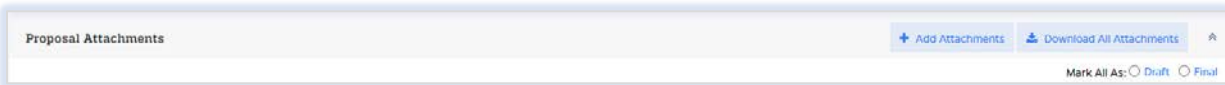


Attachments

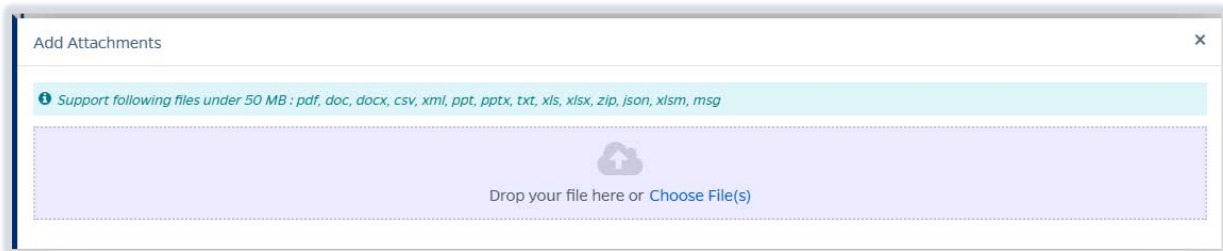


How do I add attachments to proposal records?

- ❑ Open a proposal by clicking on the **Proposal** tab.
- ❑ Click on the **Attachments** tab **Attachments** at the top of the screen.
- ❑ For general Proposal Attachments, click on the **+ Add Attachments** button.

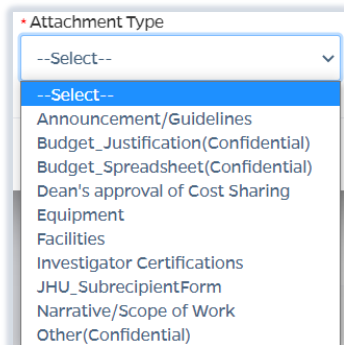


- ❑ The box below will open.
 - Click and drag your documents into this box. You can click on multiple attachments at one time and drop them all into the box at once.



— or —

- Click on **Choose File(s)** and click on each document to upload. Then click **open**. The user can highlight multiple files in the list that opens to upload multiple files at once.
- ❑ Choose the appropriate **Attachment Type** from the dropdown for each document uploaded.



Note: Attachment Types displaying as **Confidential** can only be seen by Department Administrators with access to the lead unit and the Research Administration Office.

- ❑ Enter a Description in the **Description field**. (Optional)

- ❑ Change the **Status field** from *Draft* to *Final* as appropriate using the dropdown menu.

- ❑ Click on the **Add** button.

- ❑ For **Personnel Attachments**, click on **+ Add Attachments**.

- ❑ The box below will open.

- Click and drag your documents into this box. You can click on multiple attachments at one time and drop them all into the box at once.

— or —

- Click on **Choose File(s)** and click on each document to upload. Then click **open**.






- ❑ Choose the appropriate **Person** from the dropdown menu for the document.

- ❑ Choose the appropriate **Attachment Type** from the dropdown for each document uploaded.

- Enter a Description in the **Description field**. (Optional)
- Change the **Status field** from *Draft* to *Final* as appropriate using the dropdown menu.
- Click on the **Add** button.

Once documents have been attached, they can be deleted and replaced. The user can also edit the Attachment type and Description for each document. The chart below describes the icons and actions for each icon.

Other Actions once attachments have been added:

	Edit the details.
	Delete the document.
	Download the document.
	Replace will insert a new version of the document chosen.
	The version icon will allow the user to see previous versions of the document one it has been replaced.