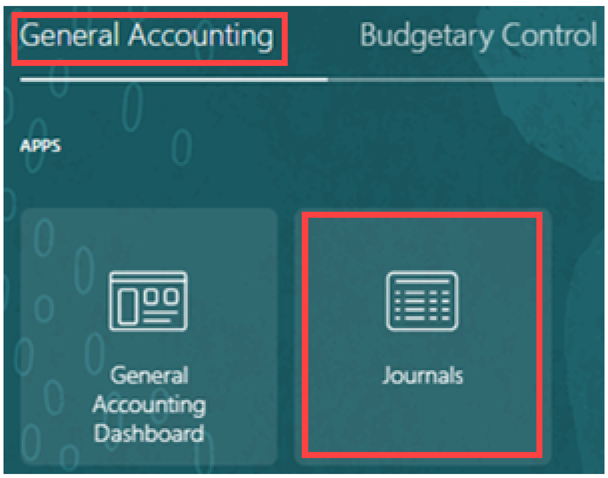
Attach a Backup Document to a Journal

In this topic you will learn how to attach a document to a journal. Attachments are required to serve as supporting documentation for the journal, e.g., EGPS invoice or a report to show a mischarged account.

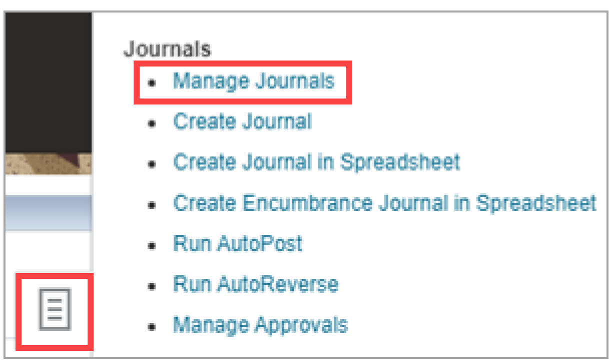
Image quality in this guide may vary across devices. If images are not clear, increase your viewing size.

Directions

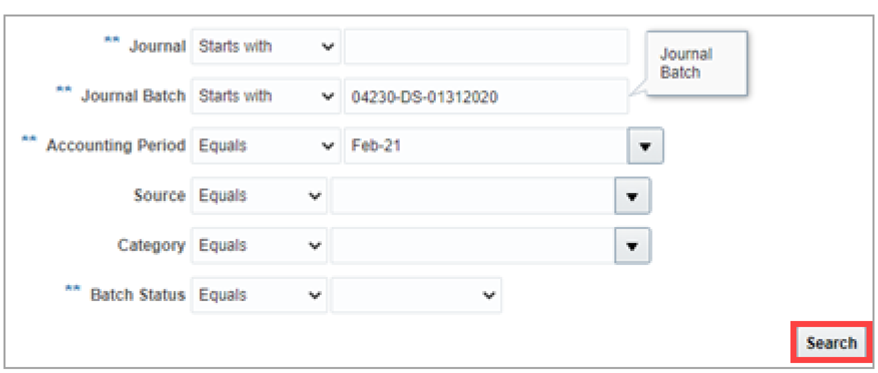
1. Scroll to the **General Accounting** menu and select the **Journals** tile.



2. Select the **Manage Journals** link within the **Tasks** menu on the right side of the page.



3. Enter search criteria, then click the **Search** button.



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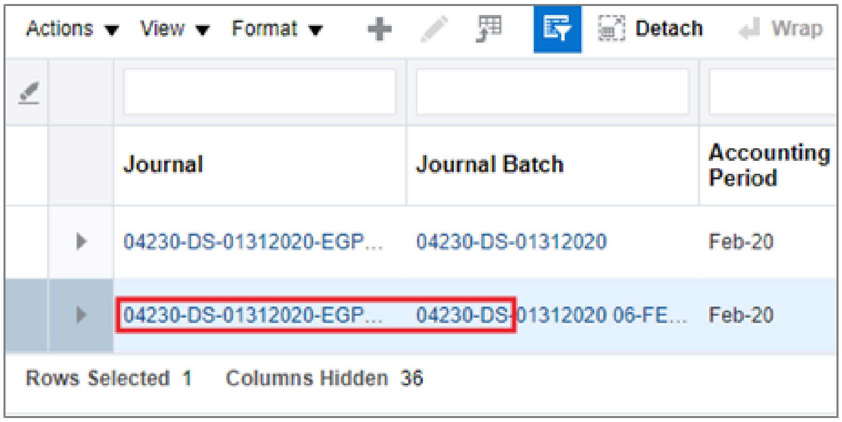
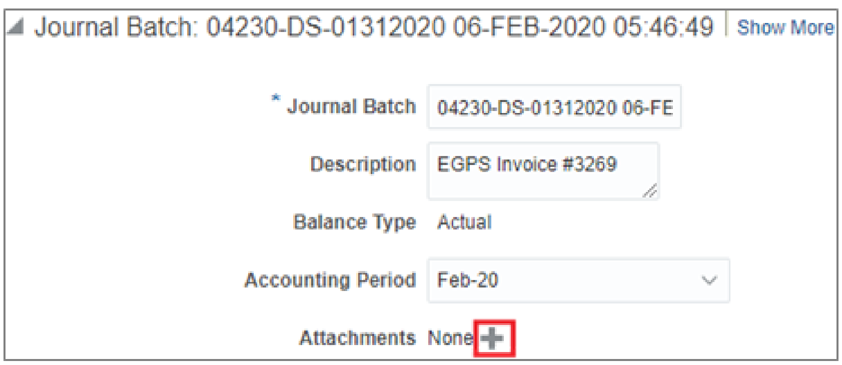
4. Click the **Journal Number**, e.g., 04230-DS-01312020-EGPS Invoice #3269.

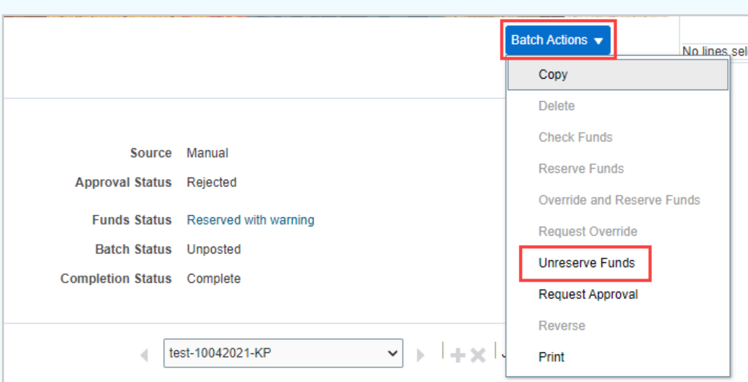


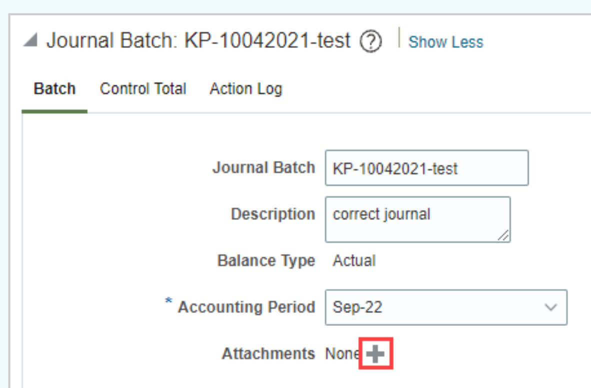
5. Click the + **Manage Attachments** icon.



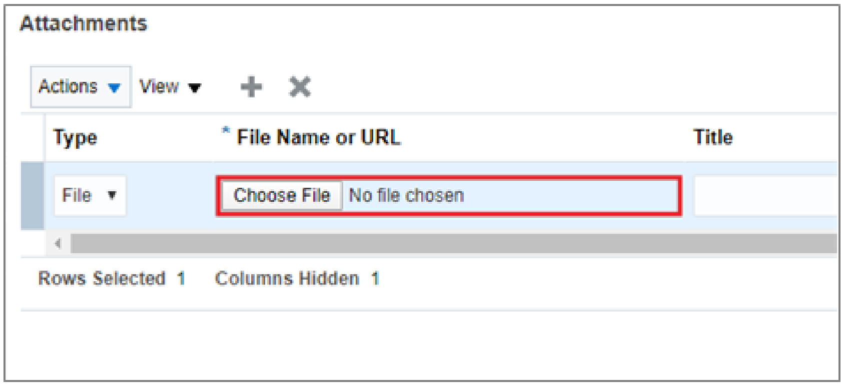
If you don't see the Attachments + icon to add an attachment, unreserve funds

If your journal Funds Status shows "Reserved," or, "Reserved with warning," you must first unreserve the funds before you can add an attachment and resubmit your journal. To do this, pull down the Batch Actions menu and select "Unreserve Funds." Once you do that, the + sign will appear next to the Attachments field.

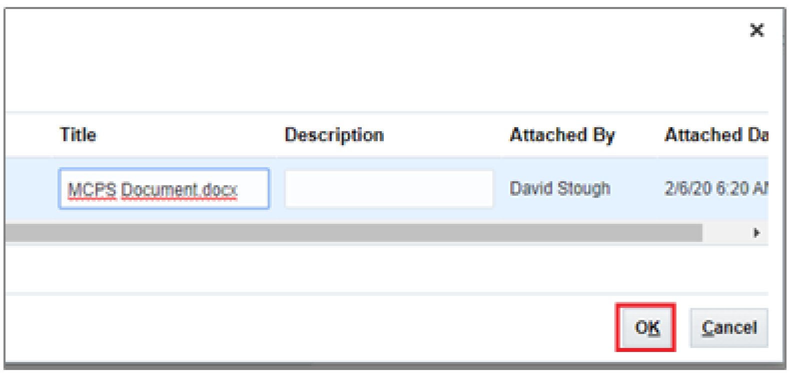




6. Click the **Choose File** button to select the saved document and click **Open** to add an attachment.



7. Once the document is attached, click the **OK** button.



8. Click the **Save and Close** button, or continue with the process to submit a journal for approval.

   Note: *If you are responding to a rejected journal and need to resubmit it, select "Reserve Funds" from the* ***Batch Actions*** *pull-down menu. Then, click on the "Post" button, and your journal will be resubmitted for approval.*

9. Click on the **Home** icon to return to the home page.

Note: *Your screen may differ from screenshots in these instructions, due to variations in user roles and system upgrades.*