



# **Adding Attachments**

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

Add New Attachments View Attachments Download All Record Attachments Attachment Actions Related Resources

#### Add New Attachments

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

Project	Subject Substantial Completion Date	Comments Activity
Forms	Question What is the expected Substantial Completion Date for this project?	Add @ to force a notification to users
	Answer Date	
Files	7/12/23	Make Private Post
_	Account Code	
Dhotos		No comments added to this document yet. Be the first to comment.
~	X WORKFLOWS	
Reports		
8	ATTACHMENTS	S REFERENCE LINKS
Directory	Upload New	
Ê	From Files From My Photos	
Calendar		
	Drag and drop to upload or browse computer	

#### Drag and Drop

- 1. Open the record.
- 2. Drag and drop one or more files to the gray box in the Attachments panel.

#### Select Files from Your Computer or Device

- 1. Open the record.
- 2. Click the **New** button at the top of the **Attachments** panel.
- 3. Select **Upload New** from the dropdown.
- 4. Choose the file(s) you want to attach from the file explorer window.
- 5. Click **Open**.

#### Add Files that Already Exist in ProjectTeam

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.

- 1. Open the record.
- 2. Click the **New** button at the top of the Attachments panel.
- 3. Select **From Files** from the dropdown.
- 4. A modal window appears showing you a folder structure of existing files that you have access to within your project.
- 5. Navigate through the folder structure and click on the file you want to copy over to your form.
- 6. Select the Version.
- 7. Repeat Steps 5 & 6 for adding additional files.
- 8. Click the **Add Attachment** button.

	Add Attachment				
Project Files	Form Attachments				
Project Documents					
Contract.pd					
Project Specifications.pdf					
Cancel		Add Attachment			

## **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

Project	Subject Substantial Completion Date Question What is the expected Substantial Completion Date for this project?		LUK	Comments Activity Add @ to force a notification to users
Forms	Answer			Add @ to force a notification to users
Files	Date 7/12/23 Account Code			Make Private Post
Photos	WORKFLOWS		Start New	No comments added to this document yet. Be the first to comment.
Reports Directory	ATTACHMENTS		Download All New +	REFERENCE LINKS
Calendar	Name Contract.pdf 103 KB	Last Updated Loretta Maine (ProjectTeam, Inc.) 7/19/23 at 10:52 AM		
	Project Specifications.pdf 311 KB	Loretta Maine (ProjectTeam, Inc.) 7/19/23 at 10:52 AM	*	

## **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.

## **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.

<b>N</b>	TTACHMENTS		Download All New -
Name		Last Updated	
	Contract.pdf 103 KB	Loretta Maine (ProjectTeam, Inc.) 7/19/23 at 10:52 AM	File Information
	Project Specifications.pdf 311 KB	Loretta Maine (ProjectTeam, Inc.) 7/19/23 at 10:52 AM	Properties Rename File Action
			View Download Upload New Version Obsolete
		Drag and drop to upload or browse computer	

*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:
  - o 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
  - o Reviewing Submittals
  - Revising Submittals
  - Creating Drawings and Packages
  - Viewing and Marking Up Drawings
  - o Revising Drawings and Packages
  - Creating Meeting Minutes
  - Creating Daily Reports
  - Creating Punchlists
  - Managing Punchlists
  - Completing Punchlist Items