

eForms- Adding/Deleting Attachments

Retirement

Action

Actions Retirement ▼ **Status Saved**

Contact Information

Save Submit Approve Deny

1. Once the required fields have been completed, click the **Save** button.

Note: The eForm must be saved before attempting to attach a document.

Attachments

| Type | Note | Attached File | Attach Date/Time | By |
|------|------|---------------|------------------|----|
| 1 | | | | |

Add/Delete

2. Select the drop down icon to open the **Attachments** section.

3. Click on the **Add/Delete** button

Add/Delete Attachments

Request ID 00016070

| Attachment Type* | Note* | Attached File | Attachment Date Time | By | Add |
|---------------------------------|-------------------|---------------|----------------------|----|-----|
| Miscellaneous Retirement Letter | Retirement Letter | | | | |

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4. Under **Attachment Type** drop down make the appropriate selection.

5. Enter the title/short description of the attachment in the **Note** section. This section is required.

6. Click on the **Add** icon.

File Attachment

Upload

7. Click the **Browse** button and from the File Explorer search/choose the file.

8. Select the **Upload** button to add the file.

PeopleSoft Tip: If the wrong document is attached and needs to be deleted, select the **Back to Request** button and re-select **Add/Delete** under the Attachments section. The **Delete** icon will appear, select the icon; a pop up message will open, select **yes** to delete the document.

Add/Delete Attachments

Request ID 00016070

| Attachment Type* | Note* | Attached File | Attachment Date Time | By | View | Delete |
|------------------|-------------------|-------------------------------------|----------------------|---------------|------|--------|
| Retirement Lette | Retirement Letter | Paydirt_Pete__Retirement_Letter.pdf | 11/05/18 11:06AM | Espino, Diana | | |

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9. To **view** the attachment select the **View** icon, a new tab will open with the attachment.

10. To **upload another** attachment select the icon; a new row will appear, repeat step 7-8.

11. Once the attachment has been uploaded return to the eForm by selecting the **Back to Request** button.

12. **Save** the form and make any additional changes if needed, before submitting.

Contact Information

Save Submit Approve