

Adding and Deleting Attachments

Purpose: Attaching documents is required for many tasks such as creating a pre-award applications.

Audience: All roles.

UPLOAD SPECIAL REQUIREMENT DOCUMENTS

The Letters of Support section does not have version control like the **Documents** section. Documents can only be deleted or uploaded in this section. All documents will display, rather than the latest version. Documents can be manually labelled with a version number (e.g., Facility Rental Agreement v2).

1. Click the **Folder** icon in the *Letters of Support* section to upload supporting documents (e.g., approvals, etc.). The Windows *File Explorer* window opens.

NOTE: *Letters of Support that have been added to the record can only be deleted for records that have a status of In Preparation. You can however, add subsequent versions of a document.*

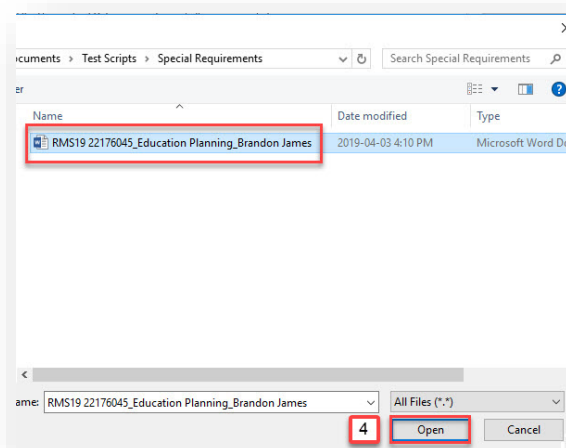


Figure 1: File Upload

2. Select a file to upload and click **Open** in the *File Explorer* window. The **File Type** and document **Name** display in the **Letters of Support** section.



TIP: *After saving the Pre-award record, the document upload date displays in the **Uploaded on** field.*


3. Enter a file description (e.g., signed approvals) into the **Letters of Support Description** field.
4. Click **Save**.

DOCUMENTS SECTION

The **Documents** section is where you will upload a copy of the application and other documents (e.g., agreements, signature pages).

To upload the funding application and other documents:

In order for a Pre-award/Application record to proceed through the approval stage a copy of the application must be uploaded.

1. Click the folder  icon in the **Documents** section. The Windows *File Explorer* window opens.
2. Select the application document and click **Open** in the *File Explorer* window.
See Figure 24: File Upload.
3. Select Application from the **Type** dropdown list.

NOTE: Documents that have been added to the record can only be deleted for records that have a status of *In Preparation*. You can however, add subsequent versions of a document.

4. Click **Save**. The date is populated into the **Uploaded on** field.

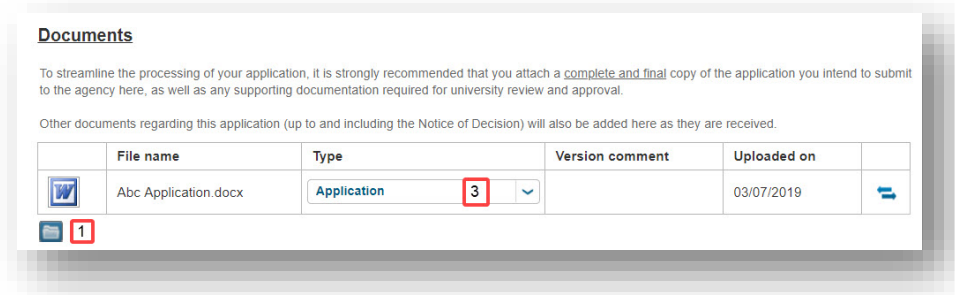


Figure 2: Documents Section

UPLOAD NEW DOCUMENT VERSION

The **Documents** section facilitates version control. All versions of a document are stored in the **Manage Version** archive.



Version control is not enabled until the record is saved with the first version.

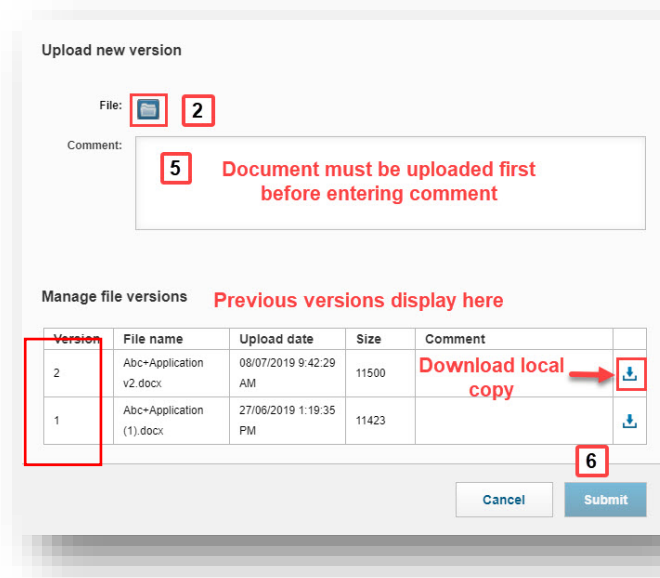
	File name	Type	Version comment	Uploaded on	
	Abc+Application v4.docx	Application	Amended budget figures included	08/07/2019	 
	Global Search Field.docx	Other			1 

Version control button displays after the record is initially saved.


Figure 3: Document Section Version Control

To upload a new version of an existing document in a Pre-award record:

1. Click the  icon. The *Upload New Version* window opens.
2. Click the  icon.
3. Select the file you wish to upload from the File Explorer.
4. Click **Open**.
5. Enter a **Comment** (optional) describing the document revision (e.g., budget amended).





Upload new version

File:  **2**

Comment: **5** Document must be uploaded first before entering comment


Manage file versions **Previous versions display here**

Version	File name	Upload date	Size	Comment
2	Abc+Application v2.docx	08/07/2019 9:42:29 AM	11500	Download local copy 
1	Abc+Application (1).docx	27/06/2019 1:19:35 PM	11423	

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Cancel Submit


Figure 4: Document File Versions

6. Click **Submit**. The latest version displays in the **Documents** section. Previous version are stored in the Manage Versions section which can be viewed by clicking the  icon.

DELETING DOCUMENTS

To delete a document in the Documents section for records with a status of In Preparation:

IMPORTANT NOTE: Where a document has multiple version, clicking **Delete** in the **Documents** section will delete all versions of a document. When a document is versioned, you would add a new version to maintain the document archive. Only use the  icon when the version control  icon is not displayed.

1. Click  icon beside the document you want to delete.
2. Click **Save**.

	File name	Type	Version comment	Uploaded on	
	Abc+Application v4.docx	Application	Amended budget figures included	08/07/2019	 
	Global Search Field.docx	Other			1 



Clicking the  icon when the  icon is displayed will delete all versions

Figure 5: Delete Document