

Working with Documents

This procedure details how to:

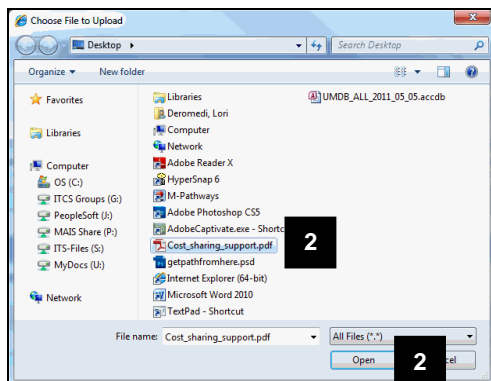
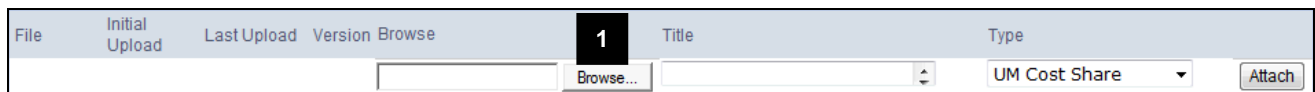
- **Attach:** Browse and attach documents right from the PAF Worksheet.
- **Upload New Version:** Upload a new version of a document and keep a version history (keeps previous documents).
- **View Version History:** View past versions of documents and revert to previous versions if needed.
- **Delete:** Remove a document. Does not keep any version history.
- **Manage Document Security:** Restrict specified personnel from viewing the document.

Important Information

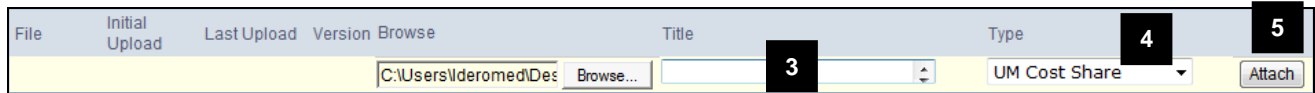
- No limit on the number of documents that can be attached.
- Each document cannot be larger than 150MB.
- Documents can be any file type (e.g., .ppt, .xls, .pdf, .doc).
 - The person viewing the document must have the correct program to view your attachments. For example, if someone does not have Microsoft Project he/she cannot view MS Project files (.mpp).
 - Consider uploading a lower version of file types to ensure everyone can view your document, e.g., upload .doc instead of .docx.
- Mac users: make sure you turn on file extensions. Any file uploaded without an extension (e.g., doc) cannot be viewed by others.

ATTACH DOCUMENT

Use to browse and upload/attach documents within the PAF Worksheet.



1. Click **Browse** to locate the document on your computer.
2. Select the file to upload and click **Open**.



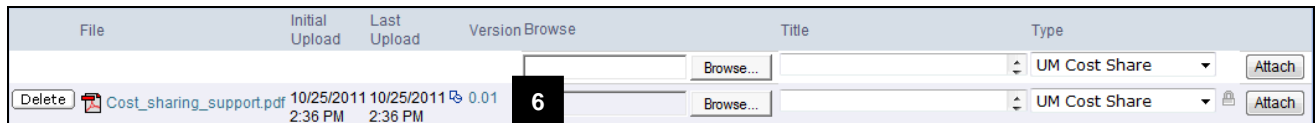
3. Optional, enter a title for the document.

4. Select or verify the document **Type**.

Note: When uploading Internal Documents you have a choice of different document types. Otherwise the Type matches the section you are completing. E.g., UM Cost Share is associated with documents attached in the UM Cost Sharing Section.

5. Click **Attach**.

Important! Your document is not uploaded/attached unless you click attach.

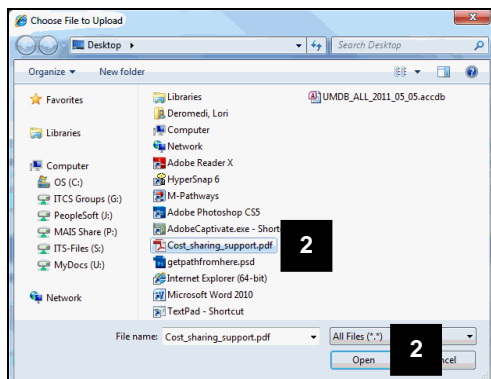
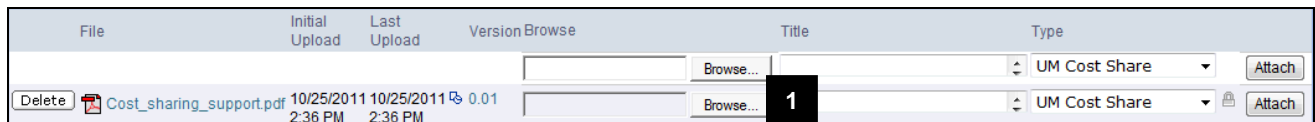


6. Your document is attached and appears as Version **0.01**.

Note: You can change a document property (Title, Type) at any time, i.e., before or after you attach the document. The change is saved when you **Save** the page or click **Continue** to move to the next page.

UPLOAD NEW VERSION OF A DOCUMENT

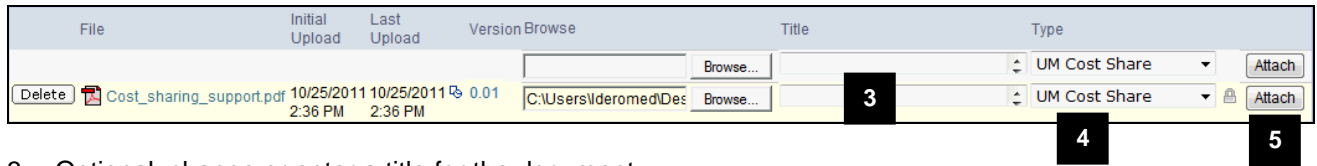
Use to replace a document with a new version and keep a version history (keeps older versions for later reference).



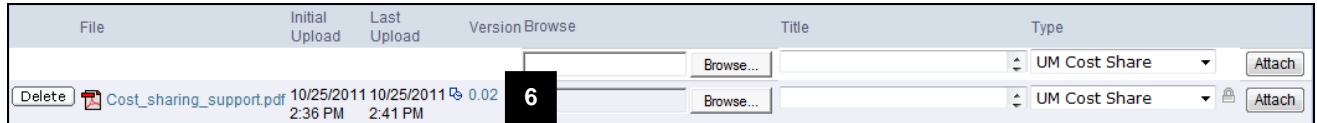
1. Click **Browse** to locate the new version of the document that has already been attached/uploaded.

Tip: When uploading a new version, make sure you are on the line for the current document and not on the blank line.

2. Select the file to upload and click **Open**.



3. Optional, change or enter a title for the document.
4. Verify the document **Type**.
5. Click **Attach**.

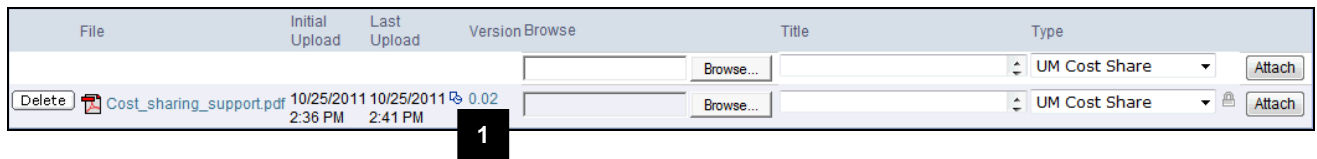



6. Verify the **Version** number change and the **Last Upload** date/time.

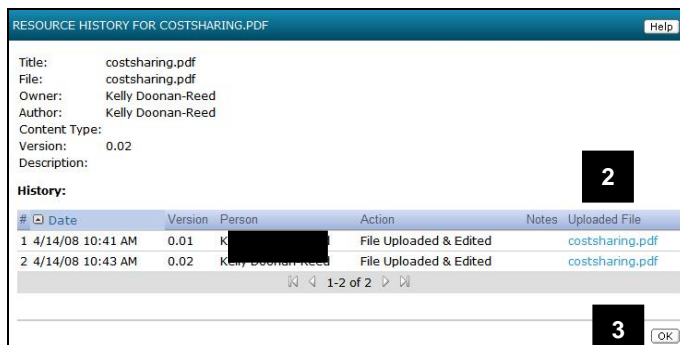
A version number increase (e.g., change from version 0.01 to 0.02) signifies that you have attached a new version of the document. Similarly, if the Last Upload date and/or time differs from the Initial Upload date/time, it signifies that a new version of the document has been attached.

VIEW DOCUMENT VERSION HISTORY

Use to view past versions of edited documents and revert to previous versions if needed.



1. Click the version number (e.g., 0.02) or  **View Revision History**.



2. Click the applicable link in the **Uploaded File** column to view a particular version of the file.


Notes:

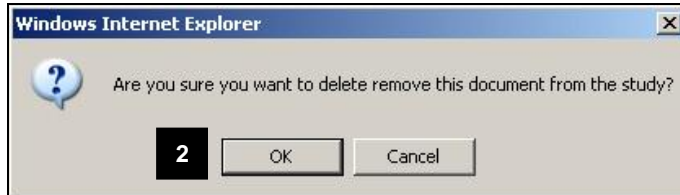
- Each version of the document is listed on its own line.
- To revert to an earlier version of a document:
 - Save the document
 - Upload the document (follow the directions to Upload a New Version of a Document).

3. Click **OK** to return to the previous page.

DELETE DOCUMENT

Use to delete a document, including all version history.

File	Initial Upload	Last Upload	Version Browse	Title	Type
 1 Cost_sharing_support.pdf	10/25/2011 2:36 PM	10/25/2011 2:41 PM	<input type="text"/> Browse...	<input type="text"/> Browse...	UM Cost Share <input type="button" value="Attach"/>





1. Click **Delete**.
2. Click **OK** to warning.
3. The document and all previous versions are permanently deleted.

File	Initial Upload	Last Upload	Version Browse	Title	Type
3			<input type="text"/> Browse...	<input type="text"/> Browse...	UM Cost Share <input type="button" value="Attach"/>

MANAGE DOCUMENT SECURITY

Use to restrict specific personnel from viewing a document attached to a PAF. Any document that is restricted will not be visible to the restricted personnel.

You cannot restrict access for UM or Sponsor Principal Investigators (PIs) or the Primary Research Administrator.

File	Initial Upload	Last Upload	Version Browse	Title	Type
  Cost_sharing_support.pdf	10/25/2011 2:36 PM	10/25/2011 2:41 PM	<input type="text"/> Browse...	<input type="text"/> Browse...	UM Cost Share <input type="button" value="Attach"/>

1. Click the  padlock.


Note: When the  padlock is grey, security has NOT been set on the document.

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2. Click the box in front of any name to uncheck the box and restrict access to the document.
Note: A greyed out (inactive) checkbox indicates that you cannot restrict document access for:
 - UM Principal Investigators
 - Sponsor Principal Investigators
 - Primary Administrative Contact
 - Primary Post-Award Contact
 - Reviewers for the PAF
3. Click **Submit**.

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4. Document security has been added, as indicated by the gold padlock .