

## Overview:

This guide describes proposal, personnel, and internal attachments as well as proposal abstracts.

**Note:** There are 4 types of attachments as shown in tabs at the top of the attachments screen; Proposal, Personnel, Abstracts, and Internal. Another Tab for proposal Notes is also available.

## Procedure:

The **Attachments** panel is where to upload files, such as proposal, personnel, and internal attachments, from your computer and attach to your KR PD record.

Business processes for attachments are based on the submission method (s2s (system-to-system) or non-s2s), sponsor requirements, and department/college guidance.

For non-s2s proposals, attach the documents required for department/college and OSP review. At minimum, this usually includes a budget justification and some kind of brief scope of work (e.g., Project Summary, draft Project Narrative, or a Layman's Abstract) to provide context for the budget review. Check with your department or college research administrator for any other specific required attachments (e.g., additional space request). If the proposal includes subrecipients, their scopes of work and budget information must be attached for OSP review. Guidelines must be provided either as URL (in Questionnaire) or as an Internal Attachment.

An s2s (system-to-system) proposal is submitted directly from KR to Grants.gov, so the KR PD record must include all attachments and information required by the sponsor for your proposal. Read the sponsor instructions carefully for attachment guidelines, including the file format, font, margins, and page limits. Follow sponsor or system specifications for filenames (special characters are usually discouraged; several, including the # sign, are not allowed).



**NOTE:** Special characters in filenames will cause either a *warning or an error* to appear. A warning does not prevent the user from attaching a file. An error for the # character will prevent the attachment from being added.

Additionally, Abstracts and Notes (if needed) can be captured here. **Notes** are not editable once added, and cannot be deleted. Uploads are not allowed in either the Abstracts or Notes sections.

The **Attachments** panel is comprised of five tabs located at the top of the screen:

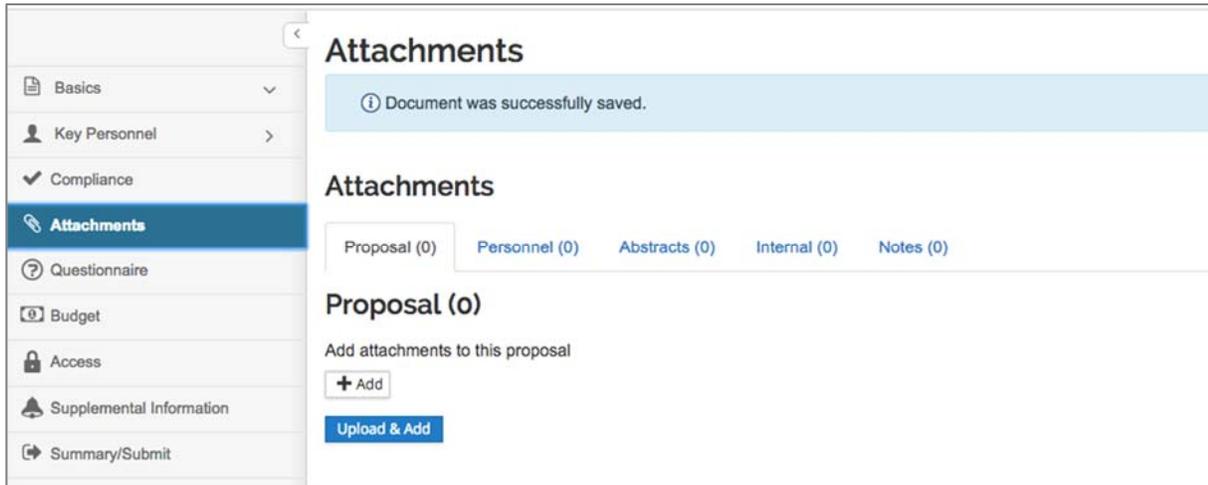


Figure 1 – Attachments Panel

The Attachments section provides two methods of uploading attachments:

- Via the **+Add** button that opens the attachment upload to add *one attachment*
- Via the **Upload & Add** button to upload *multiple attachments* at once.

**To upload Proposal Attachments utilizing the + Add button:**

1. Click on the **Attachments** panel on the **Navigation** panel.
2. In the **Proposal** tab, click the **+ Add** button. The **Details** window will open.

3. In the **Details** window, from the **Attachment Type** drop-down, select the attachment type being uploaded.
4. From the **Status** drop-down, select whether the attachment is **Complete** or **Incomplete**.
5. Complete **Contact Name**, **Email Address**, **Phone Number**, and **Comments** fields as needed.
6. In the **Description** field, enter a brief description of the attachment being uploaded (e.g. Narrative with Scope and Budget)
7. Click the **Choose File** (Chrome) or **Browse** (Firefox) button. Your computer search window will open,

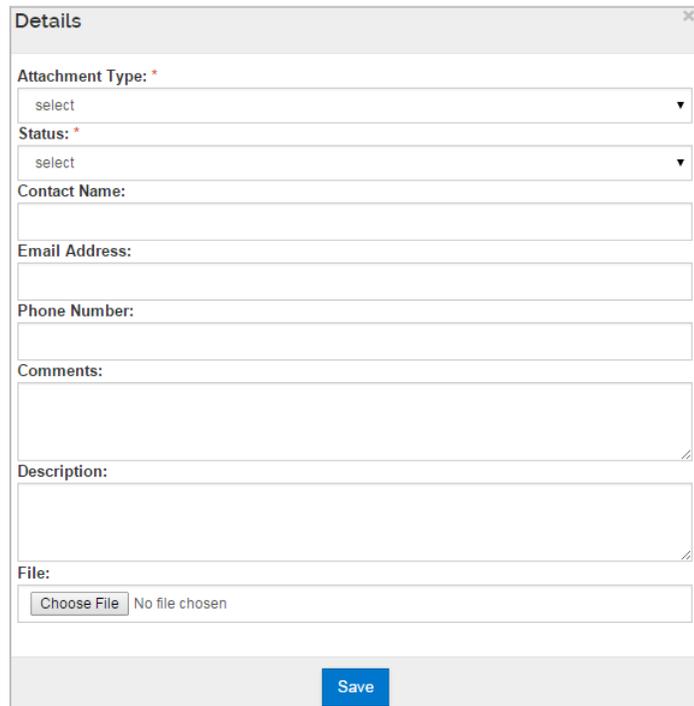


Figure 2 Proposal Attachment Details lightbox

locate the proposal attachment to upload and click the **Open** button.

8. Click the **Save** button to save the attachment and close out of the **Details** window.
9. Repeat these steps to add more proposal attachments.



**Note:** For Non-S2S Proposals, the dropdown menu in Proposal Attachments will display a standard set of attachment types. For S2S Proposals, the dropdown list will display all of the possible attachment types based on the forms in the opportunity that has been attached to the proposal record.

Specific attachment types (e.g., Narrative, BudgetJustification) do not require Description. The **Other** type requires text to be entered in the **Description** field.

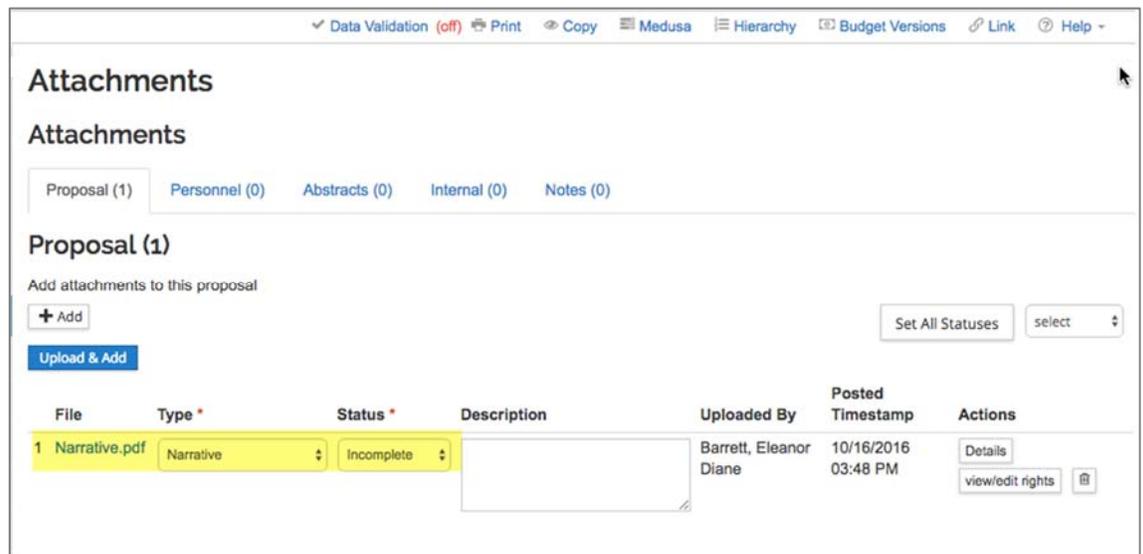
### To upload Proposal Attachments utilizing the **Upload & Add** button:

1. In the **Proposal** tab, click the **Upload & Add** button.
2. Locate/select the proposal attachment(s) you want to upload and click the **Open** button. The file(s) will be added to the **Proposal** screen. Use the appropriate multi-click option for your computer (ex. Ctrl-click for PC vs. Command-click for Mac) to select multiple files at one time.

3. From the **Type** dropdown, select the attachment type being uploaded.

4. From the **Status** dropdown, select whether the attachment is Complete or Incomplete.

5. Click the **Save** button.



File	Type *	Status *	Description	Uploaded By	Posted Timestamp	Actions
1 Narrative.pdf	Narrative	Incomplete		Barrett, Eleanor Diane	10/16/2016 03:48 PM	Details view/edit rights

**Figure 3 Proposal Attachment added**



**Note:** If Attachment Type is allowed to be used multiple times (e.g., "Other") you must enter information in the **Description** field, either typing directly into the field, or clicking on the **Details** button in the Actions column. (The Details lightbox allows for easier editing of multiple fields.)

## Uploading Personnel Attachments

When a proposal is being submitted s2s, some sponsors require Personnel Attachments, such as a Biosketch and/or Current & Pending documents that must be included in the PD record. Please make sure to check the instructions for your opportunity.

### To upload Personnel Attachments utilizing the + Add button:

1. While in the **Attachments** panel, click the **Personnel** tab.
2. In the **Personnel** tab, click the + **Add** button. The **Details** window will open.
3. In the **Details** window, from the **Person** drop-down, select the individual for whom you are uploading the attachment.
4. From the **Type** drop-down, select the attachment type being uploaded (e.g. Biosketch, Current pending, etc.).
5. In the **Description** field, enter a brief description of the attachment being uploaded (e.g. PI Biosketch).
6. Click the **Choose File** button. Locate the personnel attachment to upload and click the **Open** button.

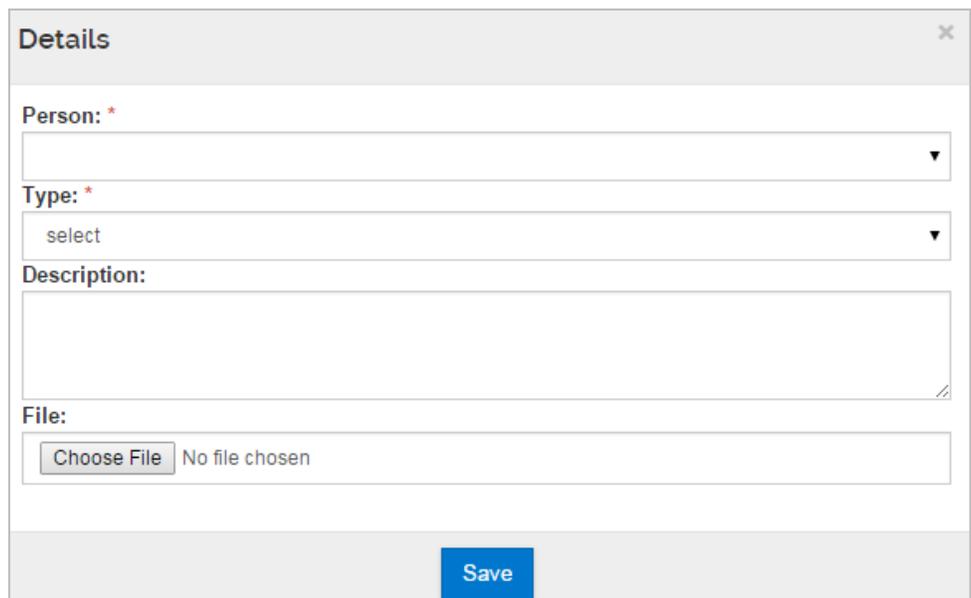


Figure 4 – Personnel Attachment Details lightbox

7. Click the **Save** button to save the attachment and close out of the **Details** window.

The file will be added to the **Personnel** section.



**Note:** The individuals available in this drop-down list are the individuals listed in the **Key Personnel** panel.

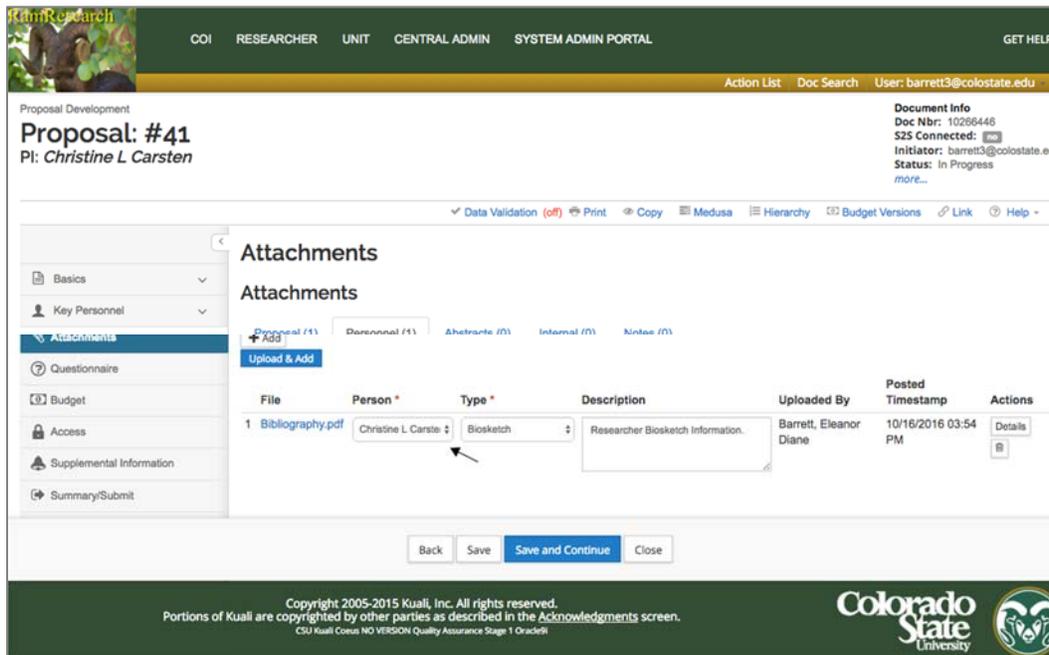


Figure 5 –Personnel Attachment added

8. Click the **Save** button.

Repeat these steps to add more Personnel attachments. Remember that personnel attachments also identify which person the attachment is related to.

Alternatively, you can click the **Upload & Add** button to upload personnel attachments (multiple at a time). After the attachments are uploaded, use the Person dropdown and Type to complete each line item.

**To upload Personnel Attachments utilizing the Upload & Add button:**

1. While in the **Attachments** panel, click the **Personnel** tab.
2. In the **Personnel** tab, click the **Upload & Add** button.
3. Locate/select the personnel attachment(s) you want to upload and click the **Open** button.

 **Note:** Use the appropriate multi-click option for your computer (ex. Ctrl-click for PC vs. Command-click for Mac) to select multiple files at a time.

4. From the **Person** drop-down, select the individual for whom you are uploading the attachment.
5. From the **Type** drop-down, select the attachment type being uploaded (e.g. Biosketch, Current pending, etc.).

6. Click the **Save** button.



**Note:** The individuals available in this drop-down list are the individuals listed in the **Key Personnel** panel.

### Adding Abstracts – (*Optional* for non-S2S Submissions)

Abstracts are required for S2S submissions to certain agencies such as NSF. You may copy and paste text into this screen (copy from a text-only editor to avoid hidden special characters). Abstracts include: Relevance, Reviewers Not to Include, Deviation Authorization, Project Summary, Technical Abstract, Layman Abstract, Labs, Clinical, Animal, Computer, Office, Other Facilities, Equipment, Other Resources, Suggested Reviewers, Publications, and Areas of Research.

#### To add Abstracts:

1. While in the **Attachments** panel, click the **Abstracts** tab.
2. Click the **Add Abstract** button. The **Add Line** window will open.
3. Select the **Abstract Type** from the **Abstract Type** drop-down
4. Enter the abstract text in the **Abstract Details** field.
5. Click the **Add** button to add the **Abstract** to your proposal.
6. Click the **Save** button.



Figure 6 - Abstract added

### Internal Attachments

The Internal Attachments section is used to add additional information to the PD record, usually for internal review purposes and/or reference in the event an award is received. *Attachments in this section will not be submitted with an s2s proposal submission.*

**Examples** include (but are not limited to) 3<sup>rd</sup> party cost-share commitment forms, subrecipient commitment forms, department or college required forms or information, split of F&A form, guidelines. Descriptions should be provided for each line item.