

How to Add an Attachment to Budget Transfers

Once a budget transfer has been entered, an attachment can be added

Navigation: Main Menu → Financials → Commitment Control → Budget Journals → Enter Budget Transfer

The screenshot shows the 'Budget Header' tab with the following fields:

- Unit: UFLOR
- Journal ID: 0002925944
- Date: 12/15/2017
- *Ledger Group: CASH_BASED
- Fiscal Year: 2018
- Period: 6
- Control ChartField: Fund Code
- *Currency: USD
- Rate Type: CRRNT
- Budget Header Status: None
- *Budget Entry Type: Original
- Exchange Rate: 1.00000000
- Cur Effdt: 12/15/2017
- Budget Type: Expense

Parent Budget Options:

- Generate Parent Budget(s)
- Use Default Entry Event
- Parent Budget Entry Type: [Dropdown]

Attachments (0)

- Once you are in the budget transfer (Budget Header tab), click on [Attachments \(0\)](#)
- Click on “Add Attachment”

The screenshot shows the 'Budget Journal Attachments' screen with the following details:

- Unit: UFLOR
- Journal ID: 0002925944
- Date: 12/15/2017

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
View	<input checked="" type="checkbox"/>				

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Add Attachment

OK Cancel Refresh

- Click “Browse” and find the file. Once found, click “Open”
- Click “Upload”
- At this point, you can add a Description. This field is limited to 100 characters
- Once all of the desired files have been added, please click “OK” at the bottom of the screen

- Once you have clicked "OK" you are taken back to the Budget Header tab, and you see that you have an Attachment submitted. [Attachments \(1\)](#) **You are NOT done**, you must hit "**SAVE**". If you do not, then the attachment will not have been successfully attached

NOTE:

- When an attachment has been added, the date, time, name and the UFID of the individual who has added the attachment will appear on the Attachment page

Budget Journal Attachments						
Unit UFLOR		Journal ID 0002925944		Date 12/15/2017		
Details						
File Name	Show to Approver?	Description	User	Name	Date/Time Stamp	
0002925944.pdf	<input checked="" type="checkbox"/>		12345678	Albert Gator	12/15/2017 8:15:05AM	

How to Delete an Attachment

- Deleting has practically the same steps, but remember you **CAN** delete an attachment that is attached to a **POSTED** journal

- Once you are in the budget transfer (Budget Header tab), click on [Attachments \(1\)](#)

The screenshot shows the 'Budget Header' tab with various fields. A red box highlights the 'Attachments (1)' link in the bottom right corner.

Unit	UFLOR	Journal ID	0002925944	Date	12/15/2017
Ledger Group	CASH_BASED	Fiscal Year	2018	Period	6
Control ChartField	Fund Code	Currency	USD		
Budget Header Status	Posted	Rate Type	CRRNT		
Budget Entry Type	Original	Exchange Rate	1.00000000		
Parent Budget Options		Cur Effdt	12/15/2017		
<input type="checkbox"/> Generate Parent Budget(s)		Budget Type	Expense		
<input type="checkbox"/> Use Default Entry Event					
Parent Budget Entry Type					

- Click the minus sign next to the attachment you want to delete

The screenshot shows the 'Budget Journal Attachments' table with one row. A red box highlights the minus sign icon in the bottom right corner of the row.

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
0002925944.pdf	<input checked="" type="checkbox"/>		12345678	Albert Gator	12/15/2017 8:15:05AM

- Confirm that you want to delete the attachment and click "OK"
- Click the "OK" at the bottom of the page, to leave the Attachments page
- **You are NOT done**, you must hit "**SAVE**". If you do not, then the attachment will not have been successfully deleted