

## IACUC: UPDATING THE NOTES & ATTACHMENTS TAB

The **Notes & Attachments** tab allows you to attach a number of different supporting documents to your protocol for review.

1) The attachment form includes a number of fields outlined in detail below.

▼ Protocol Attachments (0)

The Contact Name, Email, and Phone fields are used to indicate a point of contact for a attached document if that point of contact differs from the person uploading the document. The document uploader's name is captured automatically, so if you are the point of contact for the document, these fields can be left blank.

Add Protocol Attachment
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<p>* Attachment Type : <input type="text" value="select"/></p> <p>* Status : <input type="text" value="select"/></p> <p>Email : <input type="text"/></p> <p>Comments : <input type="text"/></p> <p>* File Name : <input type="button" value="Choose File"/> No file chosen</p>	<p>Contact Name : <input type="text"/></p> <p>Phone : <input type="text"/></p> <p>* Description : <input type="text"/></p>	
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▶ Notes (0)

- a. **Attachment Type** – Dropdown list of various classifications of attachment. Select the one that best matches what you are attaching. Required.
- b. **Status** – Complete or Incomplete. Use this to indicate whether an attachment is complete or still in progress. This can be useful if multiple people are working on a protocol and uploading documentation at the same time. Required.
- c. **Contact Name** – This field refers to the point of contact for an attachment. The uploader of the document is automatically recorded, so if you are the point of contact, you can leave this field blank.
- d. **Email** – Email address of the person in the **Contact Name** field. Can be left blank if **Contact Name** is left blank.
- e. **Phone** – Phone number of the person in the **Contact Name** field. Can be left blank if **Contact Name** is left blank.
- f. **Comments** – Any comments for the attachment.
- g. **Description** – Description of the attached file. Required.
- h. **File Name** – Click the Choose File button to open your file explorer to select the file you wish to upload. Required.

- 2) Once the attachment form is filled out and the file is uploaded, click the **Add** button to add the attachment to the protocol.

**Protocol Attachments (0)**

The Contact Name, Email, and Phone fields are used to indicate a point of contact for a attached document if that point of contact differs from the person uploading the document. The document uploader's name is captured automatically, so if you are the point of contact for the document, these fields can be left blank.

**Add Protocol Attachment**

\* Attachment Type : select  
\* Status : select  
Email :  
Comments :  
\* File Name : Choose File No file chosen

Contact Name :  
Phone :  
\* Description :

**Add**

**Notes (0)**

Save Reload Close

- 3) If the upload was successful, your screen should look like the image below. Click the Show button to show the details for the attachment.

**Protocol Attachments (1)**

The Contact Name, Email, and Phone fields are used to indicate a point of contact for a attached document if that point of contact differs from the person uploading the document. The document uploader's name is captured automatically, so if you are the point of contact for the document, these fields can be left blank.

**Add Protocol Attachment**

\* Attachment Type : select  
\* Status : select  
Email :  
Comments :  
\* File Name : Choose File No file chosen

Contact Name :  
Phone :  
\* Description :

**Add**

**Attached Items**

Show: select Sort By: Attachment Type

**Show** Species List - Species list for protocol. - Schwartz, Dustin (10/09/2023 11:27 AM)



Attached Items ⓘ

Show:  Sort By:

Species List - Species list for protocol. - Schwartz, Dustin (10/09/2023 11:27 AM)

\* Attachment Type : Species List

\* Status :

Email :

Comments :

\* File Name : Portfolio1.pdf

Uploaded By : Schwartz, Dustin

Upload Timestamp : 10/09/2023 11:27 AM

Contact Name :

Phone :

\* Description :

Updated By : Schwartz, Dustin

Update Timestamp : 10/09/2023 11:27 AM

- 4) The three buttons at the bottom of the section allow you to do the following:
- a. **View** – Download a copy of the attached file.
  - b. **Replace** – Clear the **File Name** field to allow for another file to be selected using the **Choose File** button.
  - c. **Delete** – Delete the attachment. You will see a prompt to confirm the deletion before the file is removed from the protocol.