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UNIVERSITY OF ALBERTA

PeopleSoft HCM

# Adding Attachments to eForms

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# Adding Attachments to eForms

Business process requires specific documents be attached to certain kinds of eForms. An **Attachments** section is available in every eForm, which allows you to attach an electronic copy of any documents. These required documents are also referred to as ePAFs (electronic Personnel Action Forms). This is beneficial because of the security restrictions associated with the ePAF, i.e. these types of attachments should only be viewed by certain users with specified security. In addition, having these attachments at the ePAF level makes them easily accessible for Approvers.

In this topic you will learn where to find the attachment section within an eForm and how to add an attachment.



## To Begin the Online Tutorial:



- Click the  button located in the top left of the screen and follow the instructions provided.

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## Procedure

Navigation Path:

**Main Menu > UofA eForms WorkCenter > Add an eForm**

or

**Main Menu > UofA eForms WorkCenter > Update an eForm**

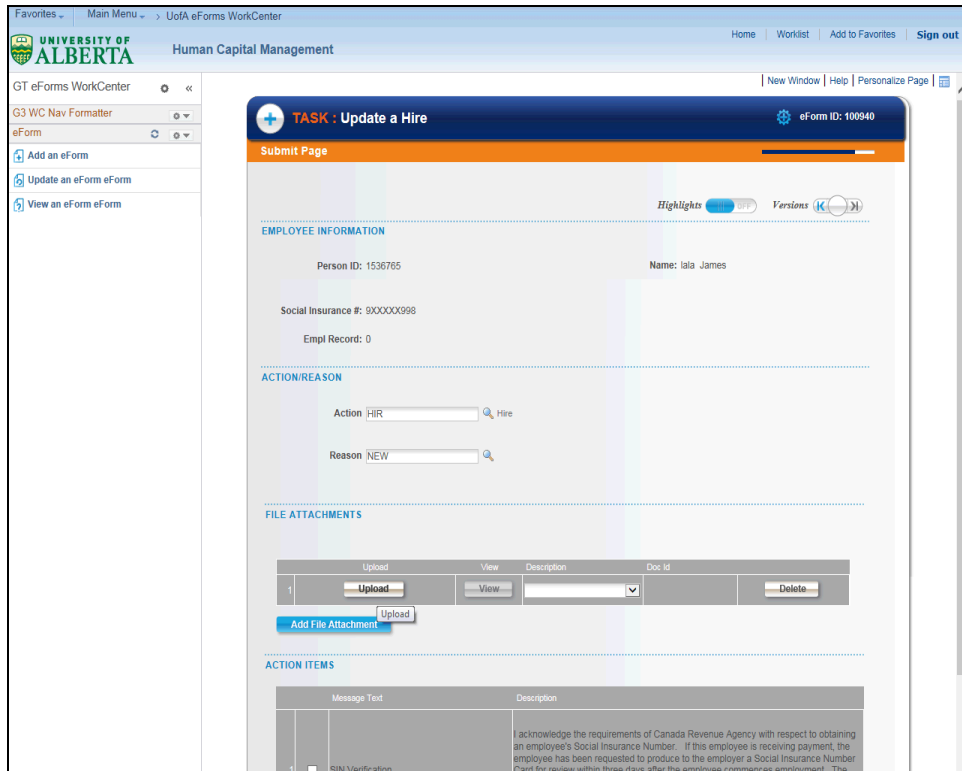
1. All eForm types require the supporting documents to be completed, signed, scanned, and attached within the eForm.

### **Important!**

Prior to creating an eForm, ensure you have scanned the signed documents and saved the file to your computer.

2. Attachments should be added to the eForm at initial creation and prior to submitting the request for approval.

The File Attachments section is located on the **Submit Page** of all eForms and is the last page to be completed or updated before the eForm is submitted.

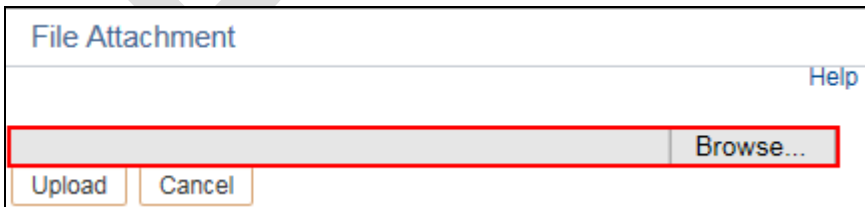


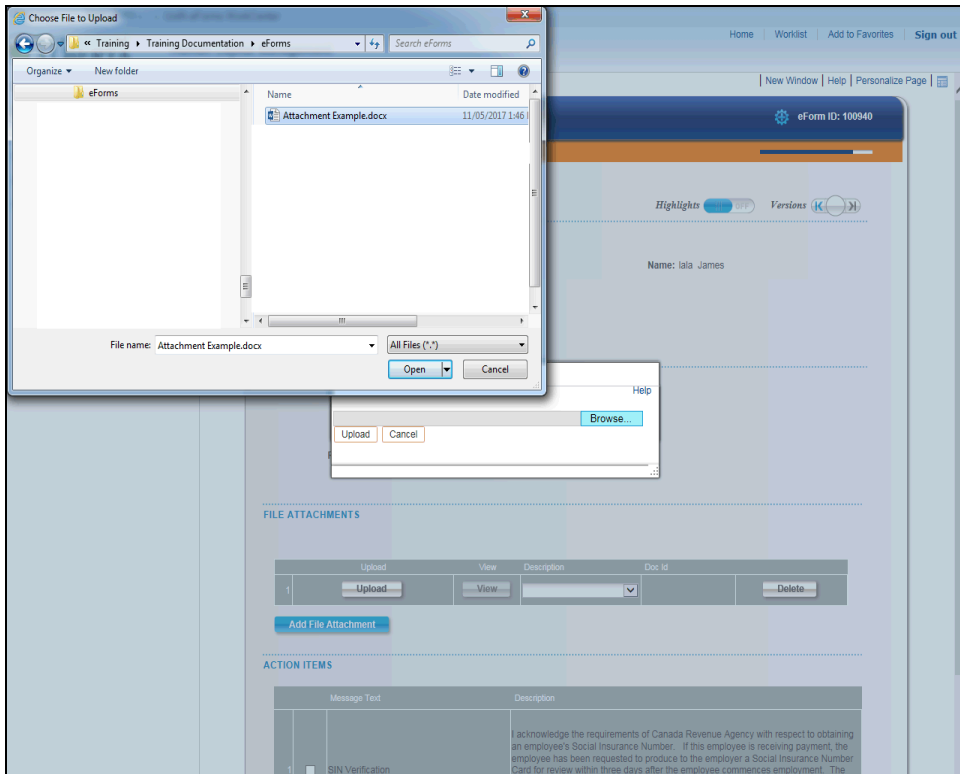
3. When you get to the **Submit Page** of the eForm, go to the File Attachments section.

Click the **Upload** button.



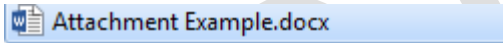
4. Click the **Browse** button.





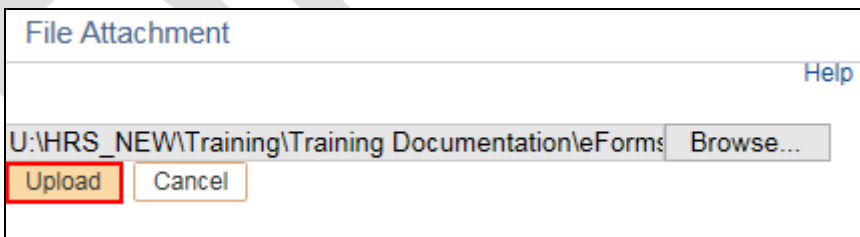
- Find and select the document file you scanned and saved to your computer.

In this example, Double-click the **Attachment Example.docx**.

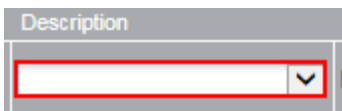


- Note:** Each document must be attached on a separate line. Therefore the system will only allow you to attach one document at a time.

- Click the **Upload** button.



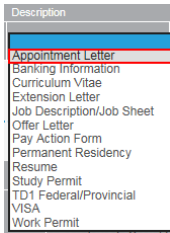
- Click the button to the right of the **Description** field.



9. A list of valid document descriptions is provided. This list may vary depending on the type of eForm you are submitting.

Select the appropriate Description list item.

In this example, click the **Appointment Letter** list item.



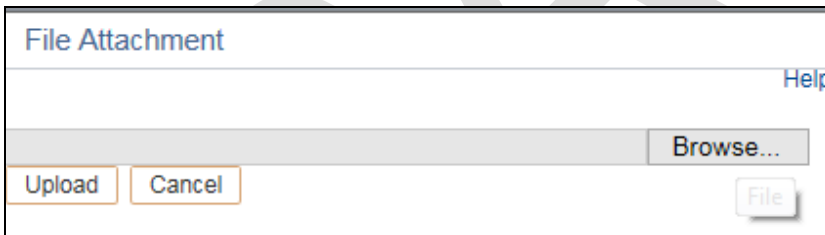
10. To add another document file, click the **Add File Attachment** button.



11. Click the **Upload** button.

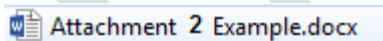


12. Click in the **Browse** field.

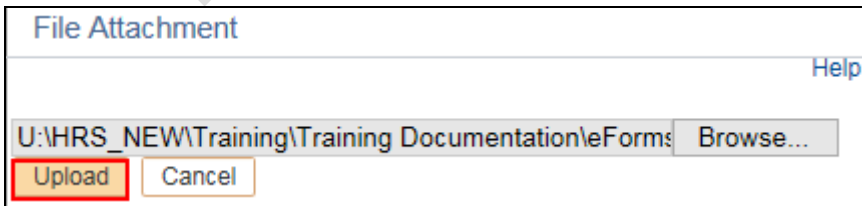


13. Find and select another completed and signed document.

In this example, Double-click the **Attachment 2 Example.docx**.



14. Click the **Upload** button.

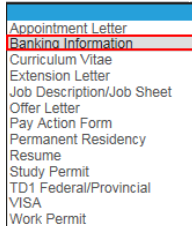


15. Click the button to the right of the **Description** field.

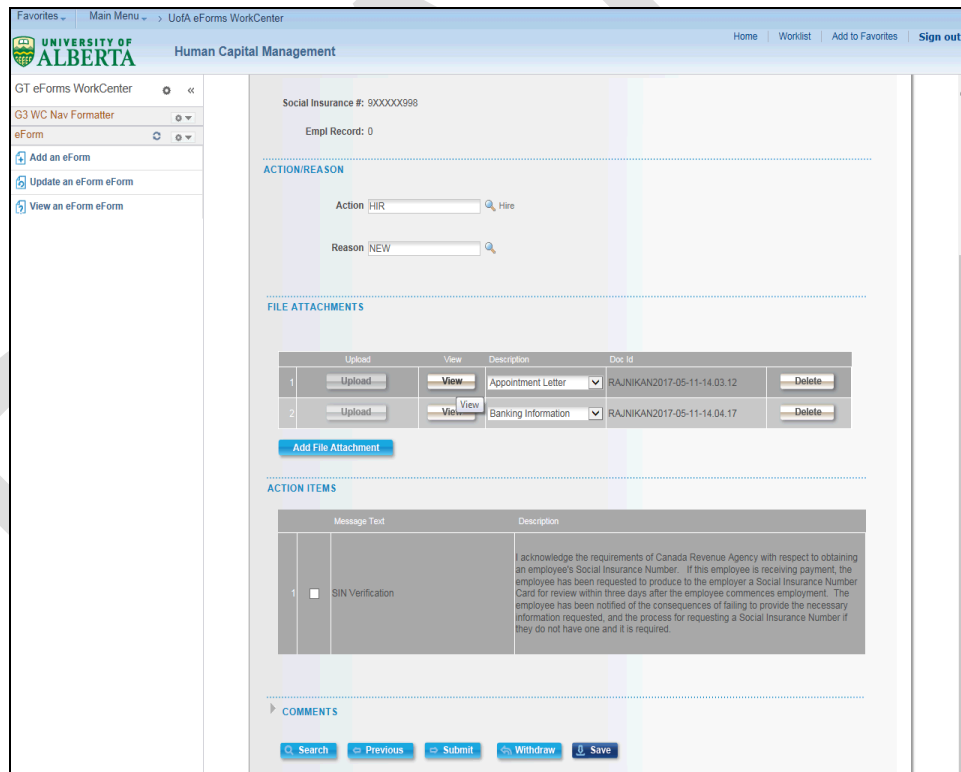


16. Select the appropriate Description list item.

In this example, click the **Banking Information** list item.



17. Continue to **Add File Attachment** lines for each document type, until all required documentation has been attached.

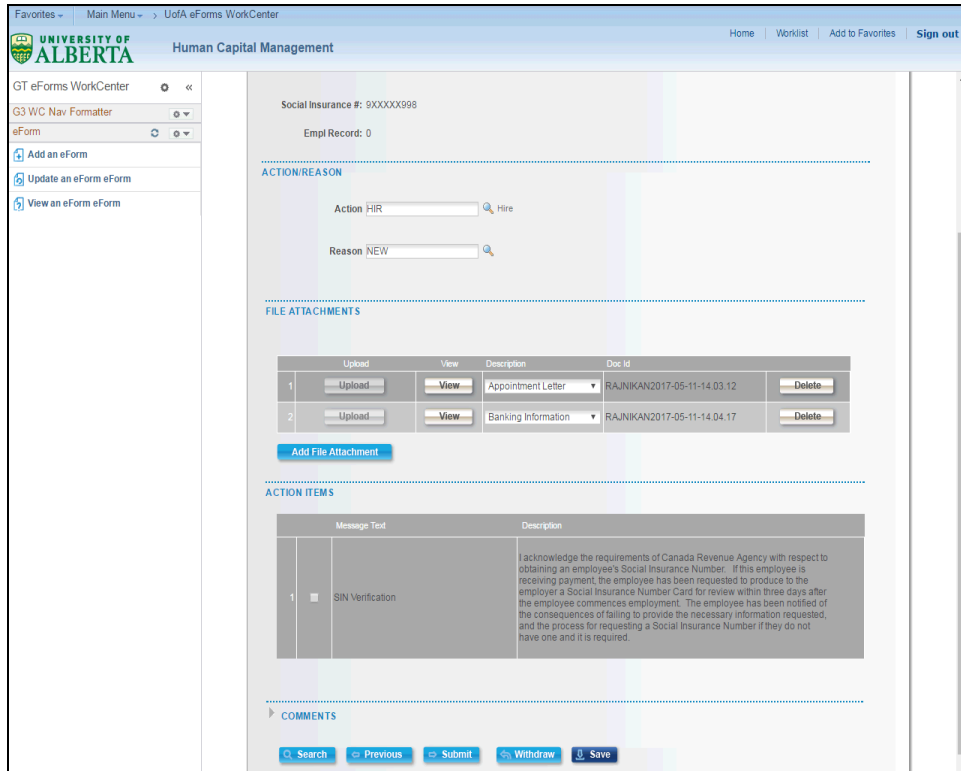


18. Once an attachment line has been added, you can view the actual document.

Click the **View** button.





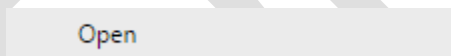


- The internet browser you are using will determine if the document you clicked to view will appear in a separate window or as a selection in the bottom left corner of your screen.

In this example, click the button to the right of the **Attachment\_Example.docx** field.



- Click the **Open** menu.



- The document you selected to view will open in a new window.

**Note:** you may have to disable the window pop-up blocker to view the document. Refer to the web site link provided for further instructions on disabling the pop-up blocker

(<https://support.ctl.ualberta.ca/index.php?/Knowledgebase/Article/View/69/6/disabling-the-pop-up-blocker-in-your-browser>).

22. Once you have added all of the required attachments, click either the **Save** or the **Submit** button.

In this example, click the **Save** button.



23. Congratulations! You have completed the training on how to Add Attachments to an eForm.

**End of Procedure.**