

Working with Documents

This procedure details how to:

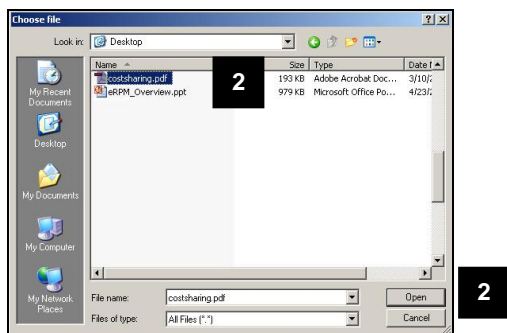
- **Attach:** Browse and attach documents right from the PAF Worksheet.
- **Upload New Version:** Upload a new version of a document and keep a version history (keeps previous documents).
- **View Version History:** View past versions of documents and revert to previous versions if needed.
- **Delete:**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

Important Information

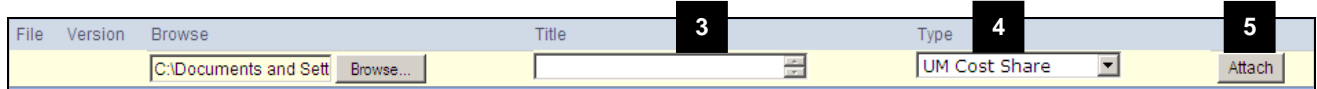
- No limit on the number of documents that can be attached.
- Each document cannot be larger than 150MB.
- Documents can be any file type (e.g., .ppt, .xls, .pdf, .doc).
 - The person viewing the document must have the correct program to view your attachments. For example, if someone does not have Microsoft 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**.



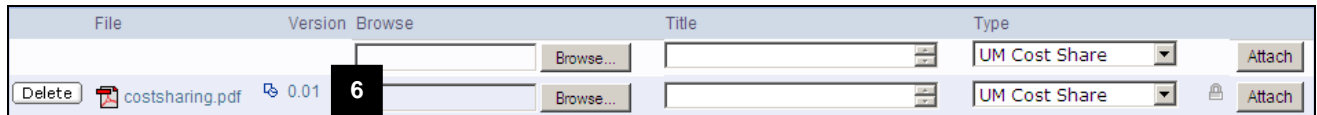
3. Optional, enter a title for the document.

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

Note: Only when uploading Internal Documents will you have a choice of different document types. Otherwise Type matches the section you are completing. E.g., UM Cost Sharing 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.



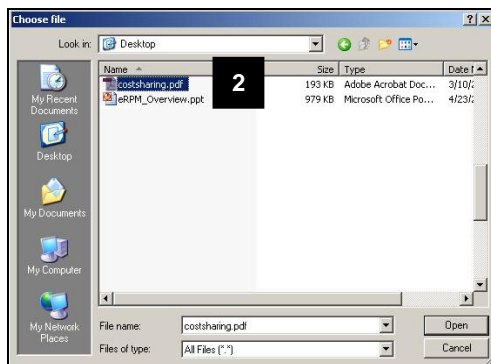
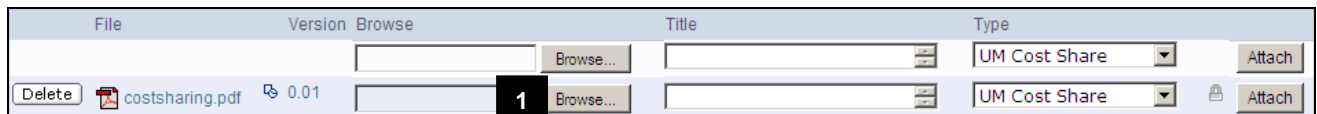
6. Your document is attached and appears as Version **0.01**.

Note: You can change the document title at any time, i.e., before or after you attach the document.

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)
- Modify document properties (e.g., title)



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

Tip: Make sure you are on the line for the current document and not the blank line to attach a new document.

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

File	Version	Browse	Title	Type
<input type="button" value="Delete"/>	costsharing.pdf	<input type="text" value="0.01"/>	<input type="text"/>	UM Cost Share <input type="button" value="Attach"/>
		<input type="button" value="Browse..."/>	<input type="text"/>	UM Cost Share <input type="button" value="Attach"/>

3. Optional, change the title or enter a title for the document.

4. Verify the document **Type**.

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

5. Click **Attach**.

File	Version	Browse	Title	Type
<input type="button" value="Delete"/>	costsharing.pdf	<input type="text" value="0.02"/>	<input type="text"/>	UM Cost Share <input type="button" value="Attach"/>
		<input type="button" value="Browse..."/>	<input type="text"/>	UM Cost Share <input type="button" value="Attach"/>

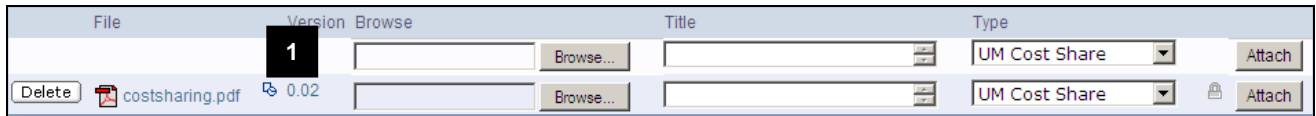
7. Verify the version number change.


A version number increase signifies that you have attached a new version of the document. (e.g., change from version 0.01 to 0.02)

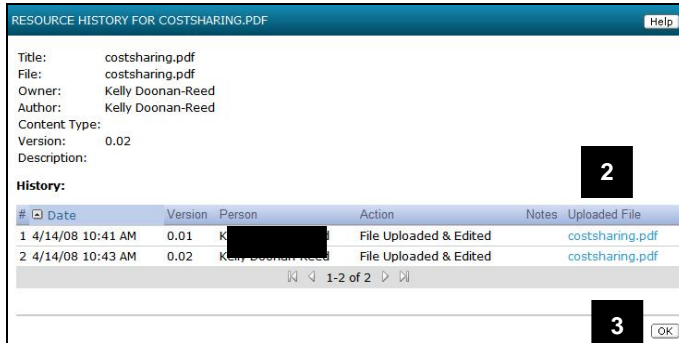
Note: If you only need to change a document property (Title, Type), you can make the change in the appropriate field. The change will be saved when you **Save** the page or click **Continue** to save and move to the next page.

VIEW DOCUMENT VERSION HISTORY

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



1. Click version number (e.g., 0.02) or  **View Version History** button.



2. Click **Uploaded File** to view different versions of the file.

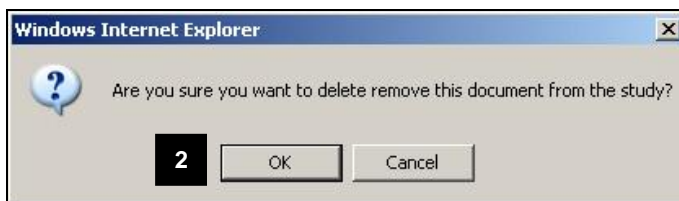
Notes:

- Each version of the document is listed on its own line.
- If you want 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).

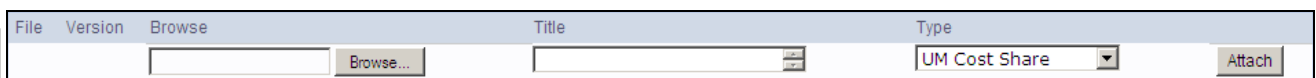
3. Click **OK** to return to the previous page.

DELETE DOCUMENT

Use to delete a document. Does not keep any version history.

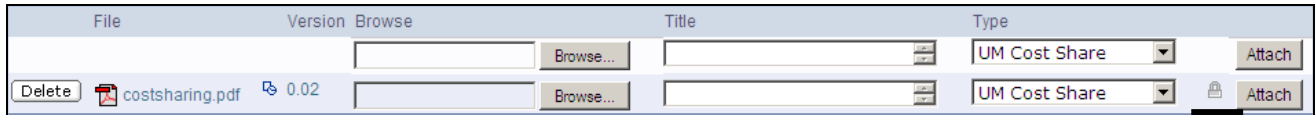


1. Click **Delete**.
2. Click **OK** to warning.
3. The document and all previous versions are permanently deleted.



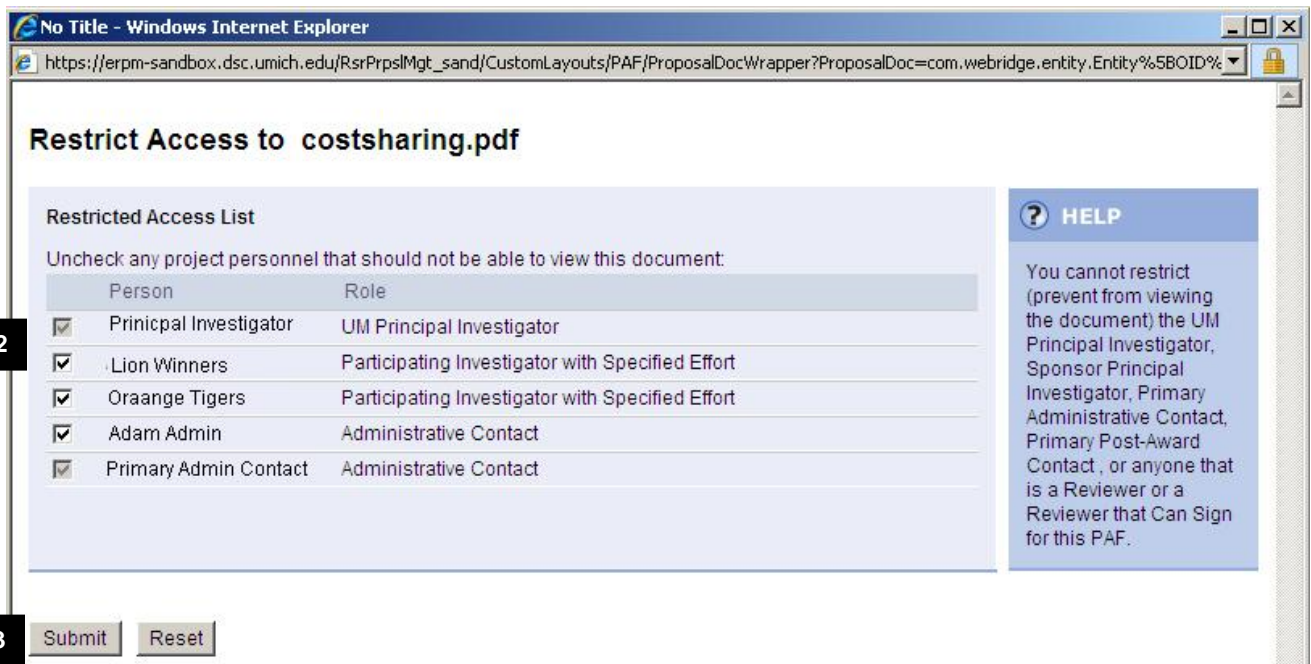
MANAGE DOCUMENT SECURITY

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.



1. Click the padlock.

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



2. Click the box in front of any name to uncheck the box and restrict access to the document.

Note: The box will appear greyed out for some people because 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**.

4. Document security has been added and the padlock by the document is now gold .

