



QUICK REFERENCE GUIDE:

Saving and Deleting Attachments

Background:

Attachments provide an easy way to integrate outside information. Attachments are accessible by clicking the action menu. The Attachments Overview component contains a list of rows for all the files that have been attached to the entity by the user.

Navigation:

To Add an Attachment

Project Summary

Project Summary

▼ Project: HSHWY00018 - GLENN/RICHARDSON HIGHWAY RIGHT OF ... Save ?

Proposal:

General Project ID* HSHWY00018

Boroughs

Regions Federal Project Number (if none, leave blank)

Points

Road Segments and Bridges Project Name* GLENN/RICHARDSON HIGHWAY RIGHT OF ...

Airports

Actions

- Copy
- Tasks
- Check Out Project To Estimator
- Create Proposal
- Export Project To Estimator
- Validate Project
- Views
- Attachments (0)

1. Navigate to the component area to which you would want to attach the file.
2. Click the arrow in the upper left hand of the component actions menu to expand the menu.
3. Select **Attachments**. The Attachments Overview component will appear.

4. Click **Select File**.
5. Locate and chose the file to attach.
6. Click **Open**.
7. In the **Description** field, type a description for the attachment.
8. Click **Save**.

To Delete an Attachment

1. Navigate to the component to which should be deleted.
2. Click the arrow in the upper left hand of the **Component Actions Menu** to expand the menu.
3. Select **Attachments**. The Attachments Overview component will appear.
4. In the Attachments Overview component, expand the **Row Action Menu** for the attachment needing to be deleted.
5. Select **Delete**.
6. Click **Save**.

Notes: Attachments cannot be added to agency views. The attachment must be attached on the Item Posting, Contract, Sample, or area the Agency View is run on.

If you need further assistance please contact your Module Admin
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