



Create Standard or Template Attachments

Use these instructions to create standard or template attachments for recurring sponsor terms.

Standard attachments: Use when you want to attach **non-editable** recurring notes to an award. Once attached to an award, the text from a standard attachment cannot be edited. Revisions made to the text on the original standard attachment will automatically update on all awards in which the standard attachment has been added to.

Template attachments: Use when you want to attach **editable** recurring notes to an award. Once attached to an award, the text from a template attachment can be edited as needed. Revisions to the text on the original template attachment will not automatically update on all awards in which the template attachment has been added to.

Prerequisites

- You must have one of the following responsibilities to create standard or template attachments:
 - ORG Standard Attachments

To create standard or template attachments:

1. Navigate to **Attachments > Documents- Standard Attachments** form.
2. Enter **Miscellaneous** in the **Category** field.
3. In the **Description** field, enter the name of the standard attachment (**always** begin with the three-digit location).
4. In the **Source** section, click **Data Type** and select **Long Text** from the **list** of values.

5. In the **Usage** section, choose Standard or Template.
6. In the **Security** section, choose None for Type.
7. In the **Effective Dates** section, enter a Start date (required) and an End date (Optional).
8. In the **Source** section, click **Data Type** and select **Long Text** from the list of values.
9. In the **Usage** section, perform one of the following:
10. In the **Security** section, enter the following fields:
11. In the **Effective Dates** section, enter the following fields:
12. Click in the text area to enter the attachment content.
13. Select **File > Save** to save your changes.
14. Select **File > Close Form**.