

## Attach Documents or Add Notes

At the bottom of the screen there will be a section to Add Documents, or Add Notes & Comments. Click on your desired choice **“Add Note”** or **“Add Document.”** If adding notes or documents, be sure to add them to their respective module/workflow.

9999 Public Assistance Test Grant (PA) > Any Texas Town > Account for 9999 (PA) - Any Texas Town

FFY2018 Q3: Apr 2018 - Jun 2018

Routing Complete

Return Delete More

Summary > Quarterly Report Details

This form is to report the progress of projects on a quarterly basis. The quarter end dates are December 31, March 31, June 30, September 30 and this form is due within 15 days of each end date.

Period: 2018 Q3 (Apr 1, 2018 - Jun 30, 2018)

Project Count: 2

Viewed Count: 2 Projects (100.0%)

100% Complete Count: 0 Projects (0.0%)

Fully Closed Count: 0 Projects (0.0%)

Grant

9999 Public Assistance Test Grant  
Public Assistance  
Declared: August 25, 2017  
Emergency Deadline: February 25, 2018  
Permanent Deadline: February 25, 2019

Applicant

Any Texas Town  
Sherman County (5 - Northwest Texas  
Region Region)  
FIPS #: 000.TEST0.00  
State #: 90052 FEIN #: 1111111111  
Vendor #:  
DUNS #: 111222333  
Type: City  
Physical/Mailing: 1 Longhorn Drive  
Sherman, TX.

Workflow Summary

Current Step: 4) Complete  
Extended Description:  
Complete

Last Advanced: Nov 8, 2018 at 1:06 PM by Maria Salazar 322 days ago

Last Note Added: Nov 8, 2018 at 1:06 PM by Maria Salazar 322 days ago

Submission: Jul 19, 2018 at 8:54 AM by User 1 Test 434 days ago

Notes & Comments

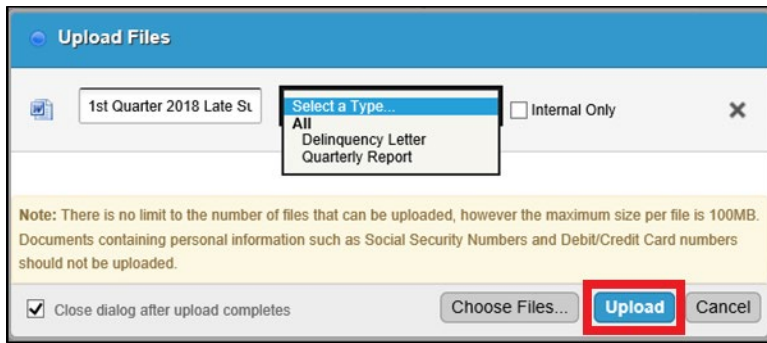
Add Note No Uploaded Documents Add Document

No Issues Add Issues

### Add/Attach/Upload Document

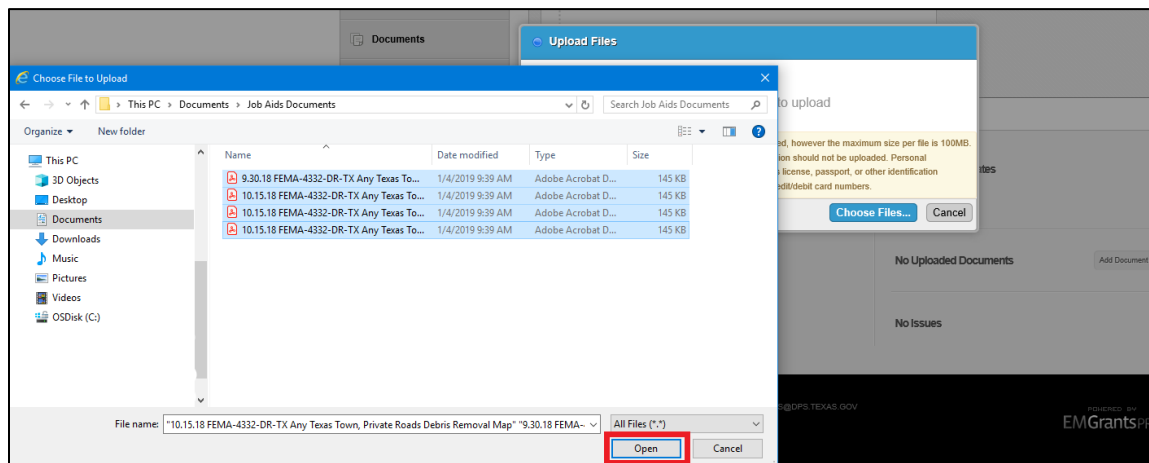
If you are attaching a document to a completed form, make sure to save the form to establish it in the system before uploading supporting documents.

Click the **“Add Document”** button. Click the **“Choose Files”** button to select the document to be uploaded, and then select the type of document from the drop down menu. The selection types in the drop down menu will vary depending on the module/workflow where the document is being uploaded. Click the **“Upload”** button to upload the document.

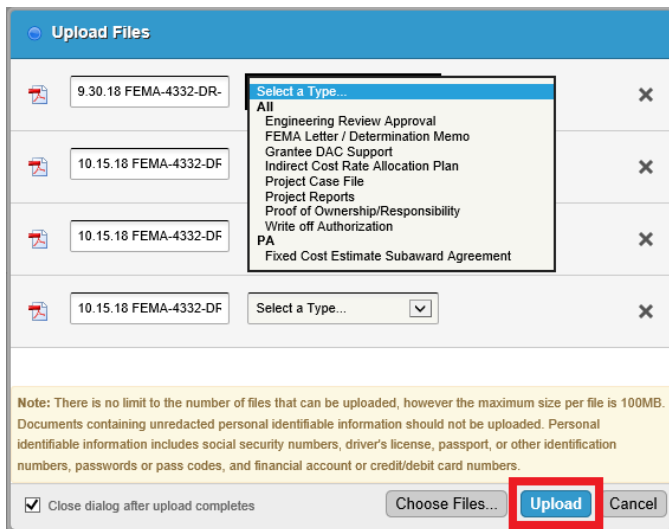


## Add/Attach/Upload Multiple Documents

Multiple documents can be uploaded at once instead of uploading each one individually. They do not need to be the same type of document either. Click the **“Add Document”** button. Click the **“Choose Files”** button to select the documents to be uploaded. Hold down the Ctrl button on your key board to select the documents you wish to upload. Click the **“Open”** button.

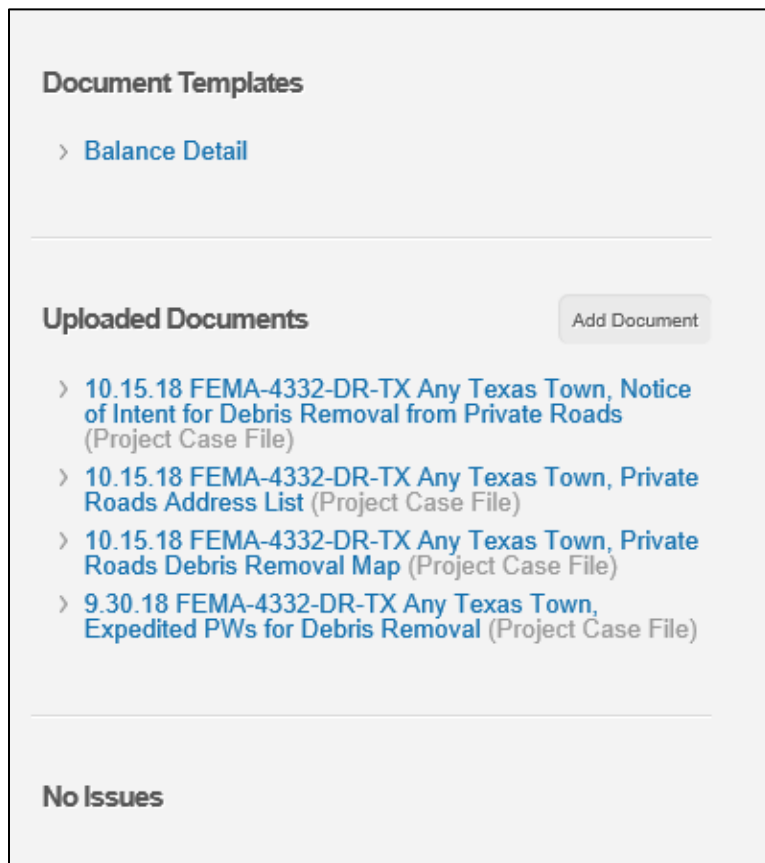


Select the type of document from the drop down menu for each of the documents being uploaded. The selection types in the drop down menu will vary depending on the module/workflow where the documents are being uploaded. Click the **“Upload”** button to upload the documents.



The uploaded documents are listed under the **Uploaded Documents** section at the bottom right of the screen.

**Note:** Only the 10 most recent documents will be visible at the bottom of the page. You can always click on the Documents tab to view other documents.

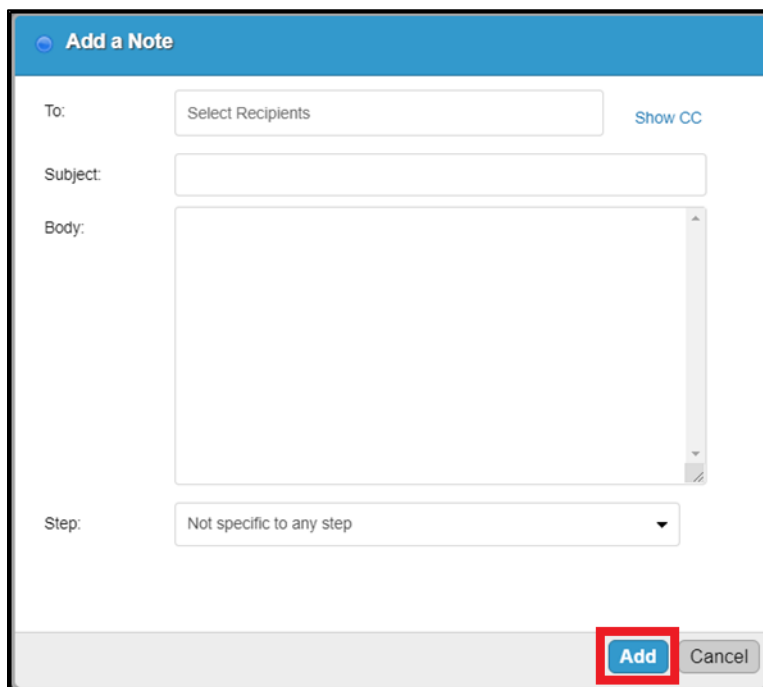


## Add/Attach Notes & Comments

Click the **“Add Note”** button, and complete the short form that will display. If adding notes, be sure to add them to their respective module/workflow.

- 1) **To:** Type the recipient’s name (*names will begin to appear dynamically*).
- 2) **Subject:** Enter a subject.
- 3) **Body:** Add a note or comment.
- 4) **Step:** Select which step the note/comment is pertaining to, or not specific to any step from the drop down menu. The **Step** option may not appear; it depends on the module/workflow.

Click the **“Add”** button to add the note/comment.



The screenshot shows a web form titled "Add a Note" with a blue header. The form contains the following fields and controls:

- To:** A text input field with the placeholder text "Select Recipients" and a "Show CC" link to its right.
- Subject:** A text input field.
- Body:** A large text area for entering the note content.
- Step:** A dropdown menu currently displaying "Not specific to any step".
- Buttons:** At the bottom right, there are two buttons: a blue "Add" button (highlighted with a red box) and a grey "Cancel" button.