Adding a Journal Entry Attachment

Depending upon the nature of a Journal Entry (JE), it may be required to attach needed documentation to it prior to submitting for posting to the General Ledger (GL). Follow the steps below to add an attachment to a journal.

Navigate to **Main Menu > Financials > General Ledger > Journals > Journal Entry > Create/Update Journal Entries**

JOURNAL ENTRY HEADER TAB

1. On the Header tab, click the **Documents** button. This will open a new tab in OnBase where you can attach supporting documentation for the journal. The number of attachments will be indicated in the **Documents** button in brackets once the document(s) is saved.

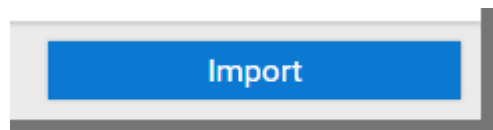ATTACH FILE IN ONBASE

2. Click the **Upload File** button (up arrow) in the top left corner of the OnBase screen.
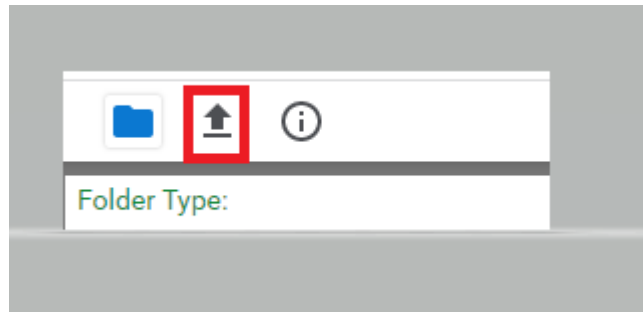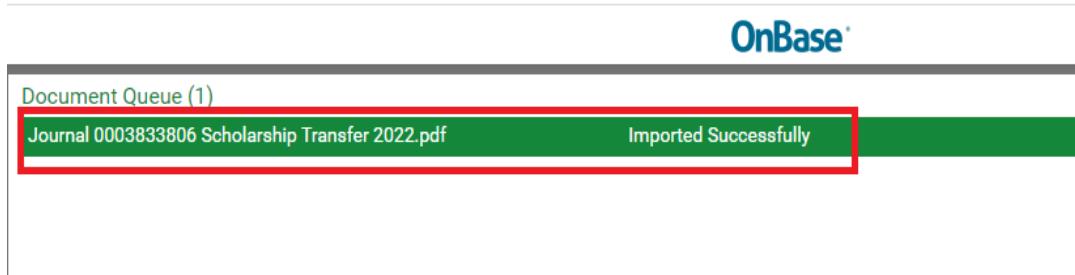

3. Select a file to attach using the **Choose File** button in the top left corner of the screen.
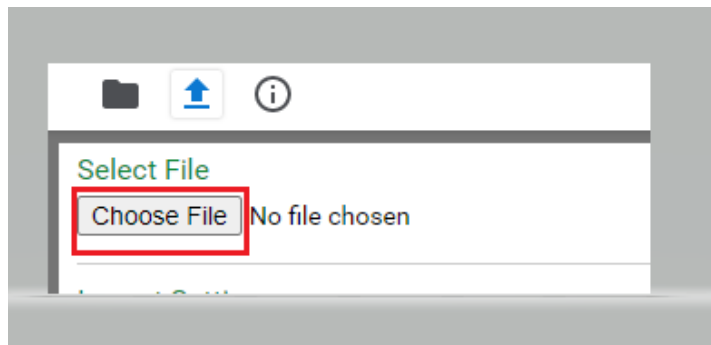
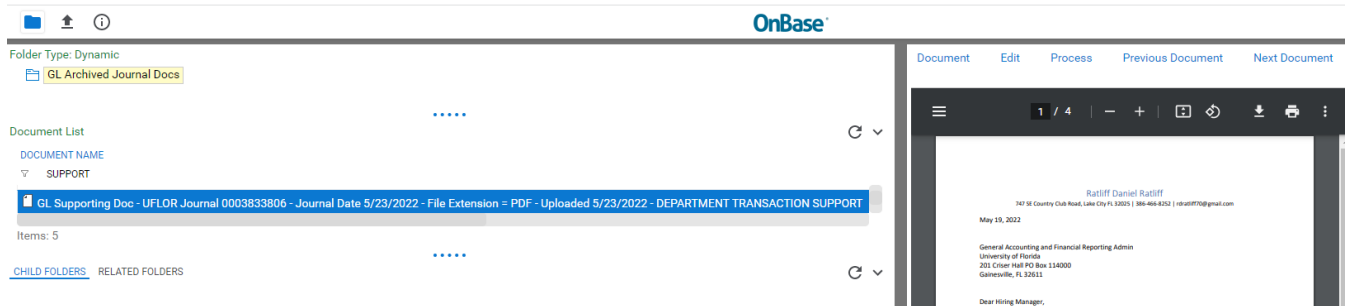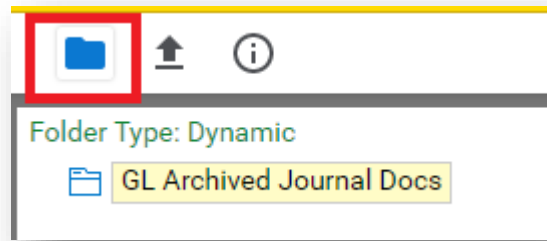4. Click the **Import** button at the bottom left of the screen.

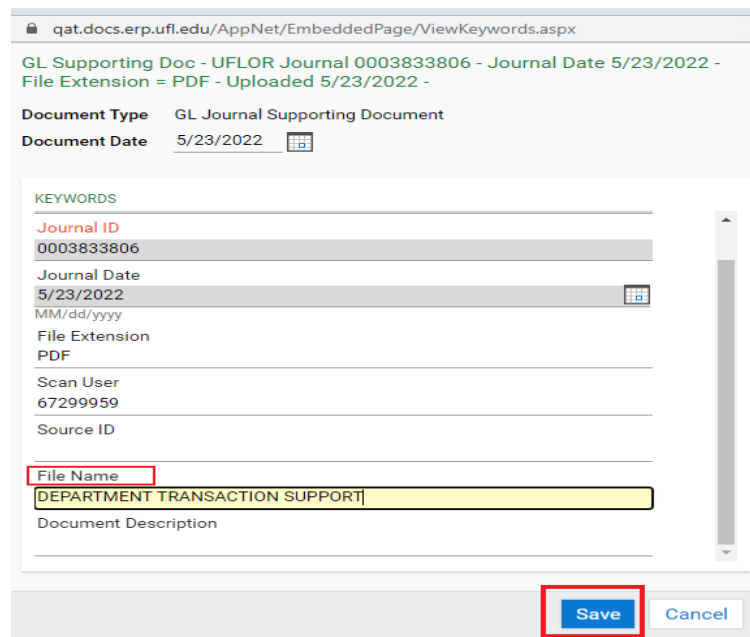5. An **Imported Successfully** message will appear once document is uploaded

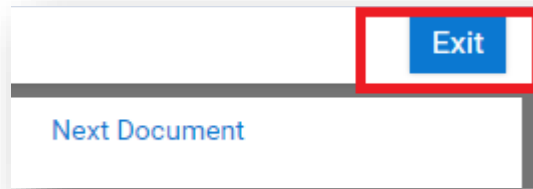6. Repeat **steps 2-5** to **upload additional documents**

7. Once done, return to the **document folder** to **review or edit the attachment(s)**, if needed.

8. To add to the description of a document, right click on the document and select **Keywords**. Fill in the **File Name** field and hit **Save**. This step is optional.

9. Click **Exit** at the top right corner to return to Journal Entry in myUFL.

Important: Deleting a Journal Attachment

Sometimes an attachment needs to be deleted if it's not necessary or is the wrong file. Deleting Journal Attachments is restricted to the core office. If there is a journal attachment you need removed from OnBase, email GL Journal (GLJournal@ad.ufl.edu), to have the attachment removed.

OTHER NOTES

The PeopleSoft/MyUFL attachments method is no longer supported and all prior JE supporting documentation is now available in OnBase.
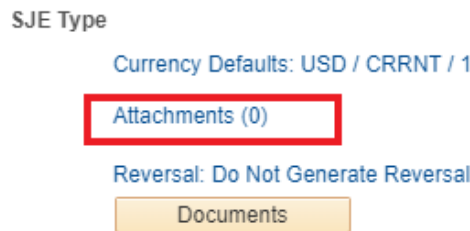
Your journal must have a saved status in myUFL before you can attach documents through OnBase.
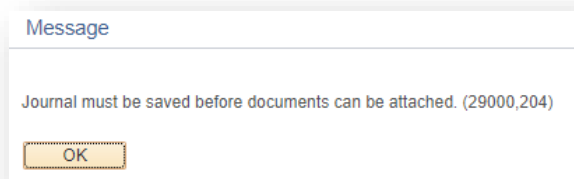
FOR ADDITIONAL ASSISTANCE

Technical Help	**Processes and Policies**
UF Computing Help Desk	General Accounting
352-392-HELP	352-392-1326
helpdesk@ufl.edu	gahelp@ad.ufl.edu
	http://www.fa.ufl.edu/departments/general-accounting/