AR Attachments in the Grants and Accounts Receivable Modules

Use these instructions to attach manual invoices, sponsor specific invoicing forms, notes or a Web page in the grants management and account receivable (AR) modules. This will ensure we have permanent backup in our business applications.

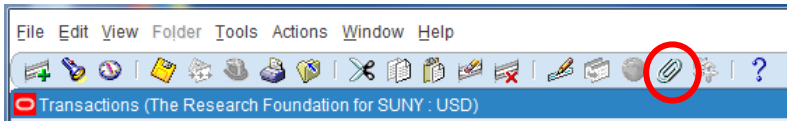
Prerequisites

You must have one of the following responsibilities to attach documentation in the Grants and AR modules:

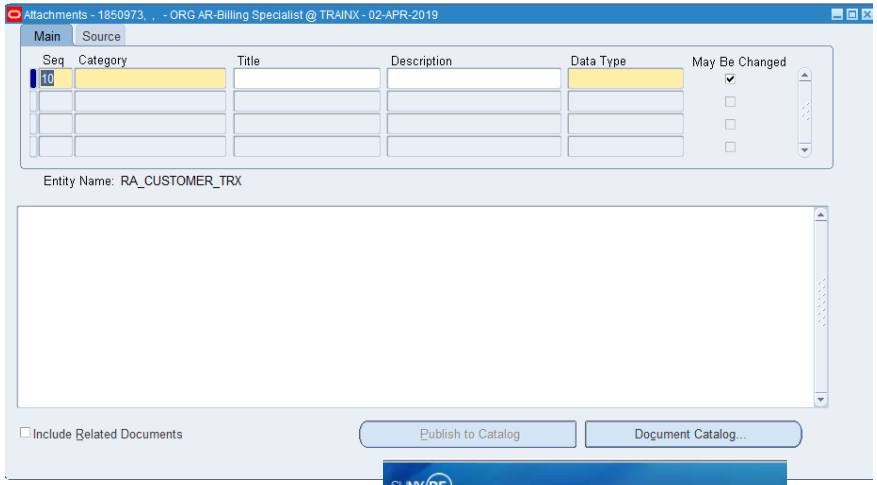
- Grants Module: ORG OGM Billing Specialist
- Accounts Receivable Module: ORG AR Billing Specialist

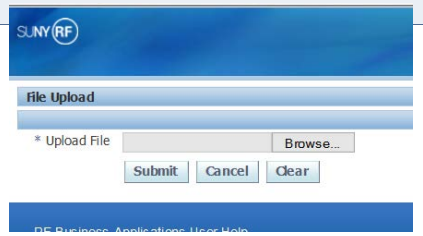
To Attach Backup Documentation in the Grants and AR Modules:

1. Navigate to the screen to which you want to attach your document, e.g., **Invoice Summary** form, **Transactions** form or any form within the business applications in which the paper clip icon on the toolbar is available.
2. Click the paper clip icon on the toolbar.

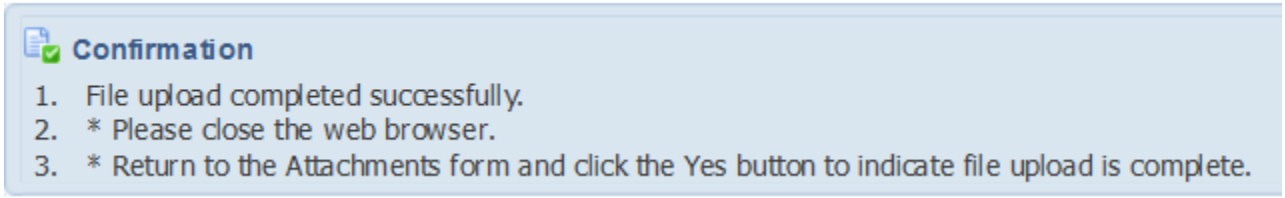


3. Enter the following fields on the Attachments form:
   - Category (Select **Miscellaneous** from the List of Values.)
   - Data Type
     - **File** (A window will automatically appear to upload a file.)
     - **Long Text** (Selecting **Long Text** from the List of Values enables more than 2000 characters of text to be stored.)
     - **Short Text**
     - **Web Page**
4. To attach a **File:**
   - Select **File** in the Data Type field. A new **Browser** window displays.
   - Click **Browse** to find and select the file.

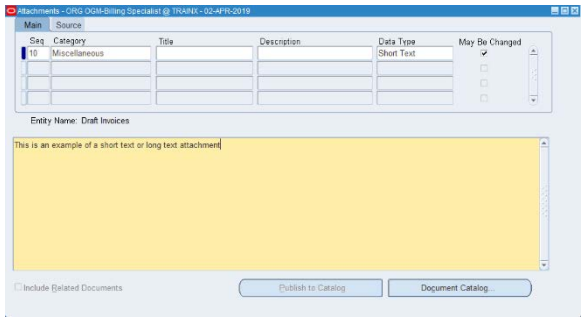


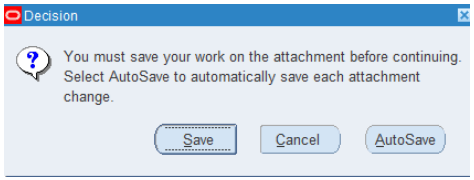


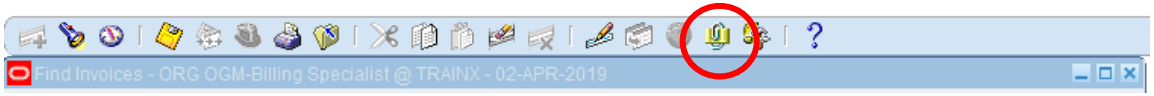
Note: A message will appear at the bottom of the window indicating your file was uploaded successfully.



5. To add a **note:**
   - Select **Long** Text or **Short Text** in the Data Type field.
   - Click in the yellow box that appears on the bottom of the form and type in your note.
   - Enter a **Title/Description** in the Title and Description fields.
   - Click on Document **Catalog**
   - Click **Save/AutoSave** in the Decision box.





6. To add a Web **page:**
   - Click the **Source** tab on the Attachments form.
   - Type in the URL for the Web page.
   - Select **File > Save**.
   - Click **Yes** in the decision form that asks if your file was uploaded successfully.
   - Click Open **Document** to review the file or Web page you attached.
   - Select File **> Save**.
7. Select **File > Close Form**.

After saving an attachment, the icon on the toolbar changes to indicate an attachment is available.