

## **FIN How-to: Adding Attachments** <sup>[1]</sup>

In the Finance System (FIN), you can attach and view supporting documentation for transactions in all modules, including Assets, Billing, Accounts Receivable, etc. This page focuses on adding attachments to journal entries (JEs).

A JE typically needs one or more attachments that provide supporting documentation for the entry. There are several ways you can do this:

- You can add attachments to an individual JE using the Journal Entry - Header Page.
- You can add attachments to one or more JEs at a time using the Upload Journal Attachments page.
- You can add the same or different attachments to multiple JEs using the Multiple File Attachments link on the Upload Journal Attachments page.

## **Read the procedures**

### **Adding Attachments to one JE at a time – using the Journal Entry - Header page**

## **Watch the video**

To add attachments to one journal from the Journal Entry - Header page:

1. On the **Header** tab of the Journal Entry, click the **Attachments** link. A popup will appear.
2. Click **Add Attachment**.
3. Click **Choose File**.
4. Locate and select the file on your network.
5. Click **Open**. Depending on the size of the attachment it may take a little time to upload.
6. Click **Upload**.
7. You can now enter a *Description* to help other viewers understand the context of the attachment.
8. Repeat this process to add multiple attachments.
9. When you finish adding attachments, click **OK**.
10. The popup window closes, and you're back on the Journal Entry - Header tab.
11. The Attachments link will update to display the number of attachments in parentheses. Click the **Attachments** link to view your attachments.
12. **Save** your JE after adding attachments.

### **Adding attachments to multiple JEs - using Upload Journal Attachment on**

## the Upload Journal Attachment page

Rather than adding attachments when you create a JE, you can visit one page that lists all your JEs and then add attachments to one or more JEs at a time.

1. From the **Finance & Accounting** homepage, click on the **General Ledger** tile.
2. Use the menu on the left to select **Process Journals > Upload Journal Attachments**.
3. Search for JEs by JE ID, Source code, and Date.

← Finance Accounting

Upload Journal Attachment

Upload Journal Attachment

\*Unit

Journal ID From

To Journal ID

Source

Journal Date From

To Journal Date

Search

☐ Multiple File Attachment

☒ Select All ☐ Deselect All

Journals

Personalize | Find | View All |

First 1 of 1 Last

	Select for Multiple Attachment	Business Unit	Journal ID	Journal Date	Ledger Group	Attachments
1	<input type="checkbox"/>		Journal ID			Attachments (0)

Save

Notify

Refresh

4. Select the appropriate JE and click the **Attachments**

link.

### Upload Journal Attachment

\*Unit  Journal ID From  To Journal ID   
Source  Journal Date From  To Journal Date

☐ Multiple File Attachment

☒ Select All ☐ Deselect All

Journals						
Personalize   Find   View All   20   First 1-10 of 25 Last						
	Select for Multiple Attachment	Business Unit	Journal ID	Journal Date	Ledger Group	Attachments
1	<input type="checkbox"/>	UCOLO	0001771767	02/15/2023	ACTUALS	<a href="#">Attachments (0)</a>
2	<input type="checkbox"/>	UCOLO	0001771888	02/15/2023	ACTUALS	<a href="#">Attachments (2)</a>
3	<input type="checkbox"/>	UCOLO	0001771889	02/15/2023	ACTUALS	<a href="#">Attachments (2)</a>
4	<input type="checkbox"/>	UCOLO	0001771890	02/15/2023	ACTUALS	<a href="#">Attachments (2)</a>
5	<input type="checkbox"/>	UCOLO	0001771891	02/15/2023	ACTUALS	<a href="#">Attachments (2)</a>
6	<input type="checkbox"/>	UCOLO	0001772001	02/16/2023	ACTUALS	<a href="#">Attachments (1)</a>
7	<input type="checkbox"/>	UCOLO	0001772003	02/16/2023	ACTUALS	<a href="#">Attachments (1)</a>
8	<input type="checkbox"/>	UCOLO	0001772031	02/16/2023	ACTUALS	<a href="#">Attachments (1)</a>

5. Click **Add Attachment**.

6. In the **File Attachment** popup, click **Browse** to locate and select your file, then click **Upload**. Depending on your file attachment size, uploading may take a little time.

**Details** Personalize | Find | View All | 20 | First 1-10 of 25 Last

File Name	Show to Approver?	Description	User	Name	Date
<a href="#">View</a>	<input 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.

**File Attachment**

7. When you finish adding attachments, click **OK**.

8. The **Attachments** link for the JE will update to display the number of attachments in parentheses. You can click it to view your attachments... or you can click the **Attachments**

**< Finance & Accounting**

## General Ledger

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### Upload Journal Attachment

Unit  Journal ID From  To Journal ID

Source  Journal Date From  To Journal Date

☐ Multiple File Attachment

☒ Select All ☐ Deselect All

<b>Journals</b> Personalize   Find   View All    First 1-10 of 25 Last						
	Select for Multiple Attachment	Business Unit	Journal ID	Journal Date	Ledger Group	Attachments
1	<input type="checkbox"/>	UCOLO	0001771767	02/15/2023	ACTUALS	Attachments (1)
2	<input type="checkbox"/>	UCOLO	0001771808	02/15/2023	ACTUALS	Attachments (2)
3	<input type="checkbox"/>	UCOLO	0001771889	02/15/2023	ACTUALS	Attachments (2)
4	<input type="checkbox"/>	UCOLO	0001771890	02/15/2023	ACTUALS	Attachments (2)
5	<input type="checkbox"/>	UCOLO	0001771891	02/15/2023	ACTUALS	Attachments (2)
6	<input type="checkbox"/>	UCOLO	0001772001	02/16/2023	ACTUALS	Attachments (1)
7	<input type="checkbox"/>	UCOLO	0001772003	02/16/2023	ACTUALS	Attachments (1)
8	<input type="checkbox"/>	UCOLO	0001772031	02/16/2023	ACTUALS	Attachments (1)
9	<input type="checkbox"/>	UCOLO	0001772035	02/16/2023	ACTUALS	Attachments (1)

1. From the **Finance & Accounting** homepage, click the **General Ledger** tile.

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- 3.

Search for JEs by JE ID, Source code, and Date.

← Finance Accounting

Upload Journal Attachment

Upload Journal Attachment

\*Unit

Journal ID From

To Journal ID

Source

Journal Date From

To Journal Date

Search

☐ Multiple File Attachment

☒ Select All ☐ Deselect All

Journals

Personalize | Find | View All |

First 1 of 1 Last

	Select for Multiple Attachment	Business Unit	Journal ID	Journal Date	Ledger Group	Attachments
1	<input type="checkbox"/>		Journal ID			Attachments (0)

Save

Notify

Refresh

- Select the **Multiple File Attachments** checkbox.

Upload Journal Attachment

\*Unit

Journal ID From

To Journal ID

Source

Journal Date From

To Journal Date

Search

☒ Multiple File Attachment

Attach Files to Multiple Journals

☒ Select All ☐ Deselect All

Journals

Personalize | Find | View All |

First 1-10 of 25 Last

	Select for Multiple Attachment	Business Unit	Journal ID	Journal Date	Ledger Group	Attachments
1	<input type="checkbox"/>	UCOLO	0001771767	02/15/2023	ACTUALS	Attachments (2)
2	<input type="checkbox"/>	UCOLO	0001771888	02/15/2023	ACTUALS	Attachments (3)
3	<input type="checkbox"/>	UCOLO	0001771889	02/15/2023	ACTUALS	Attachments (3)
4	<input type="checkbox"/>	UCOLO	0001771890	02/15/2023	ACTUALS	Attachments (3)

-

Select all the JEs that will use the same attachment.

← Finance Accounting

Upload Journal Attachment

Upload Journal Attachment

\*Unit  Journal ID From  To Journal ID

Source  Journal Date From  To Journal Date

Search

☒ Multiple File Attachment Attach Files to Multiple Journals

☒ Select All ☐ Deselect All

Journals

Personalize | Find | View All | 25 | First 1-10 of 25 Last

	Select for Multiple Attachment	Business Unit	Journal ID	Journal Date	Ledger Group	Attachments
1	<input checked="" type="checkbox"/>	UCOLO	0001771767	02/15/2023	ACTUALS	Attachments (1)
2	<input checked="" type="checkbox"/>	UCOLO	0001771888	02/15/2023	ACTUALS	Attachments (2)
3	<input checked="" type="checkbox"/>	UCOLO	0001771889	02/15/2023	ACTUALS	Attachments (2)
4	<input checked="" type="checkbox"/>	UCOLO	0001771890	02/15/2023	ACTUALS	Attachments (2)
5	<input type="checkbox"/>	UCOLO	0001771891	02/15/2023	ACTUALS	Attachments (2)
6	<input type="checkbox"/>	UCOLO	0001772001	02/16/2023	ACTUALS	Attachments (1)
7	<input type="checkbox"/>	UCOLO	0001772003	02/16/2023	ACTUALS	Attachments (1)
8	<input type="checkbox"/>	UCOLO	0001772031	02/16/2023	ACTUALS	Attachments (1)

6. Click the **Attach Files to Multiple Journals** link.

← Finance Accounting

Upload Journal Attachment

Upload Journal Attachment

\*Unit  Journal ID From  To Journal ID

Source  Journal Date From  To Journal Date

Search

☒ Multiple File Attachment **Attach Files to Multiple Journals**

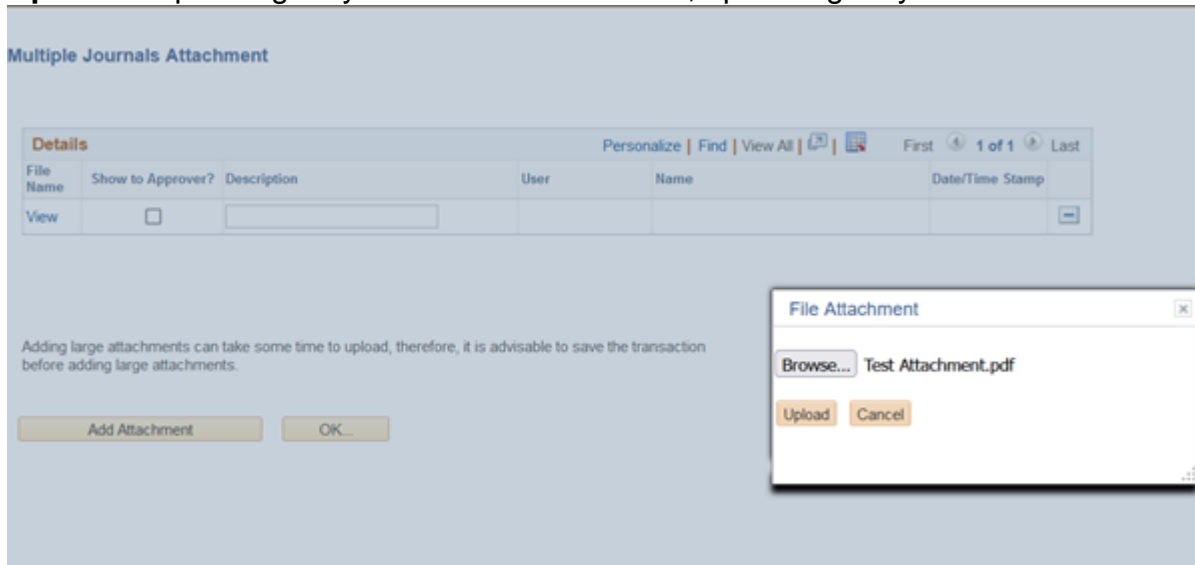
☒ Select All ☐ Deselect All

Journals

Personalize | Find | View All | 25 | First 1-10 of 25 Last

	Select for Multiple Attachment	Business Unit	Journal ID	Journal Date	Ledger Group	Attachments
1	<input checked="" type="checkbox"/>	UCOLO	0001771767	02/15/2023	ACTUALS	Attachments (1)
2	<input checked="" type="checkbox"/>	UCOLO	0001771888	02/15/2023	ACTUALS	Attachments (2)
3	<input checked="" type="checkbox"/>	UCOLO	0001771889	02/15/2023	ACTUALS	Attachments (2)
4	<input checked="" type="checkbox"/>	UCOLO	0001771890	02/15/2023	ACTUALS	Attachments (2)
5	<input type="checkbox"/>	UCOLO	0001771891	02/15/2023	ACTUALS	Attachments (2)
6	<input type="checkbox"/>	UCOLO	0001772001	02/16/2023	ACTUALS	Attachments (1)
7	<input type="checkbox"/>	UCOLO	0001772003	02/16/2023	ACTUALS	Attachments (1)
8	<input type="checkbox"/>	UCOLO	0001772031	02/16/2023	ACTUALS	Attachments (1)

7. From the Multiple Journals Attachment page, click **Add Attachment**.
8. In the **File Attachment** popup, click **Browse** to locate and select your file, then click **Upload**. Depending on your file attachment size, uploading may take a little time.



9. When you finish adding attachments, click **OK**.
10. The Attachments link for your selected JEs will update to display the number of attachments in parentheses. Click the **Attachments** link to view your attachments.

## Helpful Tip!

Is there something you forgot to attach? You can add supporting documentation at any time, even after the journal has posted. (Just be sure your Approvers have all the information they need when they review.)

## Have a question or feedback?

## Questions & Feedback <sup>[2]</sup>

### Feedback or Question \*

### Your Name

### Your Email Address

### CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

Controller

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**Source URL:** <https://www.cu.edu/controller/fin-how-adding-attachments>

**Links**

[1] <https://www.cu.edu/controller/fin-how-adding-attachments>

[2] <https://www.cu.edu/controller/forms/questions-feedback-0>