



NCLEAD: Attaching a File Or Word Document to an Event

Often, there may be a document or a file, such as a lab report, letter, or photograph that should be attached to an event. As long as the document is accessible from the user's computer, the file can be attached to an event. Attachment is found on the last line in the Event Summary Box. To attach an event to a file follow these quick steps:

1. Open the Event to which an attachment will be added (**Note:** It is not possible to attach a file to an event without first having the event loaded in the Dashboard)
2. From within the Event Summary box, on the line specifying "Attachments", click on the link that says "Add". (**Note:** "Add" will be highlighted in blue)
3. After you click "Add" a new screen will appear with a box that says "Add Attachment" On the first line of the box click "Browse"
4. Search for the necessary document you would like to attach. (e.g., "Form 3460" or "Form 3651"). Once you locate the file either double click or click "Open". You should then see the file in the top bar of the attachments box.
5. Enter a brief description of the attachment in the next box (this is a required field in NCLEAD)
6. Enter the status, type of attachment, and security level.
7. Add a note if necessary (Note: this is not a required field, but the more information you can provide, the better)
8. Click "Save" once you've entered in all the necessary information. This will bring you to the "Manage Attachments" screen.
9. Your attachment should be listed. Under "Actions", you can view, edit, or delete your attachment. If you would like to add another attachment to your event click "Add attachment" at the bottom of the screen and repeat steps 4-8.
10. Once you are finished adding attachments click "Dashboard" at the bottom of the "Manage Attachments" screen. In the "Event Summary" section it will show the number of the attachments you have attached to the event.