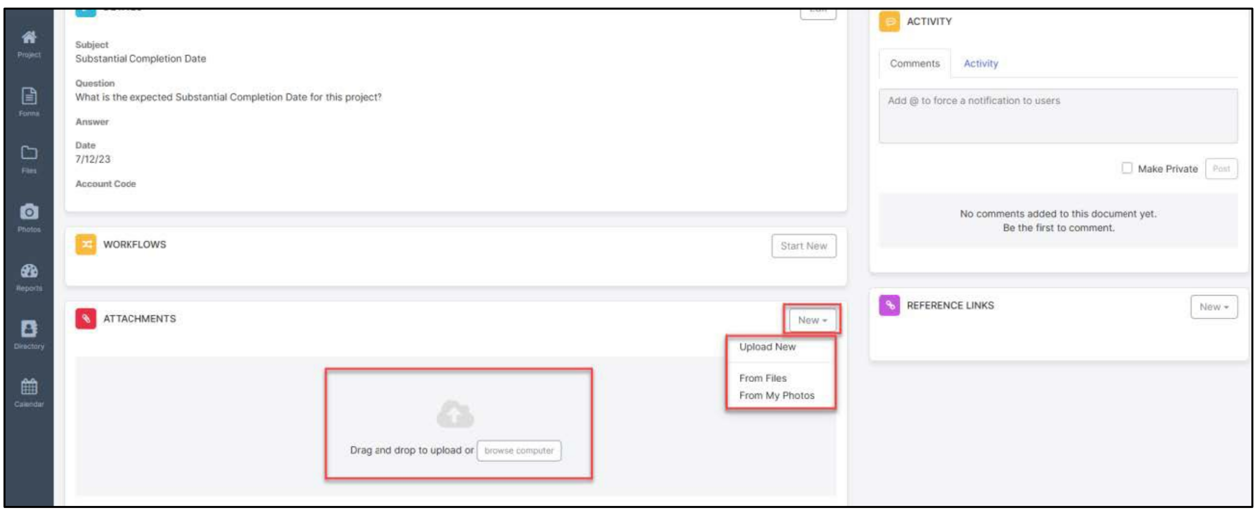
ADDING ATTACHMENTS TO FORMS

Every form type in ProjectTeam.com includes a default Attachments panel that allows you to upload files, photos, videos, and more.

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

ADD NEW ATTACHMENTS

There are several ways to add new attachments to a record.



1) *Drag and Drop*
   a) Open the record.
   b) Drag and drop one or more files to the gray box in the **Attachments** panel.
2) *Select Files from Your Computer or Device*
   a) Open the record.
   b) Click the **New** button at the top of the **Attachments** panel.
   c) Select **Upload New** from the dropdown.
   d) Choose the file(s) you want to attach from the file explorer window.
   e) Click **Open**.
3) *Add Files that Already Exist in ProjectTeam*

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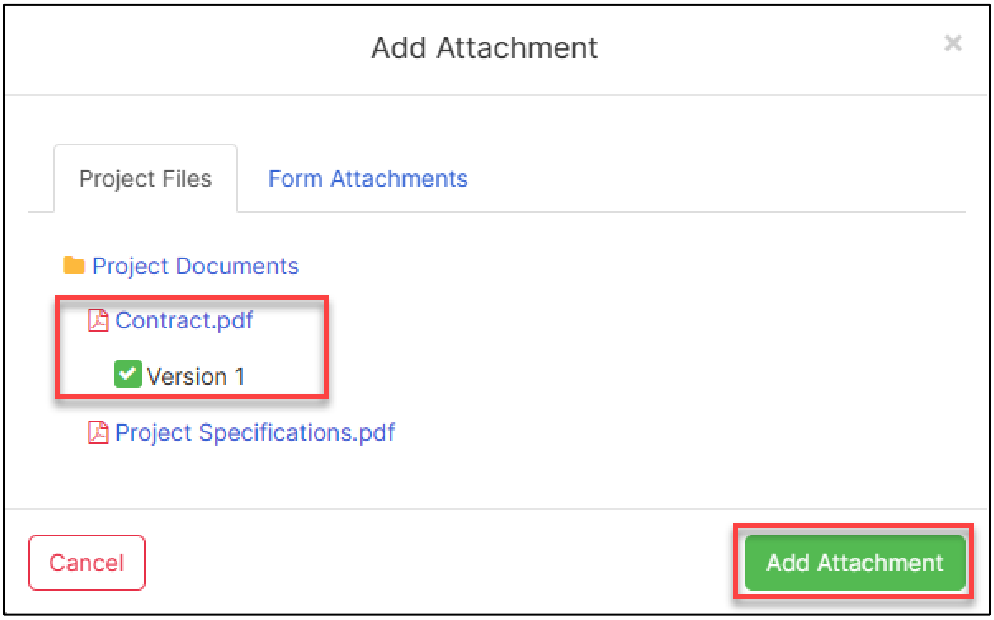
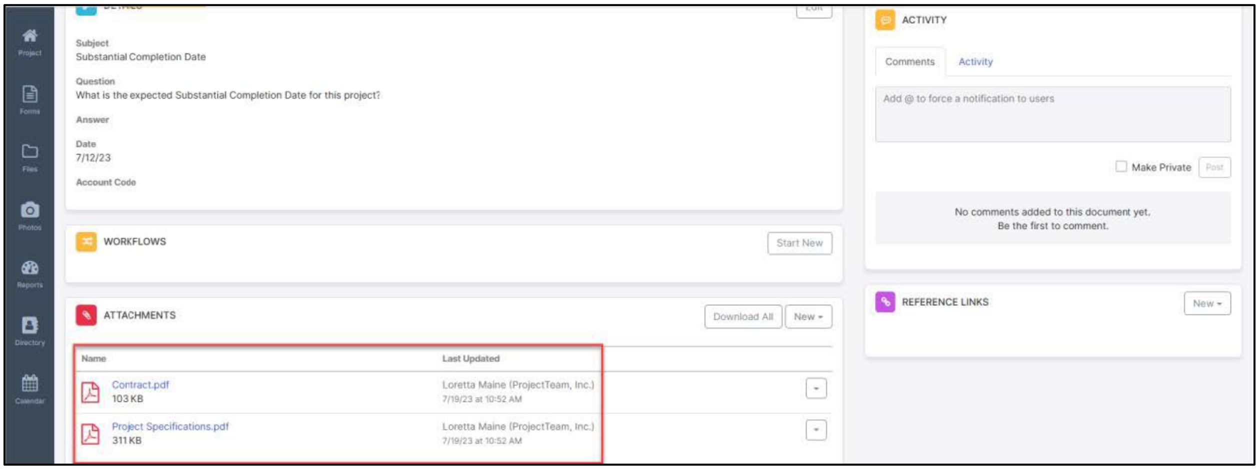
a) In addition to adding new files from your computer, you can also copy existing files that have already been added to the file structure or an attachment on another form.
  i) Open the record.
  ii) Click the **New** button at the top of the Attachments panel.
  iii) Select **From Files** from the dropdown.
  iv) A modal window appears showing you a folder structure of existing files that you have access to within your project.
  v) Navigate through the folder structure and click on the file you want to copy over to your form.
  vi) Select the Version.
  vii) Repeat Steps 5 & 6 for adding additional files.
  viii) Click the **Add Attachment** button.



VIEW ATTACHMENTS

In the Attachments panel, you'll see a list of all existing attachments included with the form. The list shows the following information:

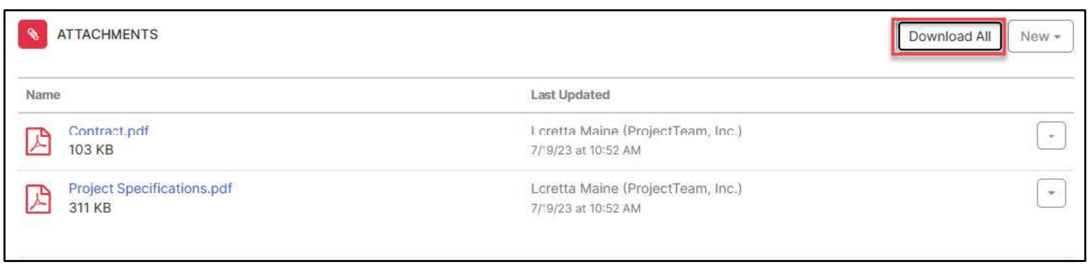
- File name
- File size
- User's name that uploaded the latest version of the file
- Date and time of when the latest version was uploaded



DOWNLOAD ALL RECORD ATTACHMENTS

The attachments on a form typically act as additional documentation to the form fields. In many cases, you might want to download all attachments quickly so that you can review the information and provide a response to the form.

1) Open the record.
2) Click the **Download All** button at the top of the Attachments panel.



3) A zip folder is created and saved to your computer's **Downloads** folder.

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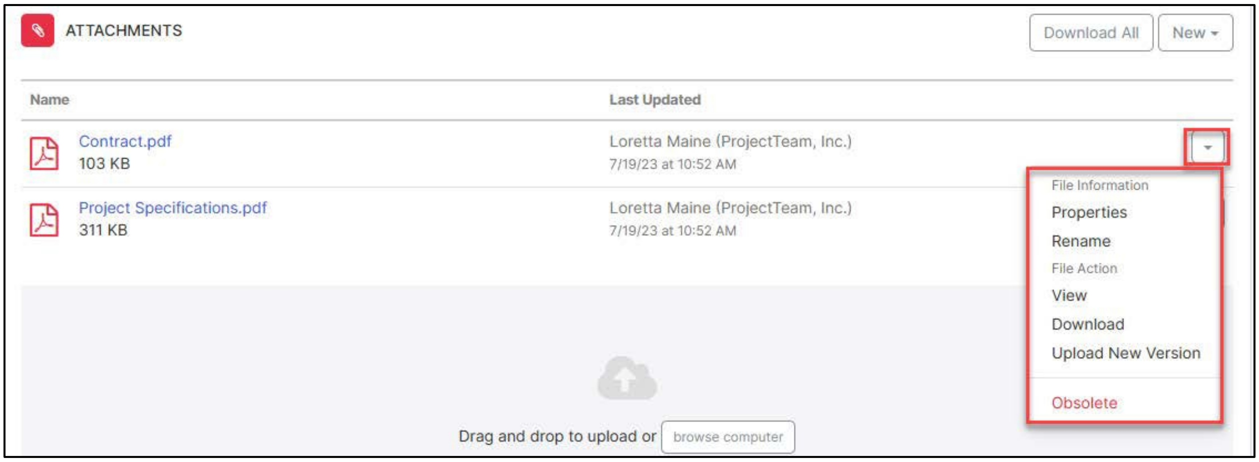
ATTACHMENT ACTIONS

Next to each attachment, you'll see a dropdown. The dropdown shows a list of actions that can be performed on each of the files.



Properties: View and Edit the meta data of the attachment including File Name, Description, and Previous Versions. Action Items can be assigned and Comments added from the records Properties.

Rename: Brings up a modal window that allows you to quickly Edit the Name of the attachment.

View: Brings up the attachment in a file viewer. ProjectTeam has a viewer that will show .PDF, images, and .TXT files. Other file types such as MS Word, Excel, and PowerPoint will be downloaded to your computer instead of in the viewer.

Download: Downloads the individual file to your computer's Download folder.

Upload New Version: Allows you to select a file to upload a new version of the attachment. After the upload has finished, a version tag will be shown next to the file name giving a clear indication that a newer version has been added.

Obsolete: Marks the file as Obsolete. Obsolete files will not be shown in the Attachments panel. As with other areas of ProjectTeam, once information has been added to the system and Shared, there is no way to Delete the information. However, users can Obsolete the attachment which essentially "hides" it from the current view.

Delete: You will only see the Delete option if the form has not yet been Shared. Once the form has been Shared, the option to Delete will be taken away and you will only be able to Obsolete the attachment. Deleting the attachment will completely remove it from the system and it will not be recoverable.

RELATED RESOURCES

Help Center Links:

- **Adding Attachments to Forms** (projectteam.com)

QRGs and Training Videos

- Sharing Records
- Initiating and Completing a Workflow
- Creating Action Items
- File Management Overview
- Photo Management
- Creating RFIs
- Responding to RFIs
- Creating Submittals
- Reviewing Submittals
- Revising Submittals
- Creating Drawings and Packages
- Viewing and Marking Up Drawings
- Revising Drawings and Packages
- Creating Meeting Minutes
- Creating Daily Reports
- Creating Punchlists
- Managing Punchlists
- Completing Punchlist Items