

How to Add an Attachment

Once a journal has been entered, an attachment can be added

Navigation: Main Menu → Financials → General Ledger → Journals → Journal Entry → Create/Update Journal Entries

The screenshot shows the 'Header' tab of a journal entry form. At the top, there are tabs for 'Header', 'Lines', 'Totals', 'Errors', and 'Approval'. The form contains several fields: 'Unit' (UFLOR), 'Journal ID' (0001231234), and 'Date' (01/01/2018). The 'Long Description' field contains 'To transfer to Dept 00000011' with a note '226 characters remaining'. Other fields include '*Ledger Group' (ACTUALS), 'Adjusting Entry' (Non-Adjusting Entry), 'Ledger', 'Fiscal Year' (2018), '*Source' (ONL), 'Period' (7), 'Reference Number' (12345678), 'ADB Date' (01/01/2018), 'Journal Class', and 'Transaction Code' (CASH). There are also checkboxes for 'Auto Generate Lines', 'Save Journal Incomplete Status', 'Autobalance on 0 Amount Line', and 'CTA'. A link for 'Attachments (0)' is highlighted with a red box. Below it, there is a 'Reversal: Do Not Generate Reversal' option and a 'Commitment Control' link. The 'SJE Type' field is also visible.

- Once you are in the journal (header tab), click on [Attachments \(0\)](#)
- Click on "Add Attachment"

The screenshot shows the 'Journal Entry Attachments' dialog box. At the top, it displays 'Unit UFLOR', 'Journal ID 0001231234', and 'Date 01/01/2018'. Below this is a 'Details' section with a table. The table has columns for 'File Name', 'Show to Approver?', 'Description', 'User', 'Name', and 'Date/Time Stamp'. The 'View' row has a checked checkbox in the 'Show to Approver?' column. Below the table, there is a message: 'Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.' At the bottom, there are two buttons: 'Add Attachment' (highlighted with a red box) and 'OK'.

- 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, click "OK" at the bottom of the screen

Journal Entry Attachments

Unit UFLOR Journal ID 0001231234 Date 01/01/2018

Details Personalize | Find | View All | | First 1 of 1 Last

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
0001231234.pdf	<input checked="" type="checkbox"/>	<input type="text"/>			

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

- Once you have clicked "OK" you are taken back to the 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:

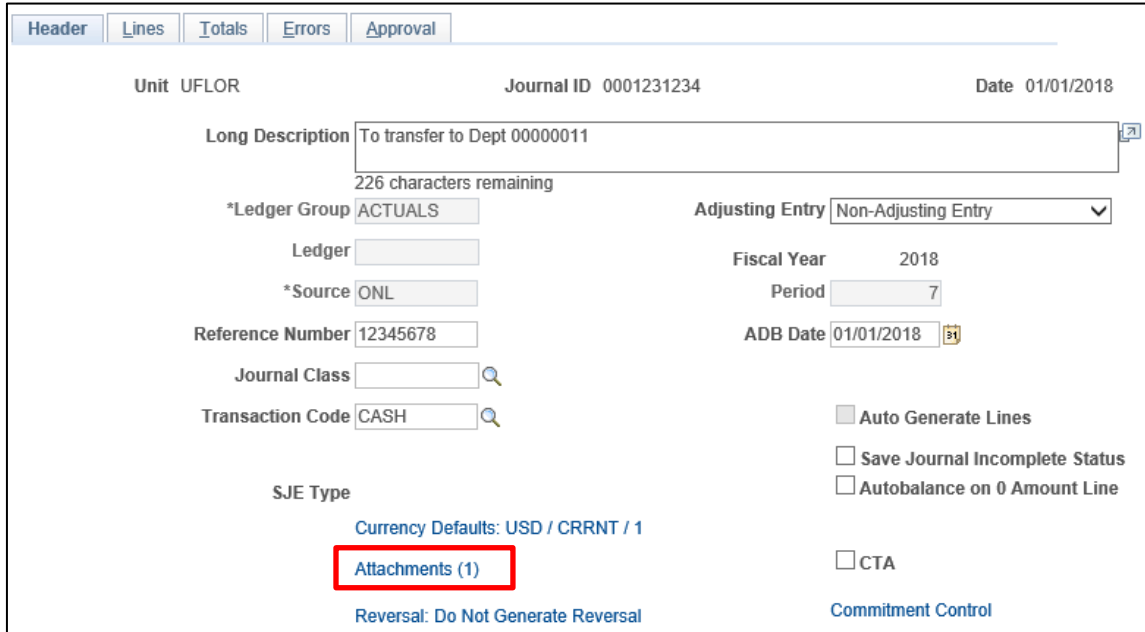
- When an attachment has been added, the date and time and the UFID of the individual who has added the attachment will appear on the Attachment page
- The File Name of the attachment is limited to 60 characters (including spaces). If you try to



upload a file with more than 60 characters you will receive an error message stating that the "Attachment failed to upload."

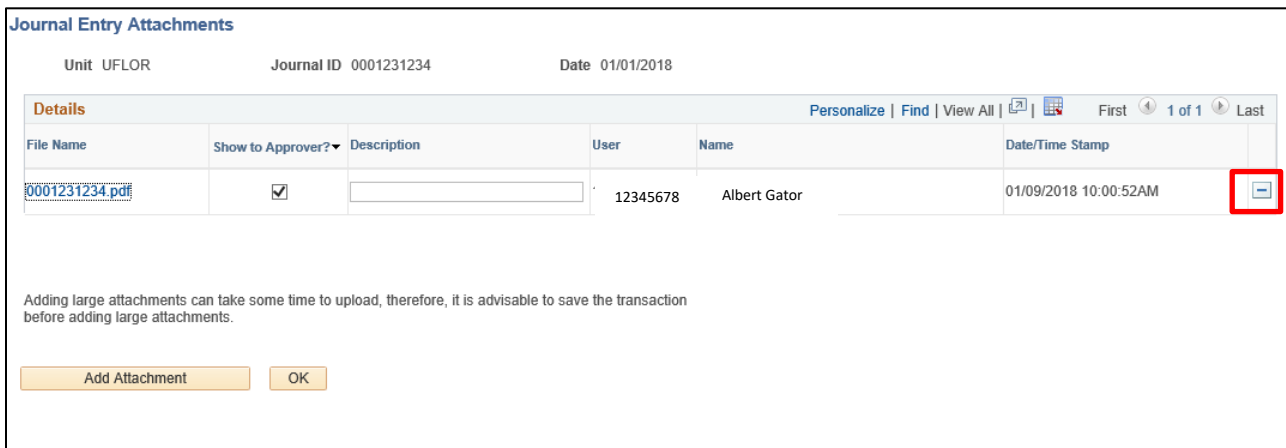
How to Delete an Attachment

- Deleting has practically the same steps, but remember you **CANNOT** delete an attachment that is attached to a **POSTED** journal
- Once you are in the journal (header tab), click on [Attachments \(1\)](#)



The screenshot shows the 'Header' tab of a journal entry. The 'Attachments (1)' link is highlighted with a red box. Other visible fields include: Unit UFLOR, Journal ID 0001231234, Date 01/01/2018, Long Description 'To transfer to Dept 00000011', *Ledger Group ACTUALS, Adjusting Entry Non-Adjusting Entry, Ledger, Fiscal Year 2018, *Source ONL, Period 7, Reference Number 12345678, ADB Date 01/01/2018, Journal Class, Transaction Code CASH, SJE Type, Currency Defaults: USD / CRRNT / 1, Auto Generate Lines, Save Journal Incomplete Status, Autobalance on 0 Amount Line, CTA, and Commitment Control.

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



The screenshot shows the 'Journal Entry Attachments' page. The table below has one row with a minus sign icon highlighted in a red box.

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
0001231234.pdf	<input checked="" type="checkbox"/>		12345678	Albert Gator	01/09/2018 10:00:52AM

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

- 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