## Adding an Attachment to a Journal Header Created March 2024

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## Adding an Attachment to a Journal Header

Core-

In Core-CT 9.1 users can add attachments to Online Journal headers.

Procedure

Navigation:			
Core-01   O	Menu 🤟 Search in Menu	Q	∆ ÷ € ⊙
			Nav Bar

Nav bar > Main Menu > Core-CT Financials > General Ledger > Journals > Journal Entry > Create/Update Journal Entries

OR

Select *Core-CT Financials* Click the *General Ledger and KK* Tile

Core-CT Financials ∽			
	eProcurement	Procurement Contracts	Supplier Contracts
	Purchasing	Accounts Payable	General Ledger and KK
	Accounts Receivable	Billing	Asset Management and Tracking
	Inventory	Project Costing	

## Click the *GL Workcenter* Tile

General Ledger and KK			
	Approvals	GL WorkCenter	GL Navigation Collection
	Structure Template	Structure Request	Create/Update Journals
	Enter Budget Journals	Review Budget Details	Review Budget Checking Status

Select Create/Update Journal Entries

Welcome to WorkCenter
00
> My Work
~ Links
Manage and Monitor Journals
Create/Update Journal Entries
Copy Journals
Spreadsheet Journal Import
Edit Journals
Mark Journals for Posting
Post Journals
Enter Budget Journals
Enter Budget Transfer
Budget Exceptions
Other Links V
Tree Mananer
Tree Viewer
Process Monitor
Project ID Request Form
Structure Request
Payroll Acct Code Request Form
Inquiry Business Request
Approval/Review a Form

nte/Update Journal Entries			
eate/Update Jo	rnal Entries		
ld a New Value		Q Find an Existing Value	
Business Unit DOC	11 Q		
*Journal ID NEX			
Journal Date 03/2	2024		
Journal Date 03/2	2024		

Step	Action
1.	Click the Find an Existing Value tab.
	Q Find an Existing Value
2.	Click the Clear button to clear the search fields.
	Clear
3.	Enter <b>STATE</b> into the <b>Business Unit</b> field.
4.	Input the Journal ID.

Find an Existing Value		⊕Add a New Value
✓ Search Criteria		
Enter any information you have and click Search. L	eave fields blank for a list of all values.	
Recent Searches Choose from recent searches	✓ Ø ☐ Saved Searches Choose from saved searches	~ <i>I</i>
Business Unit	= <b>v</b> Q	
Journal ID	begins with 🗸	
Journal Date		
Document Sequence Number	begins with 🗸	
Line Business Unit	= <b>v</b> Q	
Journal Header Status	= •	
Budget Checking Header Status	= •	
Source	= <b>v</b> Q	
Entered By	begins with 🖌 🔍	
Attachment Exist	= •	
Journal Class	begins with 🖌 🔍	
	15	
Case Sensitive		
Search	Clear Save Search	

Step	Action
5.	Click the <b>Search</b> button.
	Search

Header Lines Totals	Errors Approval					
Unit STATE	Journal ID BI02296890	Date 02/13/2024				
Long Description	BI Billing	园 人				
	244 characters remaining					
*Ledger Group	MOD_ACCRL Adjusting Entry	Non-Adjusting Entry				
Ledger	Fiscal Year	2024				
*Source	BI Q Period	8				
Reference Number	ADB Date	02/13/2024				
Journal Class	Q					
Transaction Code	Q	Auto Generate Lines				
SJE Type		☐ Save Journal Incomplete Status ☐ Autobalance on 0 Amount Line				
	Currency Defaults: USD / / 1	ПСТА				
	Attachments (0)					
	Reversal: Do Not Generate Reversal	Commitment Control				
Entered By						
Entered On 0	Entered On 02/16/2024 12:25:18PM					
Last Undated On	Maan-10-20-1 Construction					
Save Return to Search Pre	evious in List Next in List Notify Refresh	Add Update/Display				
Header   Lines   Totals   Errors   A	pproval					

Step	Action
6.	This journal currently has no attachments.
	Click the Attachments (0) link to add an attachment.
	Attachments (0)

	Journal Entry Attachments				×			
Unit	STATE	Journal ID BI02296890	Date	02/13/2024				Help
Details					K < 1-1	of 1 🗸 > >	View All	
File Name	Show to Approver?	Description	User	Name		Date/Time Stamp		
View							-	
Adding large before addir A	Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.           Add Attachment         OK							

Step	Action
7.	Click the Add Attachment button.
	Add Attachment

			Journal Entry Attachments		
Unit	STATE	Journal ID BI02296890	Date 02/13/2024		Help
Details			File Attachment ×	I< < 1-1 of 1 ✓ > >   View All	
File Name	Show to Approver?	Description	Choose File No file chosen	Date/Time Stamp	
View			Upload Cancel	-	
Adding larg before addir A	e attachments can take ig large attachments. dd Attachment	some time to upload, therefore, it is ad	is		

Step	Action
8.	Click the Choose File button.
	Choose File

Open				×
← → · ↑ 🖡 « [	Occuments > Training Sample	ٽ ~	Search Training Sample	Q
Organize 🔹 New fol	der			
📙 Navigation 2202 🖍	Name		Status	Date modifi
📜 Training Sample	<b>O</b> B107		$\odot$	3/4/2024 1
📑 Videos	📴 Sample		$\odot$	3/4/2024 1
📥 OneDrive - State c				
📕 Apps				
Attachments				
E Desktop				
Documents				
Pictures				
Recordings				
🧢 This PC				
~	< <			>
File n	ame:	~	All Files	$\sim$
	L.		Open	Cancel

Step	
9.	Click the <b>Sample</b> list item.

	Journal Entry Attachments									
Unit	STATE	Journal ID BI02296890	Date	02/13/2024				Help		
Details			File Attac	hment ×	K < 1-1 c	of 1 🗸 > >	View All			
File Name	Show to Approver?	Description	Choose File Sample.doc	x		Date/Time Stamp				
View			Upload Cancel				-			
Adding large before addir	e attachments can take ng large attachments.	some time to upload, therefore, it is advis		_						
A	ad Attachment									

Step	Action
10.	Click the <b>Upload</b> button.
	Upload

He

Step	Action
11.	Use the <b>Description</b> field to add a brief description of the attached file.
	Enter the <b>Sample File</b> into the <b>Description</b> field.

Unit STATE Journal ID BI02296890 Date 02/13/2024     Details     File Name Show to Approver? Description User Name Date/Time Stamp     Sample docx Image: Sample File     Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction.	tachments	Atta	Journal Er				
Details         Image: Constraint of the system of the sy	02/13/2024	e 02	ſ	BI02296890	Journal ID		Unit STATE
Image: Construction       Image: Construction<							ails
Show to Approver?       Description       User       Name       Date/Time Stamp         Sample.docx       Image: Complex	< < 1-1 of 1 → > >    View A						, Q
Sample.docx Sample File	Name Date/Time Stamp		Use		Description	Show to Approver?	e Name Aj
Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction					Sample File		mple.docx
before adding large attachments.	<u> </u>	tion	visable to save the tran	herefore, it is ac	e time to upload, t	✓ can take some ments.	ding large attachments c ore adding large attachm

Step	Action
12.	Click the Add Attachment button.
	Add Attachment

			Journal Entry Attachments	
Unit STAT	E	Journal ID BI0229	96890 Date 02/13/2024	Help
			File Attachment     ×     I     <	
File Name	Show to Approver?	Description	Choose File   No file chosen Date/Time Stamp	
Sample.docx		Sample File	Upload Cancel	
Adding large attach before adding large	iments can take some attachments.	e time to upload, therefore,	e, it is advis	
Add Atta	chment	ОК		

Step	Action
13.	Click the Choose File button.
	Choose File

Open 📀			×
	Documents > Training Sample 🗸 🗸	Search Training Sample	Q
Organize • New fol	der		
🕌 Videos 🧖	Name	<ul> <li>Status</li> </ul>	Date modif
📥 OneDrive - State c	A B107	0	3/4/2024 1
Apps	🖼 Sample	$\odot$	3/4/2024 1
Attachments			
Desktop			
Documents			
Pictures			
Recordings			
S This PC			
🔮 Network			
~	< <		>
File n	iame:	All Files	~
		Open C	Cancel

Step	Action
14.	Click the <b>B107</b> list item.
15.	Click the <b>Open</b> button.

			Journal Entry Attachments		
Unit STAT	E	Journal ID BI0229689	0 Date 02/13/2024		Help
Details			File Attachment ×	< < 1-1 of 1 ✓ > >    View All	
File Name	Show to Approver?	Description	Choose File B107.pdf	Date/Time Stamp	
Sample.docx		Sample File	Upload Cancel		
Adding large attack before adding large	nments can take som e attachments. Ichment	e time to upload, therefore, it is	advis		

Step	Action
16.	Click the Upload button.
	Upload

		Journ	nal Entry Attachr	nents		×
Unit STATE		Journal ID BI02296890	Date 02/13	/2024		Help
E, Q				<	of 2 🗸 > 🖂   View A	11
File Name	Show to Approver?	Description	User	Name	Date/Time Stamp	
Sample.docx		Sample File			-	
B107.pdf					-	
Adding large attachn before adding large a	nents can take some attachments. hment	time to upload, therefore, it is advisable to save t	he transaction			

Step	Action
17.	Use the Description field to add a brief description of the attached file.
	Enter <b>Sample File 2</b> into the <b>Description</b> field.

		Journ	nal Entry Attachn	nents			×
Unit STATE		Journal ID BI02296890	Date 02/13	/2024			Help
Details							
EF Q				<pre>&lt; 1-2 of 2</pre>	$\checkmark$ > >	View All	
File Name	Show to Approver?	Description	User	Name	Date/Time Stamp		
Sample.docx		Sample File				-	
B107.pdf		Sample File 2				-	
Adding large attachn before adding large a Add Attac	nents can take some attachments.	: time to upload, therefore, it is advisable to save the observation of the observation o	he transaction			h	

Step	Action
18.	Click the <b>B107.pdf</b> link to view the attached file.
	<u>B107.pdf</u>

<ul> <li></li> <li></li> <li></li> </ul>	Create/Update Journal Entries ×	Image: Bio7.pdf       ×       +         Image: Bio7.pdf       ×       + <td< th=""><th>– 🗆 Finish u</th><th>× odate :</th></td<>	– 🗆 Finish u	× odate :
≡	B107.pdf	1 / 1   - 100% +   🖸 🕹	± 6	• •
	1	TestSample		

Step	Action		
19.	The attached file displays in a new window.		
20.	Click the Close button.		

		Journ	al Entry Attachn	nents			×
Unit STATE		Journal ID BI02296890	Date 02/13	/2024			Help
E, Q				< < 1-2 of 2	$\checkmark$ > >	View All	
File Name	Show to Approver?	Description	User	Name	Date/Time Stamp		
Sample.docx		Sample File				-	
B107.pdf		Sample File 2				-	
Adding large attachm before adding large a	nents can take some attachments.	time to upload, therefore, it is advisable to save th	ne transaction				

Step	Action
21.	Click the <b>OK</b> button.
	ОК

Header Lines Totals	<u>E</u> rrors <u>Approval</u>		
Unit STATE	Journal ID BI02296890	Date 02/13/2024	
Long Description	BI Billing	₽ ×	
	244 characters remaining		
*Ledger Group	MOD_ACCRL Adjusting Entry	Non-Adjusting Entry	
Ledger	Fiscal Year	2024	
*Source	BI Q Period	8	
Reference Number	ADB Date	02/13/2024	
Journal Class	Q		
Transaction Code	Q	Auto Generate Lines	
SJE Type	Currency Defaulte: LICD // 4	□ Save Journal Incomplete Status □ Autobalance on 0 Amount Line	
	Attachments (2)	СТА	
' 	Reversal: Do Not Generate Reversal	Commitment Control	
Entered By			
Entered On 0	2/16/2024 12:25:18PM		
Last Updated On 02/27/2024 2:29:19PM			
Save Return to Search Pre	evious in List Next in List Notify Refresh	Add Update/Display	
Header   Lines   Totals   Errors   Approval			

Step	Action
22.	There are now two (2) attachments associated with the journal header.
23.	Click the Save button.
	Save
25.	
	End of Procedure.