

FIN How-to: What Makes a Good Attachment ^[1]

Attachments provide supporting documentation both to your Approver now...and to an Auditor down the road.

A JE typically needs one or more attachments. There are several ways you can do this - [learn how to add attachments](#) ^[2].

Watch the video

Read the procedures

One of the great features in the Finance System is the ability to add online Attachments to Journal Entries. Your attachments can be PDFs, word documents, excel files, or other file types.

What makes a good attachment?

- Any document that prompted the JE ... was used as a basis to create the JE ... or provided the dollar amounts for the JE.
- Source documentation is best. That's the original, detailed documentation, like a supplier's invoice.

Good things to attach to your JE might be any or all of the following:

- That invoice you need to accrue for year-end ...
- The email that tells you about an error and how to correct it ...
- A CognosCognosThe Cognos Reporting System is our single university-wide reporting solution. Before you can use the Reporting System, you must be granted access to the Cognos m-Fin Reports. You log in to Cognos via your campus portal. ^[3]? report – like the m-Fin Operating Summary that shows resources are available ... or the m-Fin Financial Detail that shows the previous transaction you want to correct.

And remember a few more things:

- Be sure every attachment is legible!
- Don't highlight information. Draw circles or arrows, instead.
- Use the Long Description Long Description The Long Description is the business purpose of the journal entry. You have up to 254 characters to explain what the JE is meant to do and why the JE is needed. ^[3] field to explain why this JE is necessary!
- If you're correcting an error, explain how it occurred and – if more than 90 days have passed – why it took so long to make the correction. If you're hitting sponsored project funds, explain why the expense is appropriate to that award.
- If you're adding documentation to a saved journal, click Save again!

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 ^[4]

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

Source URL: <https://www.cu.edu/controller/fin-how-what-makes-good-attachment>

Links

[1] <https://www.cu.edu/controller/fin-how-what-makes-good-attachment> [2]

<https://www.cu.edu/controller/fin-how-adding-attachments> [3] <https://www.cu.edu/>

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