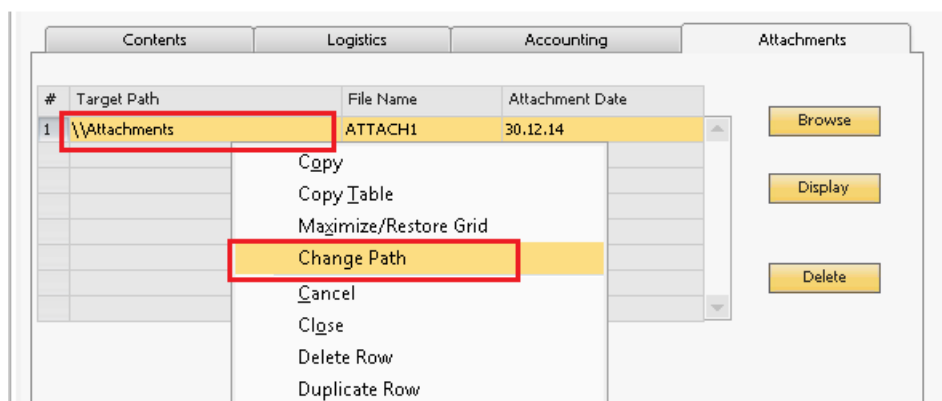


To save the list as a *.txt file choose [Save](#).

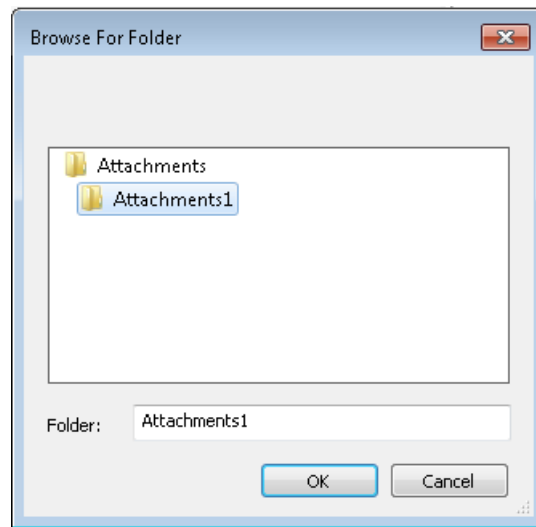
Changing Target Paths for Newly Added Attachments

When uploading an attachment to a document or object, the target path is set by default, either according to the path defined in [Administration → System Initialization → General Settings → Path](#) tab, or according to the path defined in [Administration → Setup → General → User Defaults → Path](#) tab. If needed, you can change the target path at the time of uploading new attachments.

1. Upload the required attachment to the relevant document. The default attachment folder appears in the [Target Path](#) column.
2. Place the mouse on the [Target Path](#) column, and from the context menu, choose the [Change Path](#) option.



3. The [Browse For Folder](#) window appears, displaying the target path folder and any available subfolders. You can create new subfolders in this window, if needed (subject to respective authorizations):



Select the required subfolder and choose *OK*.

The *Target Path* in the document is updated accordingly and the attachment is stored in the newly defined folder.

				Contents	Logistics	Accounting	Attachments
#	Target Path	File Name	Attachment Date				
1	\\Attachments\Attachments1	ATTACH1	30.12.14				

Browse
Display
Delete

- Choose *Update*.



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