

Attaching Documents in Unit4

Documents can be attached in many windows in Unit4 (see

- Expense claims
- Requisitions
- Forms
 - New Supplier Request
 - Project Request Form
 - Internal Research Application
- Prepare your supporting documents before starting a process
 - ✓ **PDF is the best format for documents.**
 - ✗ **Photo images cannot be uploaded to U4.**

To Attach a Document

- Select the **paperclip** top right of screen
 - Select **Add a document**
 - Select **Upload**
 - Find the relevant documents(s)
 - **Double click** or select **Open** to attach the file, and select **Save**
 - Do this for each document to be attached
- When complete close the 'Add a document' screen.

Document Size Limitation

Larger documents may fail to upload, and will need to be reduced in size as below

- Microsoft **WORD** Document (.docx)
 - Open the document > Save as PDF
 - Ensure '**Optimize for: Minimum size (publishing online)**' (see below)

File name: LHU - Supplier Application Form steri.pdf

Save as type: PDF (*.pdf)

Authors: Karen Dalby Tags: Add a tag Title: Add a title

Optimize for: ☐ Standard (publishing online and printing) Options...

☒ Minimum size (publishing online) ☒ Open file after publishing

Save Cancel

*If the document load fails again follow the 'Adobe **ACROBAT** Document (.pdf)' instructions below*

- Adobe **ACROBAT** Document (.pdf)
 - Open the PDF > select *File > Save as Other > Reduced Size PDF...*
 - Click OK and Save (to overwrite the current file)

Restricted permissions on electronically signed documents

Electronically signed documents may have restrictions on amendments

- Save the file as a **WORD** document
- Open the **WORD** document and re-save it as a **PDF**
 - Follow the 'Adobe Acrobat Document (.pdf)' instructions above

Detailed process information

EXPENSE CLAIMS

Preparing Receipts

- Receipts should be scanned on a printer, and sent to your email as a PDF *(if necessary check this with the relevant admin team).*
- **Alternatively**
 - Take photos using a mobile phone
 - Screenshot the images to a word document
 - *Amend the images to fit approx. 4 per page*
 - Save the word document as a PDF file
 - File > Save As
 - Select the appropriate folder
 - Save as Type > Select PDF from the drop-down list
 - Save

Adding Receipts to an existing claim

- In Unit4 open the Expenses entry screen
- Select 'Open' at the bottom of the window
- Enter the requisition number
- Search & select the line to open the expense
- Attach documents as above

REQUISITIONS

- Support documents may be required for purchases that exceed the [Procurement thresholds](#)
- Invoices should not be attached to requisitions, the purchase ledger team will not see these
 - All invoices should be sent electronically to purchaseledger@hope.ac.uk

FORMS

To access a Form already created in U4

- Select [Forms > 'Appropriate Form menu item'](#).
- When the form opens over-type **[NEW]** with the relevant **Form ID**
 - *This is the Form ID created when you save the form*
- **Tab out** to open the saved form.

FormID not known

- Select [Forms > 'Appropriate Form menu item'](#).
- When the form opens click on the **down arrow** next to the **FormID** field
- Select **Value Lookup**
 - If the form was saved as **Draft** Enter 'D' in the **Status** (*column filter*)
 - **Submitted forms have status 'N'**
 - Select **Search**
 - Use the right **arrow** (*at the bottom of the pop-up screen*) to go to the **last page**
 - Select the last form, and check whether it is the correct one.
 - *Repeat above to find the correct form*

TIP: Enter part of a **form ID** with wildcards, in the **Attribute value** column, to filter the results e.g. *XXXX*.