

## 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.

### NAVIGATION

Log into myUFL with your GatorLink username/password.

1. Click **Main Menu**
2. Click **Financials**
3. Click **General Ledger**
4. Click **Journals**
5. Click **Journal Entry**
6. Click **Create/Update Journal Entries**

### JOURNAL ENTRY HEADER TAB

7. 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.

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 displays the following information:

- Unit: UFLOR, Journal ID: 0003833806, Date: 05/23/2022
- Long Description: Transfer Spring 2022 Scholarships (221 characters remaining)
- \*Ledger Group: ACTUALS, Adjusting Entry: Non-Adjusting Entry
- Fiscal Year: 2022, Period: 11, ADB Date: 05/23/2022
- \*Source: ONL, Reference Number, Journal Class, Transaction Code: CASH
- SJE Type: Currency Defaults: USD / CRRNT / 1, Attachments: (0)
- Reversal: Do Not Generate Reversal
- Buttons: Auto Generate Lines, Save Journal Incomplete Status, Autobalance on 0 Amount Line, CTA, Commitment Control
- Entered By: 67299959, Entered On: 05/23/2022 2:08:03PM, Last Updated On: 05/23/2022 2:40:36PM
- Footer: Entered By: Joree, Salima
- Navigation: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Add, Update/Display

The 'Documents' button, located under the 'Reversal' section, is highlighted with a red rectangular box.

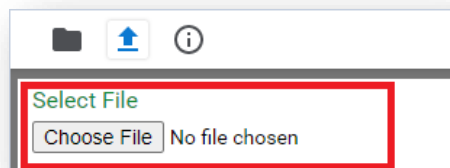
## ATTACH FILE IN ONBASE

Your journal must have a saved status in myUFL before you can attach documents through OnBase.

- Click the **Upload File** button (up arrow)



- Select a file to attach using the **Choose File** button

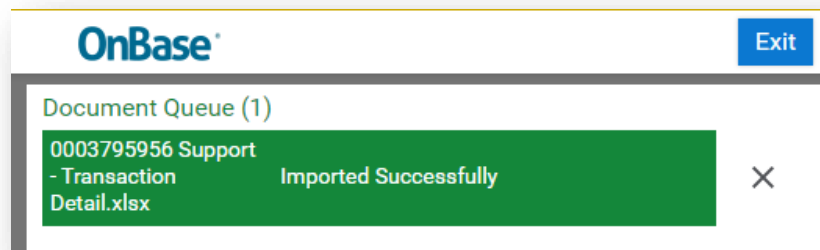


- Fill in the **File Extension**, **Source ID**, **File Name**, and **Document Description** to tag key words for the document

- Click the **Import** button

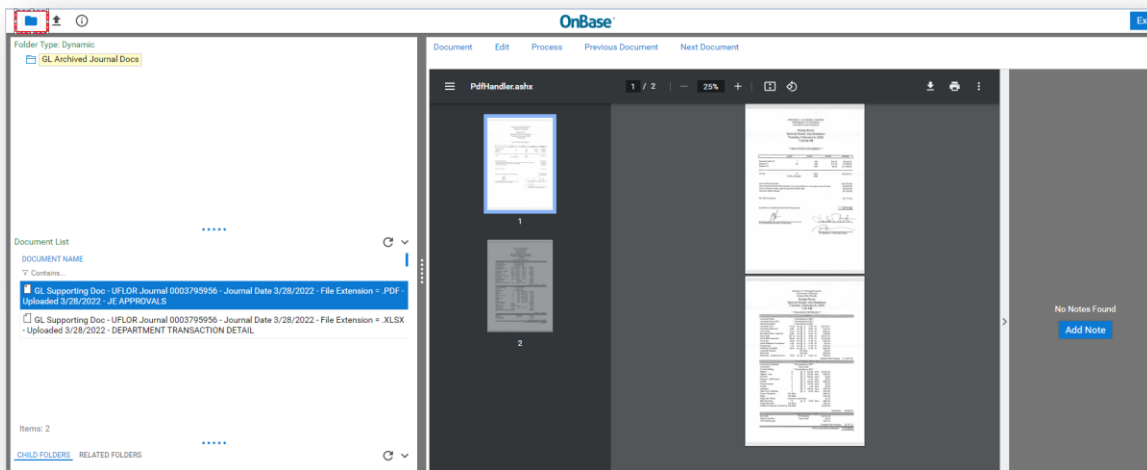
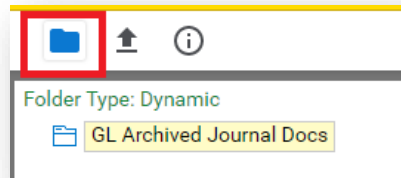


- An **Imported Successfully** message will appear once document is uploaded

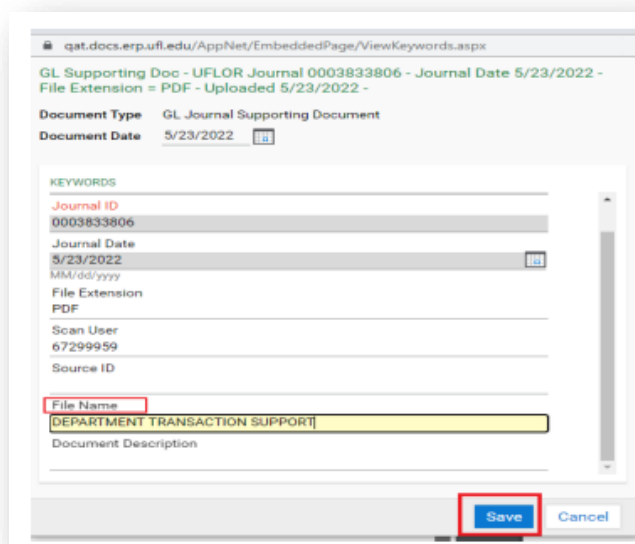


- Repeat **steps 8-12** to **upload additional documents**

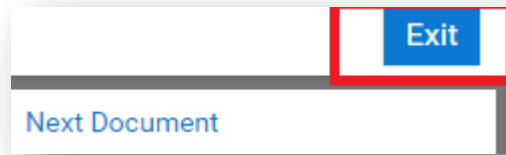
14. Once done, return to the **document folder** to **review or edit the attachments**, if needed



15. (Optional Step) To add to the description of a document, right click on the document and select **Keywords**. Fill in the **File Name** field and select **Save**.



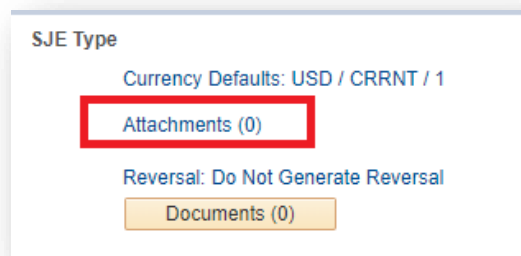
16. Click **Exit** to return to Journal Entry in myUFL



**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.

**NOTE:** The PeopleSoft/myUFL attachments method is no longer supported and all prior JE supporting documentation is now available in OnBase.



**FOR ADDITIONAL ASSISTANCE**

**Technical Help**

UF Computing Help Desk  
352-392-HELP  
[helpdesk@ufl.edu](mailto:helpdesk@ufl.edu)

**Processes and Policies**

General Accounting  
352-392-1326  
[gahelp@ad.ufl.edu](mailto:gahelp@ad.ufl.edu)  
<http://www.fa.ufl.edu/departments/general-accounting/>