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:
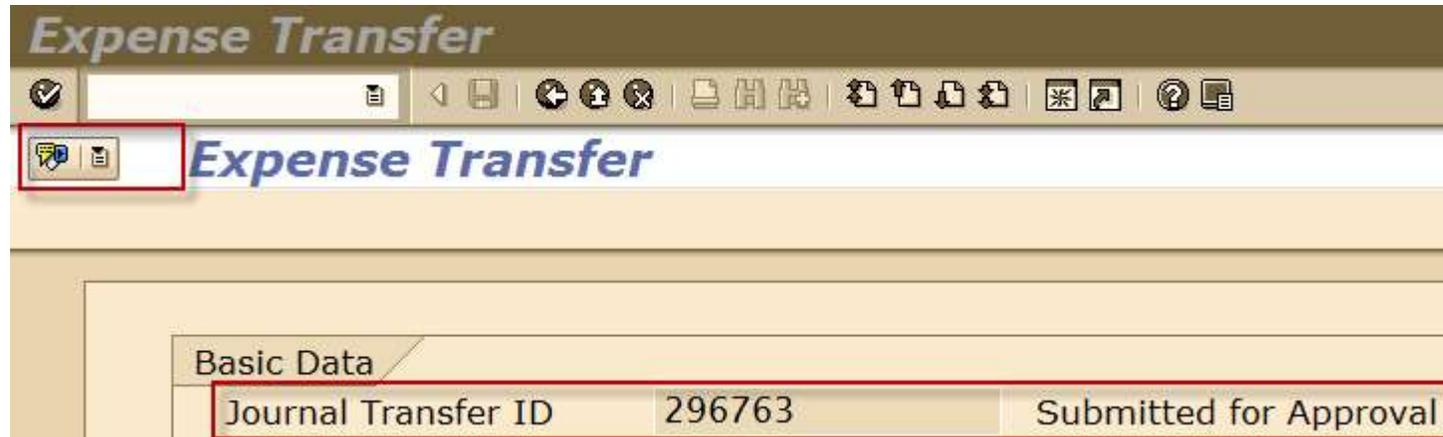
To attach a file, click on the right side of the Services for Object icon, then click create, then store business document to attach an Excel, PDF, TIF or Word document. Click on the document type you wish to attach.
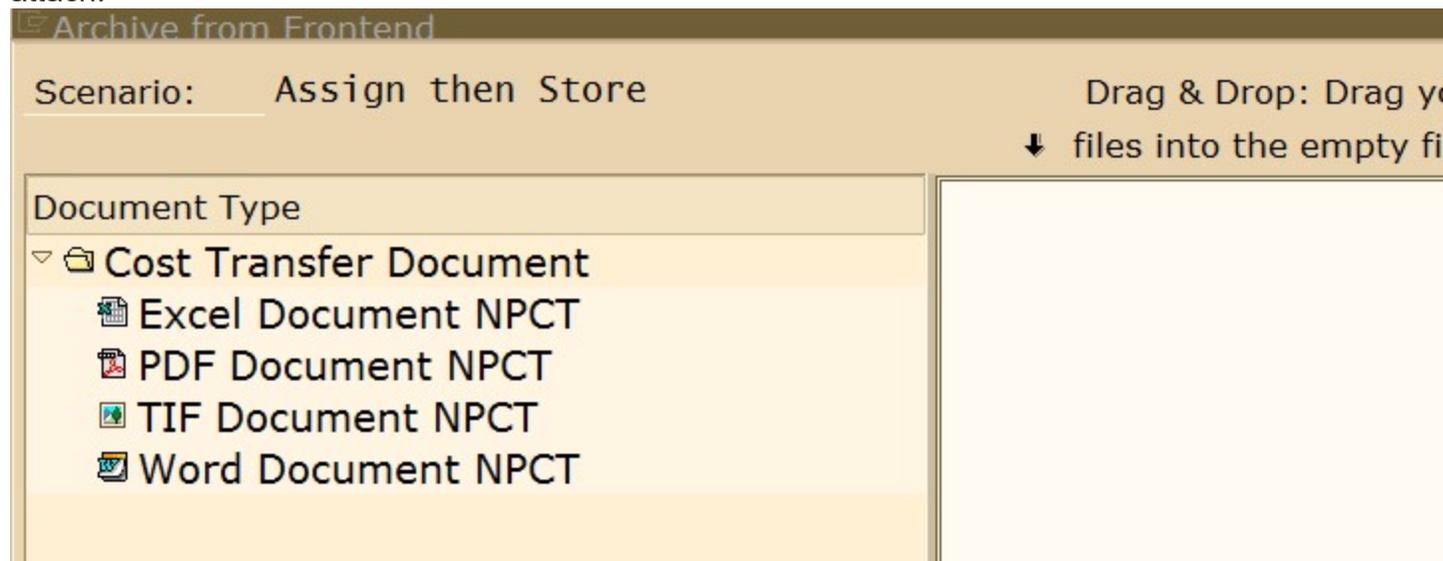
Another pop-up box will appear. Locate the file on your computer and click the Open icon.
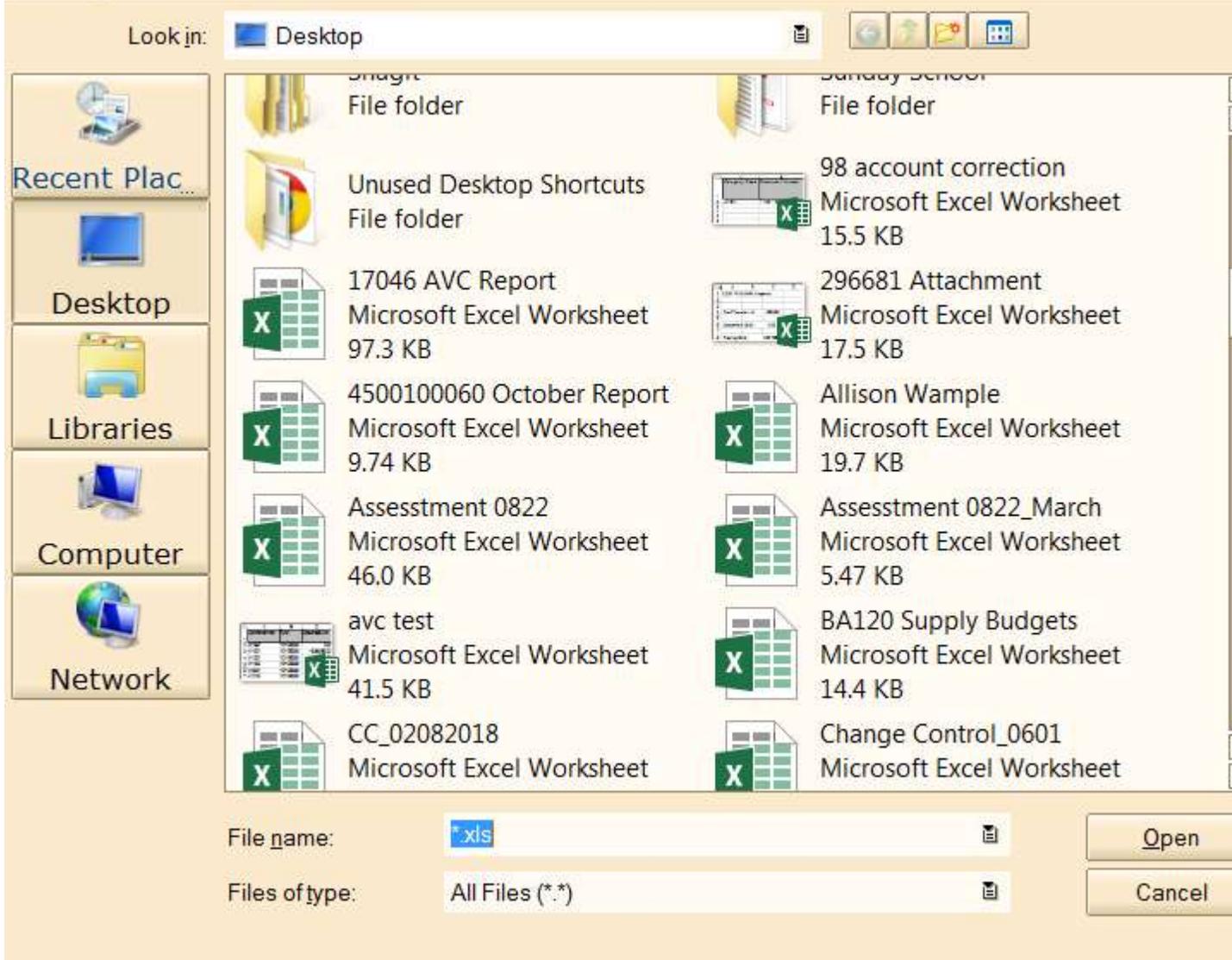
Another pop-up box will appear to add a Description to the file. Click on the green check mark to load the file.

| File Name | 17046 AVC Report.XLSX |
| Description | Attachment for review |
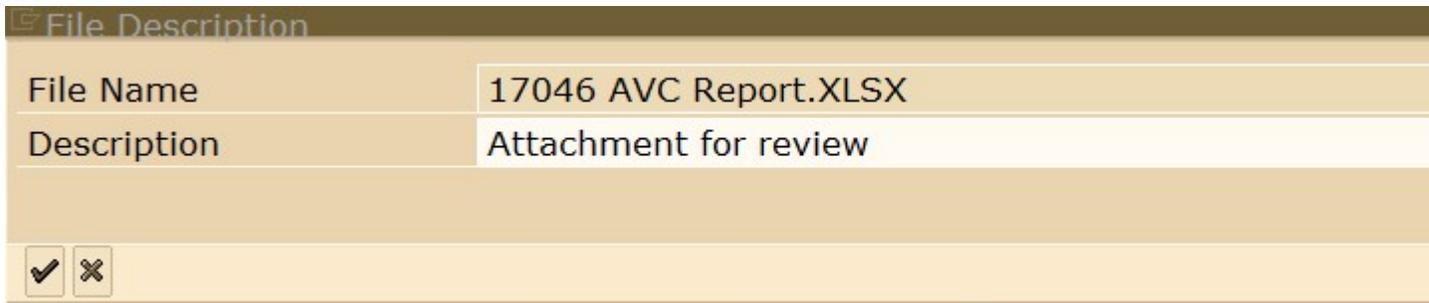
Once the file is uploaded, click the check mark to attach the file to the NPCT.

Archive from Frontend

Scenario: Assign then Store   Drag & Drop: Drag yo
                                                    ↓ files into the empty fi

Document Type   File Storage System:

▽ 🗁 Cost Transfer Document   C:\Users\mclancy1\Deskt
    📊 Excel Document NPCT
    📄 PDF Document NPCT   Number of Files:
    🖼 TIF Document NPCT
    📝 Word Document NPCT

◀ ▶

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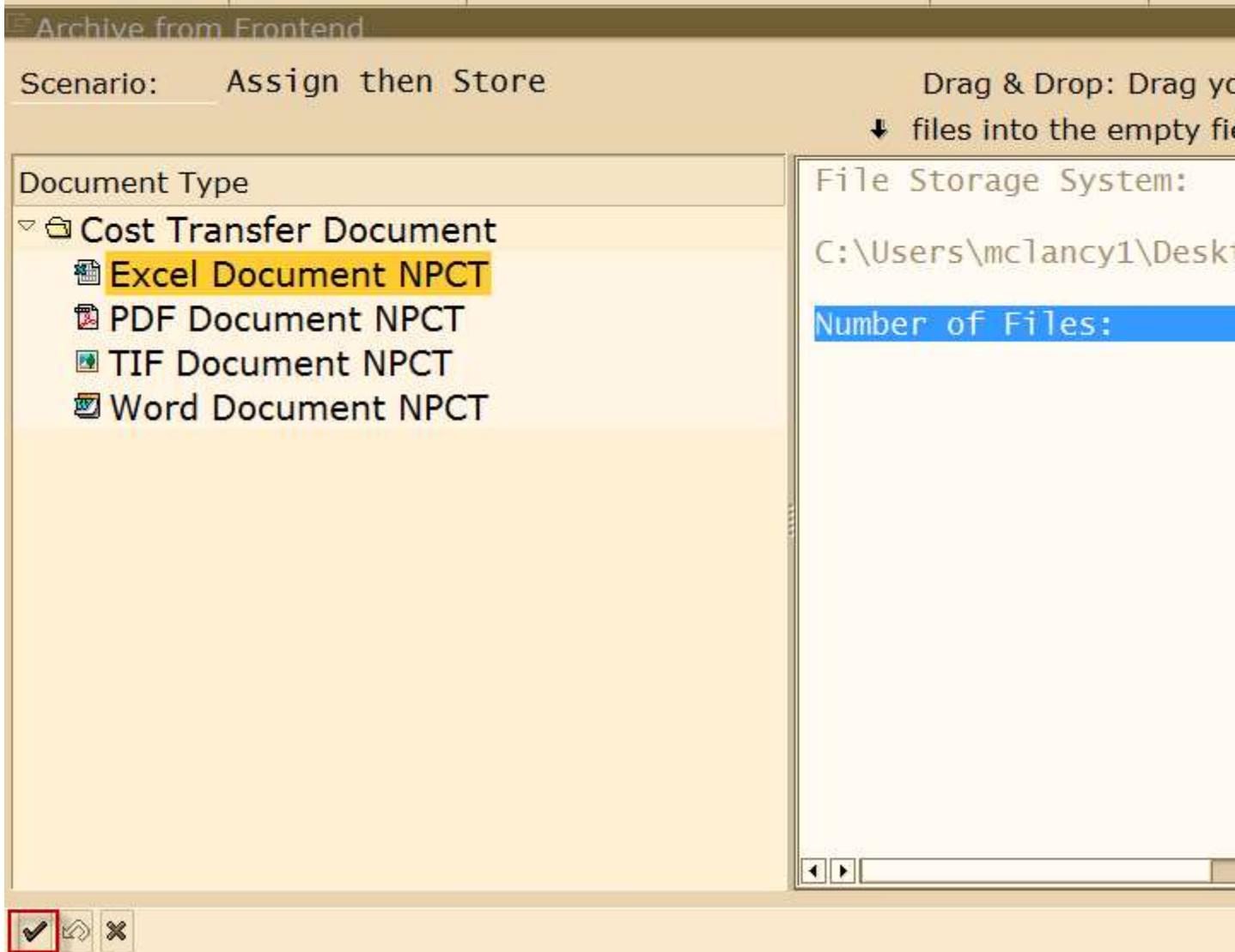
Attached documents will be available for the Department Approver to view in workflow or by users in the Display request of the

journal.

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

Attachment [Attachment] .

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

Expense Transfer

✏️ Approve   ✏️ Reject   🗂️ Attachment

Basic Data			
Journal Transfer ID	296763		Submitted for Approval
Reason Code	03	Administrative Error	
Document Date	04/02/2018	Posting Date	04/02/2018 Pos

The Services for Object icon can be used to view any attached documents. Click on the icon 📄 then click on Attachment List, highlight the attachment and click the display icon to view document.
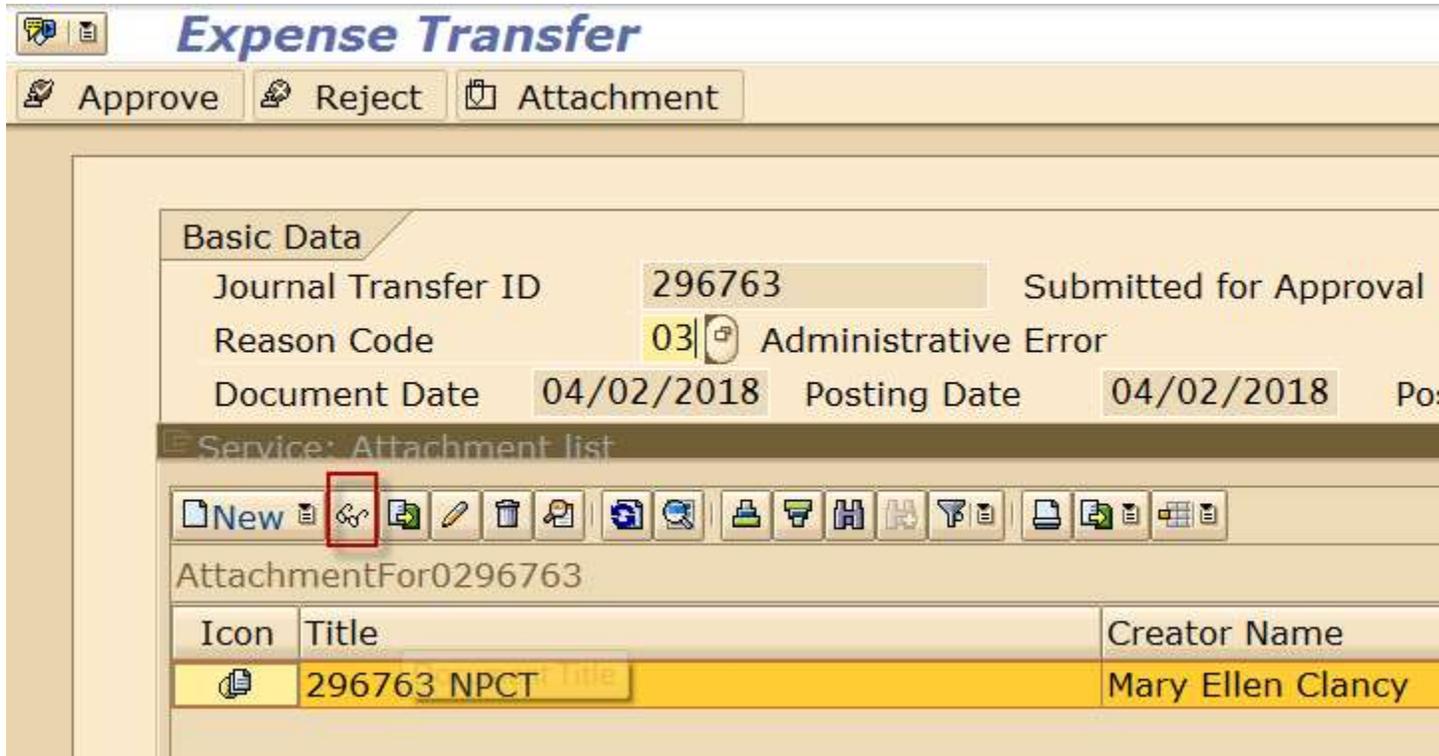
Expense Transfer

✏️ Approve   ✏️ Reject   🗂️ Attachment

Basic Data			
Journal Transfer ID	296763		Submitted for Approval
Reason Code	03	Administrative Error	
Document Date	04/02/2018	Posting Date	04/02/2018 Pos

Service: Attachment list

☐New 👓 📄 ✏️ 🗑️ 🔳 | 🔄 🔍 | 🖨️ 🔽 📂 📄 🔽 | 🖨️ 📄 ▦

AttachmentFor0296763

Icon	Title	Creator Name
📄	296763 NPCT	Mary Ellen Clancy

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
incorrect.

Example 2 – The attachment document will now be assigned to journal 296803 only. This is the correct
way.
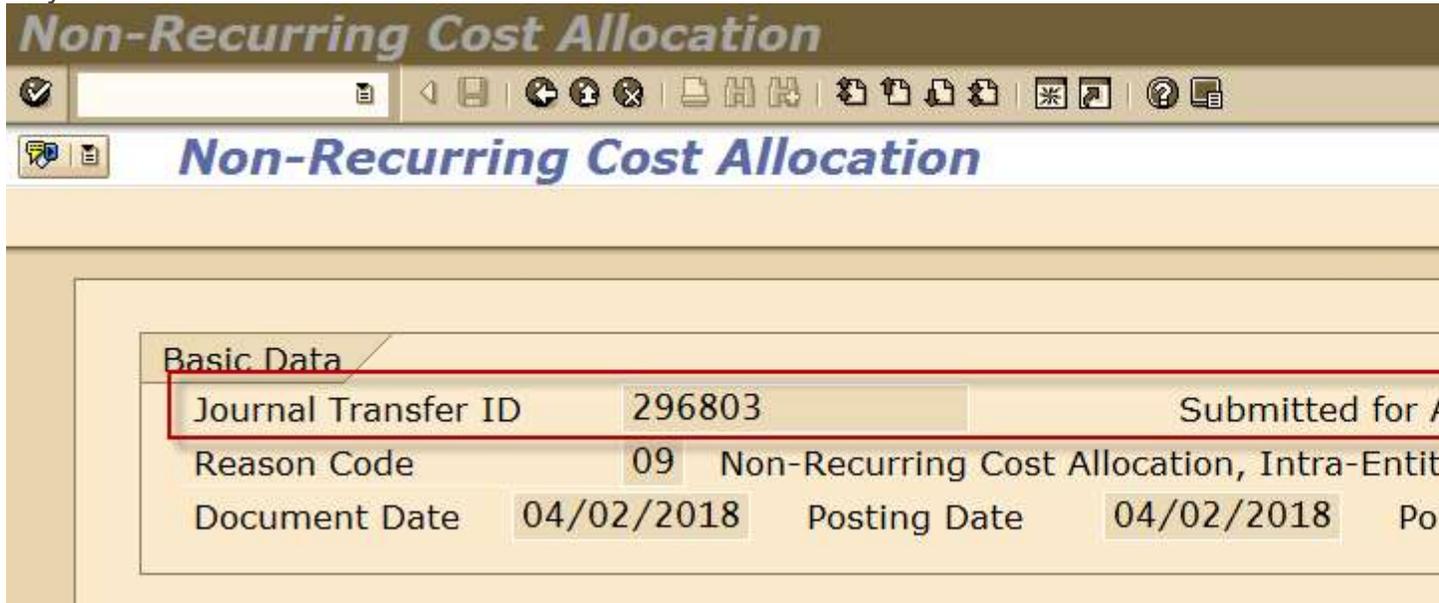
Example 3

Non-Recurring Cost Allocation

Basic Data

Journal Transfer ID	296765	Submitted for A
Reason Code	09 Non-Recurring Cost Allocation, Intra-Entit
Document Date	04/03/2018 Posting Date 04/03/2018 Po

	Sen. CostCtr	Sender Order	Sender WBS Element	Sender F
		80031449		131700

Choose an object

ⓘ To start the chosen function, choose an
application object and press 'Continue'.

Highlight the correc
NPCT number and cli
on the check mark
below.

	Object type	Object Name
	ZBO_COTRFR	0296764
	ZBO_COTRFR	0296765

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