

Adding an Attachment to a Journal Header

Created March 2024

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Adding an Attachment to a Journal Header



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

Navigation:

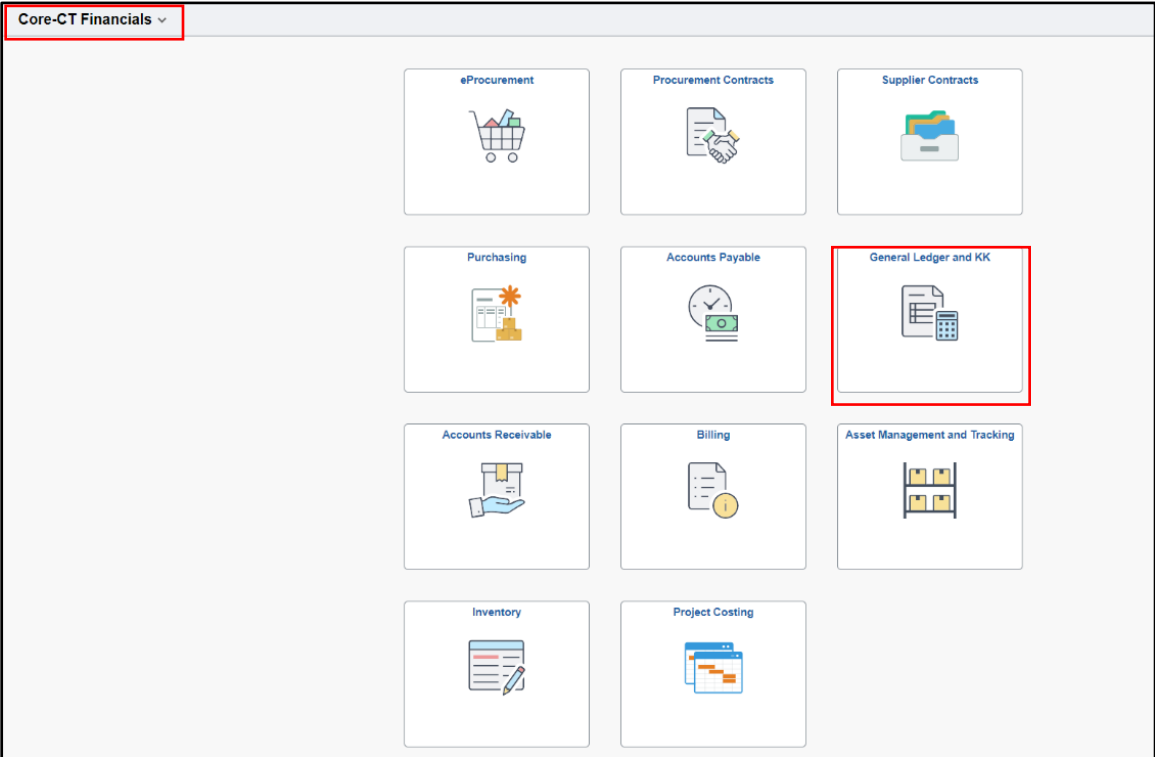


Nav Bar

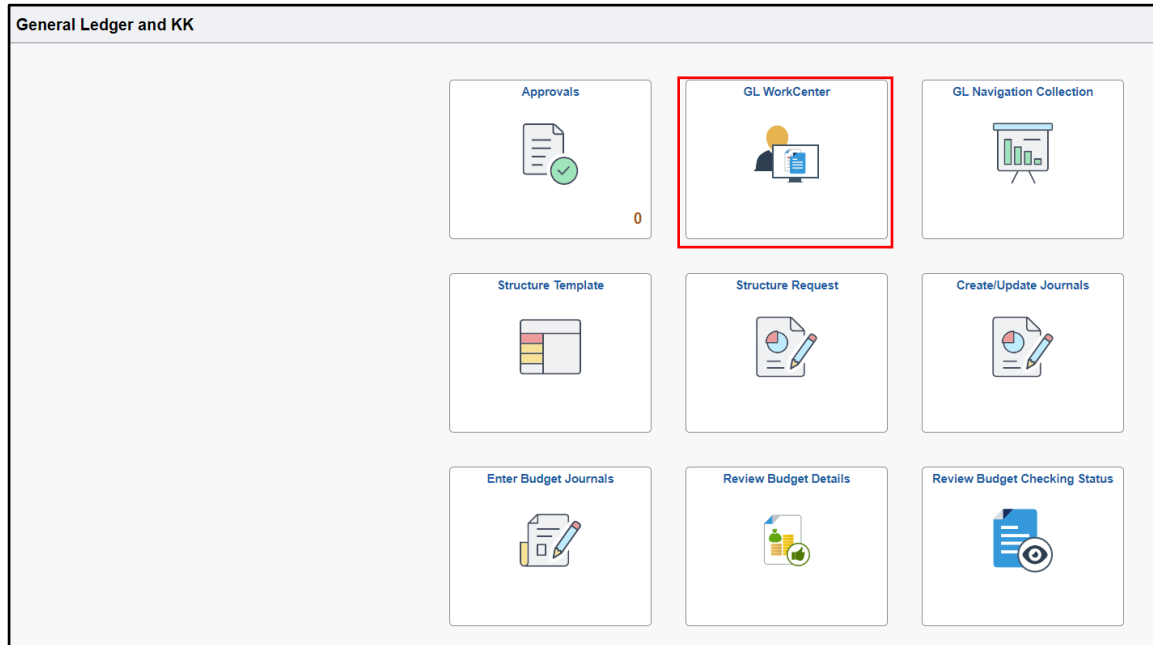
Nav bar > Main Menu > Core-CT Financials > General Ledger > Journals > Journal Entry > Create/Update Journal Entries

OR

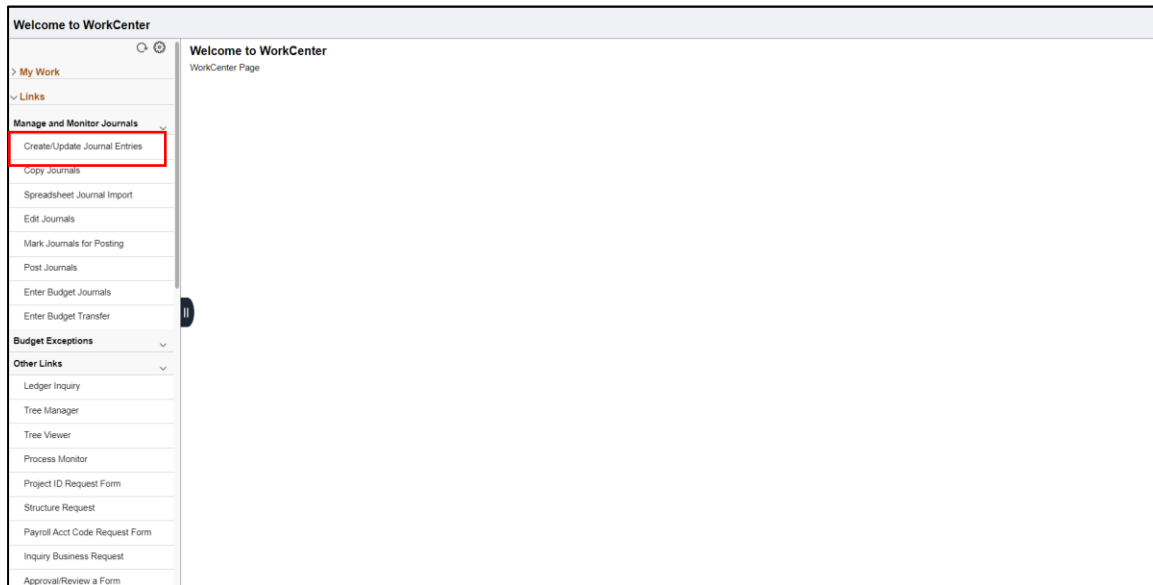
Select *Core-CT Financials*
Click the *General Ledger and KK* Tile



Click the *GL Workcenter* Tile



Select *Create/Update Journal Entries*



Create/Update Journal Entries

Create/Update Journal Entries

Add a New Value [Find an Existing Value](#)

*Business Unit

*Journal ID

*Journal Date

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

Find an Existing Value [Add a New Value](#)

▼ **Search Criteria**
Enter any information you have and click Search. Leave fields blank for a list of all values.

Choose from recent searches Choose from saved searches

Business Unit =

Journal ID begins with

Journal Date =

Document Sequence Number begins with

Line Business Unit =

Journal Header Status =

Budget Checking Header Status =

Source =

Entered By begins with

Attachment Exist =

Journal Class begins with

^ [Show fewer options](#)

Case Sensitive

Step	Action
5.	Click the Search button.



Header
Lines
Totals
Errors
Approval

Unit STATE Journal ID BI02296890 Date 02/13/2024

Long Description

244 characters remaining

*Ledger Group

Adjusting Entry

Ledger

Fiscal Year

*Source

Period

Reference Number

ADB Date

Journal Class

Auto Generate Lines

 Save Journal Incomplete Status

 Autobalance on 0 Amount Line

Transaction Code

CTA

Commitment Control

SJE Type

Currency Defaults: USD / / 1

Attachments (0)

Reversal: Do Not Generate Reversal

Entered By

Entered On 02/16/2024 12:25:18PM

Last Updated On 02/27/2024 2:20:10PM

Save
Return to Search
Previous in List
Next in List
Notify
Refresh

Add
Update/Display

Header | Lines | Totals | Errors | Approval

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

Journal Entry Attachments
Help

Unit STATE Journal ID BI02296890 Date 02/13/2024

Details

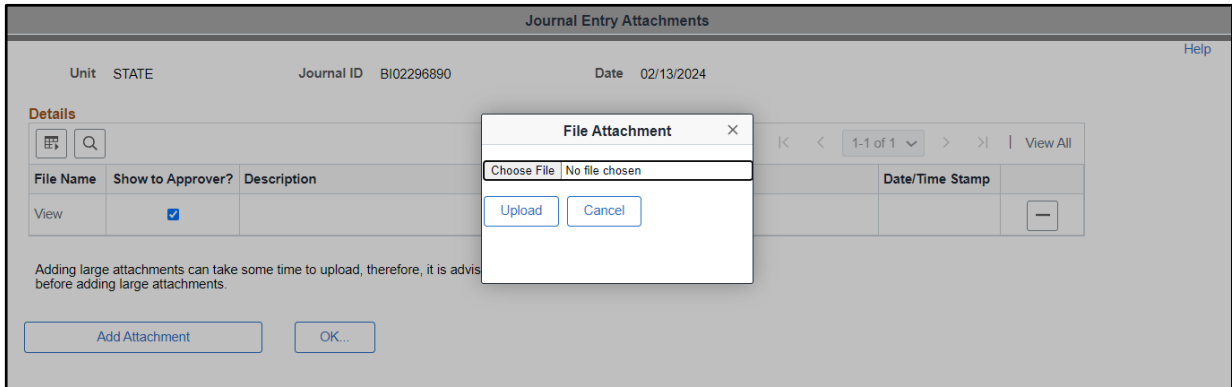
1-1 of 1 | View All

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

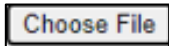
Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

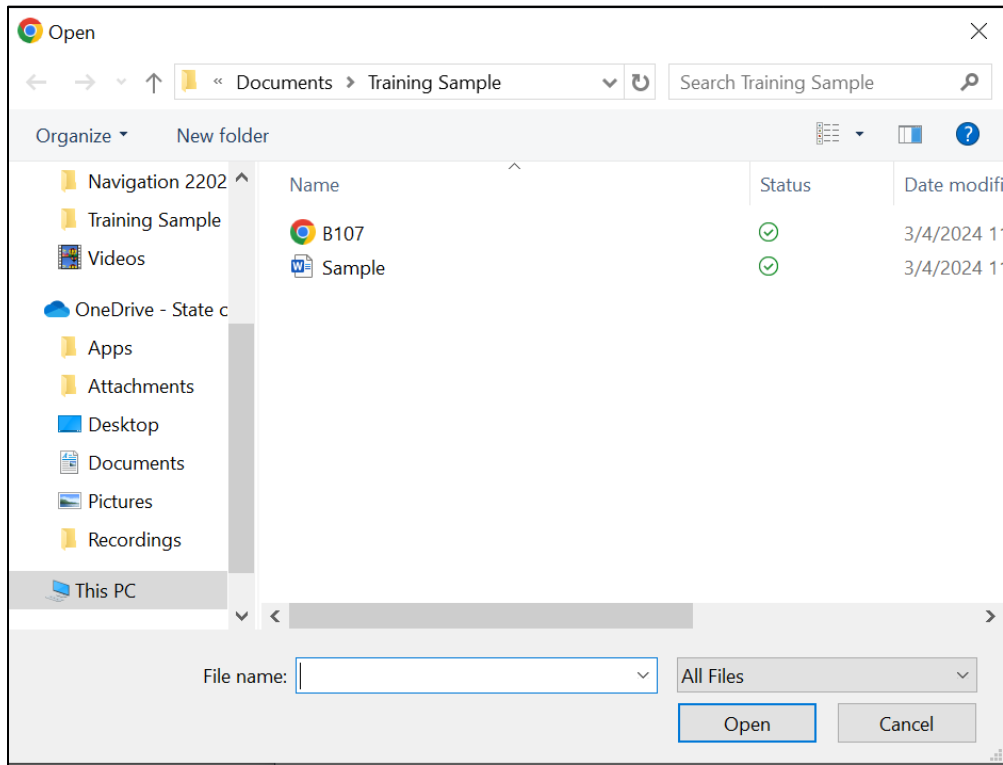
Add Attachment
OK...

Step	Action
7.	Click the Add Attachment button.

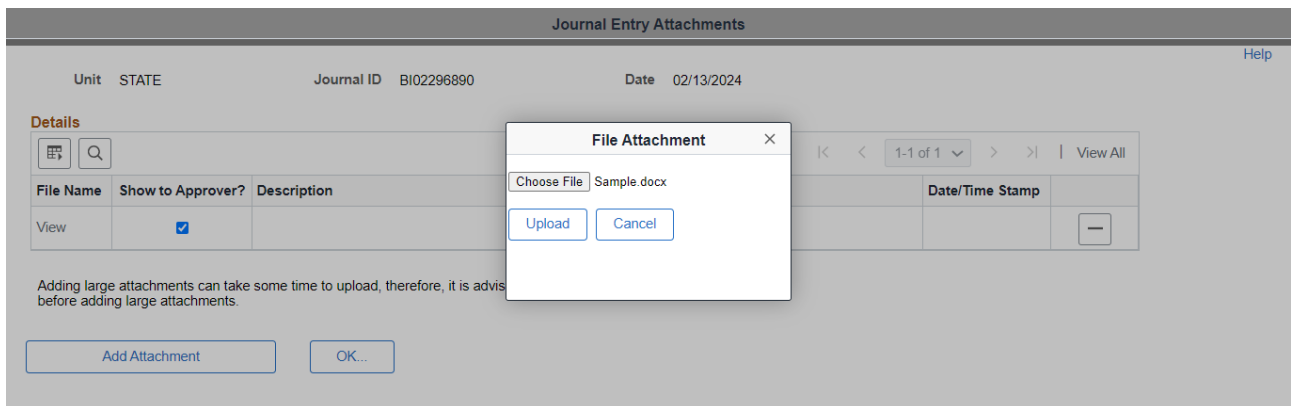


Step	Action
8.	Click the Choose File... button.





Step	
9.	Click the Sample list item.



Step	Action
10.	Click the Upload button.



Journal Entry Attachments

Unit STATE Journal ID BI02296890 Date 02/13/2024 [Help](#)

Details

File Name Show to Approver? Description User Name Date/Time Stamp

Sample.docx	<input checked="" type="checkbox"/>					
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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
11.	Use the Description field to add a brief description of the attached file. Enter the Sample File into the Description field.

Journal Entry Attachments

Unit STATE Journal ID BI02296890 Date 02/13/2024 [Help](#)

Details

File Name Show to Approver? Description User Name Date/Time Stamp

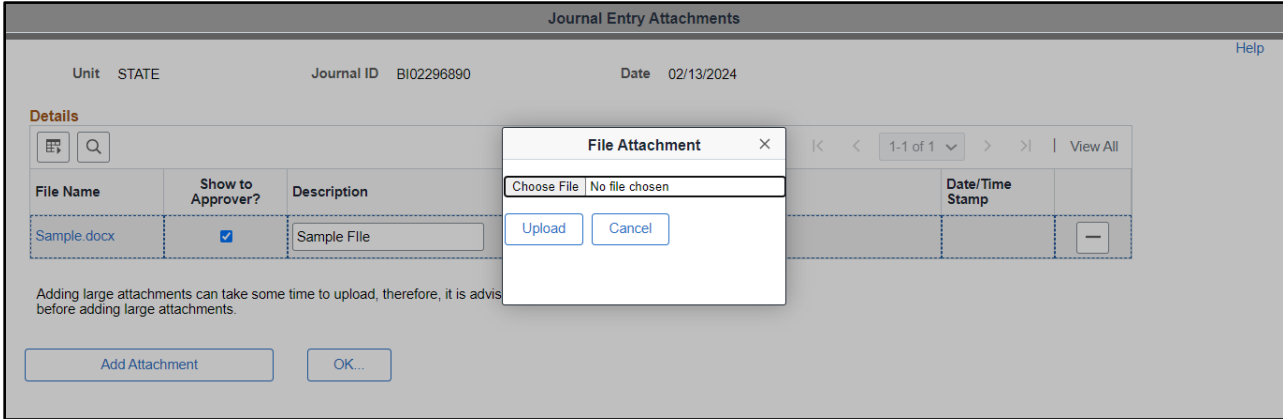
Sample.docx	<input checked="" type="checkbox"/>	Sample File				
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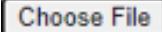
Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

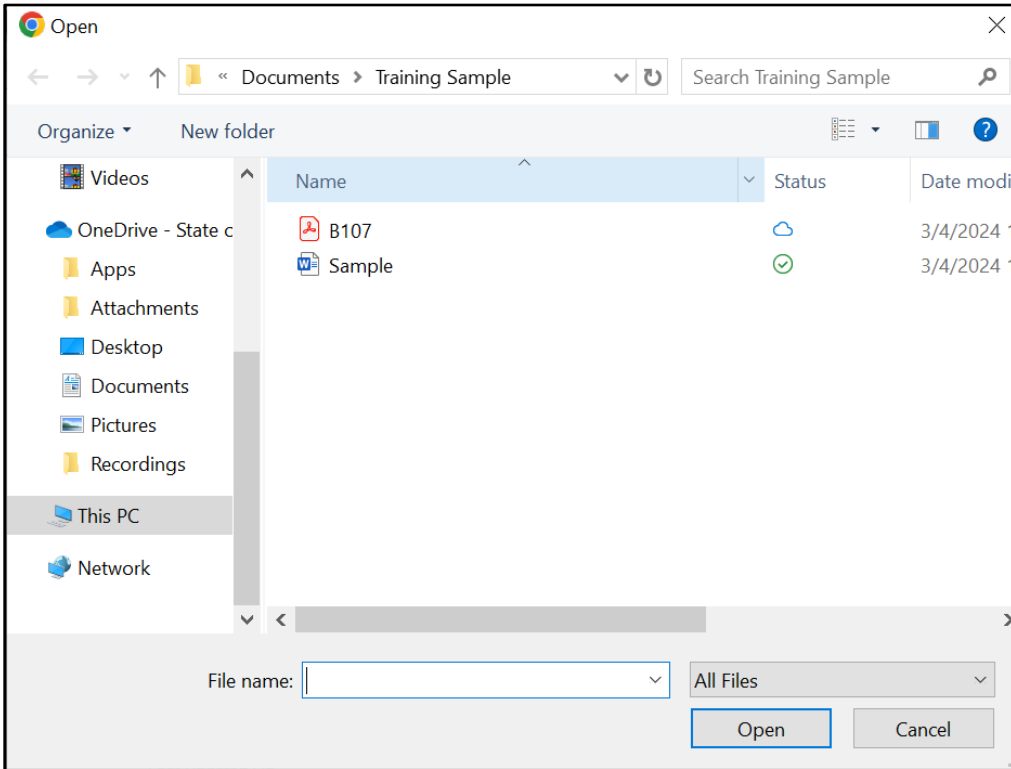
[Add Attachment](#) [OK...](#)


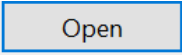
Step	Action
12.	Click the Add Attachment button.





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



Step	Action
14.	Click the B107 list item. 
15.	Click the Open button. 

Journal Entry Attachments

Unit STATE Journal ID BI02296890 Date 02/13/2024 [Help](#)

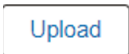
Details

File Name	Show to Approver?	Description	Date/Time Stamp
Sample.docx	<input checked="" type="checkbox"/>	Sample File	

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

File Attachment

Choose File B107.pdf

Step	Action
16.	Click the Upload button. 

Journal Entry Attachments

Unit STATE Journal ID BI02296890 Date 02/13/2024 [Help](#)

Details

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
Sample.docx	<input checked="" type="checkbox"/>	Sample File			
B107.pdf	<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.

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

Journal Entry Attachments

Unit STATE Journal ID B102296890 Date 02/13/2024

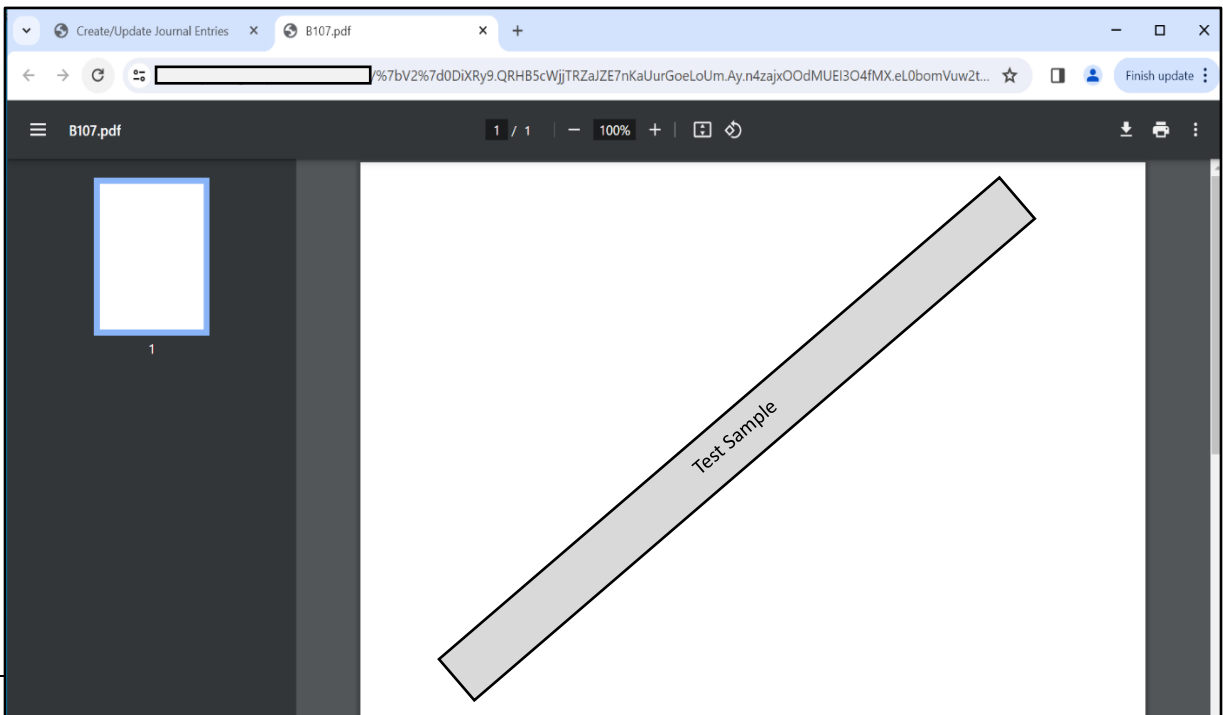
Details

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
Sample.docx	<input checked="" type="checkbox"/>	Sample File			
B107.pdf	<input checked="" type="checkbox"/>	Sample File 2			

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
18.	Click the B107.pdf link to view the attached file.



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

Journal Entry Attachments x

[Help](#)

Unit STATE Journal ID BI02296890 Date 02/13/2024

Details

1-2 of 2 | [View All](#)

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp	
Sample.docx	<input checked="" type="checkbox"/>	Sample File				-
B107.pdf	<input checked="" type="checkbox"/>	Sample File 2				-

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

Step	Action
21.	Click the OK button. <input type="button" value="OK..."/>

Header | [Lines](#) | [Totals](#) | [Errors](#) | [Approval](#)

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 Period 8

Reference Number ADB Date 02/13/2024

Journal Class Auto Generate Lines

Transaction Code Save Journal Incomplete Status

SJE Type Autobalance on 0 Amount Line

Currency Defaults: USD // 1

Attachments (2)

Reversal: Do Not Generate Reversal CTA


Commitment Control

Entered By

Entered On 02/16/2024 12:25:18PM

Last Updated On 02/27/2024 2:29:19PM

Header | [Lines](#) | [Totals](#) | [Errors](#) | [Approval](#)

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