New: Attachment Capabilities for the Non-Payroll Cost Transfer

Posted on April 5, 2018 by EBS Communications

Effective April 6, 2018 initiators and approvers of the Non-Payroll Cost Transfer (NPCT) transaction will have the capability to attach documentation during the creation process of a journal.

The first time you open the NPCT transaction the attachment icon will not appear until you have created, checked and submitted a journal. A Journal Transfer ID number must be created prior to adding an attachment. Here is an example of a completed Expense

NPCT:

Expe	nse Transfer		AIREIRE
	Expense Transfe	er	
1	Basic Data		

To attach a file, click on the right side of the Services for Object icon, then click create, then store business document to attach an Excel, PDF, TIF or Word document. Click on the document type you wish to attach.

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Another pop-up box will appear. Locate the file on your computer and click the Open icon.

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Another pop-up box will appear to add a Description to the file. Click on the green check mark to load the

file.	
File Description	
File Name	17046 AVC Report.XLSX
Description	Attachment for review
V X	

Once the file is uploaded, click the check mark to attach the file to the NPCT.



Attached documents will be available for the Department Approver to view in workflow or by users in the Display request of the

journal.			
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	Icon Title		Creator Name
	296763 NPCT		Mary Ellen Clancy
	Reason Code 03 Document Date 04/02/20 Service: Attachment list New & AttachmentFor0296763 Icon Title 296763 NPCT	Administrative El	Creator Name Mary Ellen Clancy

The Department Approver will bring up a journal in their inbox to approve or reject. A new button will appear for

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Clicking on the Attachment button will bring up the Services for Object icon 💯 🗎

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The Services for Object icon can be used to view any attached documents. Click on the icon **P**II then click on Attachment List, highlight the attachment and click the display icon to view

document.	

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			296763	NPCT	J			Mary Ellen Clar	псу

Important, if you do not exit out of the Non-Payroll Cost Transfer transaction completely prior to starting another journal, the Services for Object icon will still appear on the Journal Transfer Request page and the Journal Transfer Type you choose. It is very important that you do not attach any documents at this point (Example 1). All attachments must be done for a new journal type at the time it has been created, checked for errors and submitted for a journal transfer ID number (Example 2). This way the document attachment is assigned to the particular journal transfer ID number. Finally, when you create an attachment to the journal, a pop-up box will appear to choose the correct journal ID number for the attachment since the others may still be in memory (Example 3).

Example 1 – Any attachments at this point will not be assigned to a specific journal transfer ID number. This is

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Example 2 – The attachment document will now be assigned to journal 296803 only. This is the correct



Journal Transfer ID	296803		Submitted	for
Reason Code	09 No	n-Recurring Cost	Allocation, Intra-	Entit
Document Date	04/02/2018	Posting Date	04/02/2018	Po

Example 3

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For questions please contact Financial Research Compliance in Sponsored Projects Shared Services at <u>Compliance@jhu.edu</u>.