



Add or Delete an Attachment on a Project

Use these instructions to attach or delete a free form note on a project. An attachment may document requirements or information that is unique to a project.

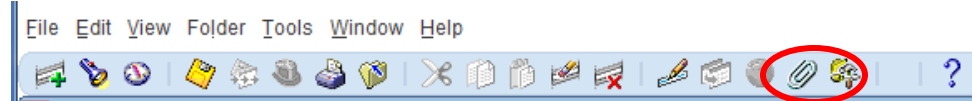
Prerequisites

- You must have one of the following responsibilities to add or delete an attachment on a project:
 - ORG Account Establishment Specialist
 - ORG Account Establishment Specialist with Budget Approval
 - ORG Account Establishment Administrator
- The project must exist in the Oracle business system.
- The Project Number must be known.

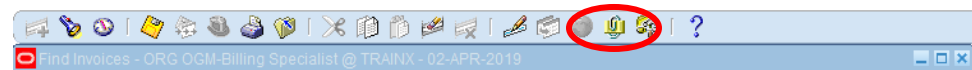
To add another attachment to a project:

1. Navigate to **Projects > Find Projects**, click **Open** to open the **Find Projects** form.

Note: The toolbar attachment icon, a picture of a paper clip, indicates the attachment feature is enabled. The icon displays as a paper clip holding a paper when the current record has at least one attachment.

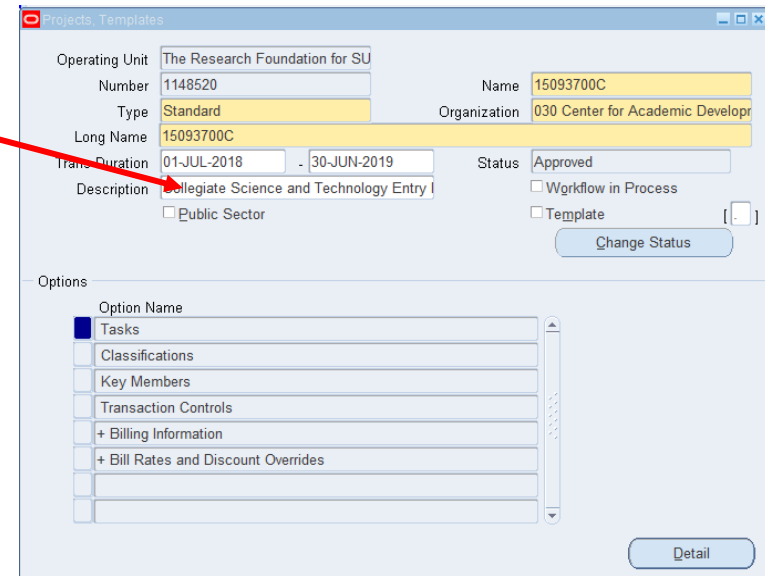


2. If a project already has an attachment, open the existing the attachment and add to it. Multiple attachments to a project can be accomplished in the same **Attachments** form.



Attachments are printed when the report, **RF Project Abstract**, is printed for a project.

3. Enter the **Project Number**, click **Open**.
4. Click in any field above the Options region. This step ensures that the attachments are tied to the selected project.
5. Perform one of the following steps:
 - If the Project has an existing attachment, the icon appears as a paper clip holding paper. **Note:** If a record already has an attachment, you can open the existing attachment and add to it. Multiple attachments to a Project should be accomplished in the same Attachments form.



The screenshot shows a web form titled "Projects: Templates". It contains several input fields and checkboxes. A red arrow points from the text in step 4 to the "Description" field. The form fields include:

- Operating Unit: The Research Foundation for SU
- Number: 1148520
- Name: 15093700C
- Type: Standard
- Organization: 030 Center for Academic Developr
- Long Name: 15093700C
- Trans. Duration: 01-JUL-2018 - 30-JUN-2019
- Status: Approved
- Description: Collegiate Science and Technology Entry I
- Public Sector:
- Workflow in Process:
- Template:

Below these fields is an "Options" section with a list of checkboxes:

- Tasks:
- Classifications:
- Key Members:
- Transaction Controls:
- + Billing Information:
- + Bill Rates and Discount Overrides:

Buttons for "Change Status" and "Detail" are also visible.

- Click the **Attachments** paper clip icon on the toolbar to open the Attachments form.
- Click in the **next available line** of the multi-line attachment block.
- Enter the following fields:

Category. Choose **Miscellaneous** from the List of Values.

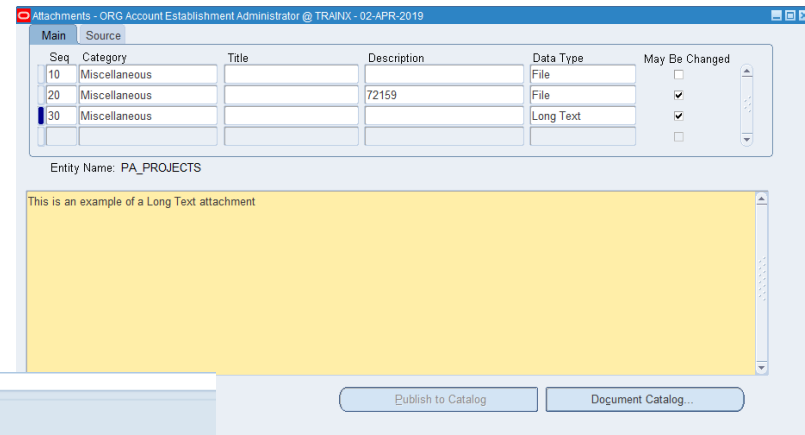
Description. Enter the **award number** associated with the **Project** abstract notes. The award number entered in this field determines project notes that will print on the abstract.


Data Type. Choose from File, Short Note, Long Note, Web Page. **Note:** When the **May Be Changed** check box is checked, the attachment may be edited by other users.

6. Enter the text of your attachment in the document block.
7. Select **File > Save**.

To attach a new file, select File in the Data Type field. A new Browser window displays.

1. Click **Browse** to find and select the file. **Note:** A message will appear at the bottom of the window indicating your file was uploaded successfully.



 **Confirmation**

1. File upload completed successfully.
2. * Please close the web browser.
3. * Return to the Attachments form and click the Yes button to indicate file upload is complete.

2. Select **File > Save**.

To Delete an existing attachment, click on the sequence number of the attachment to delete.

1. Select **Edit > Delete Record**.
2. Click **OK** on the Decision Window delete both the document and the attachment.
3. Select **File > Save** to save your changes.

