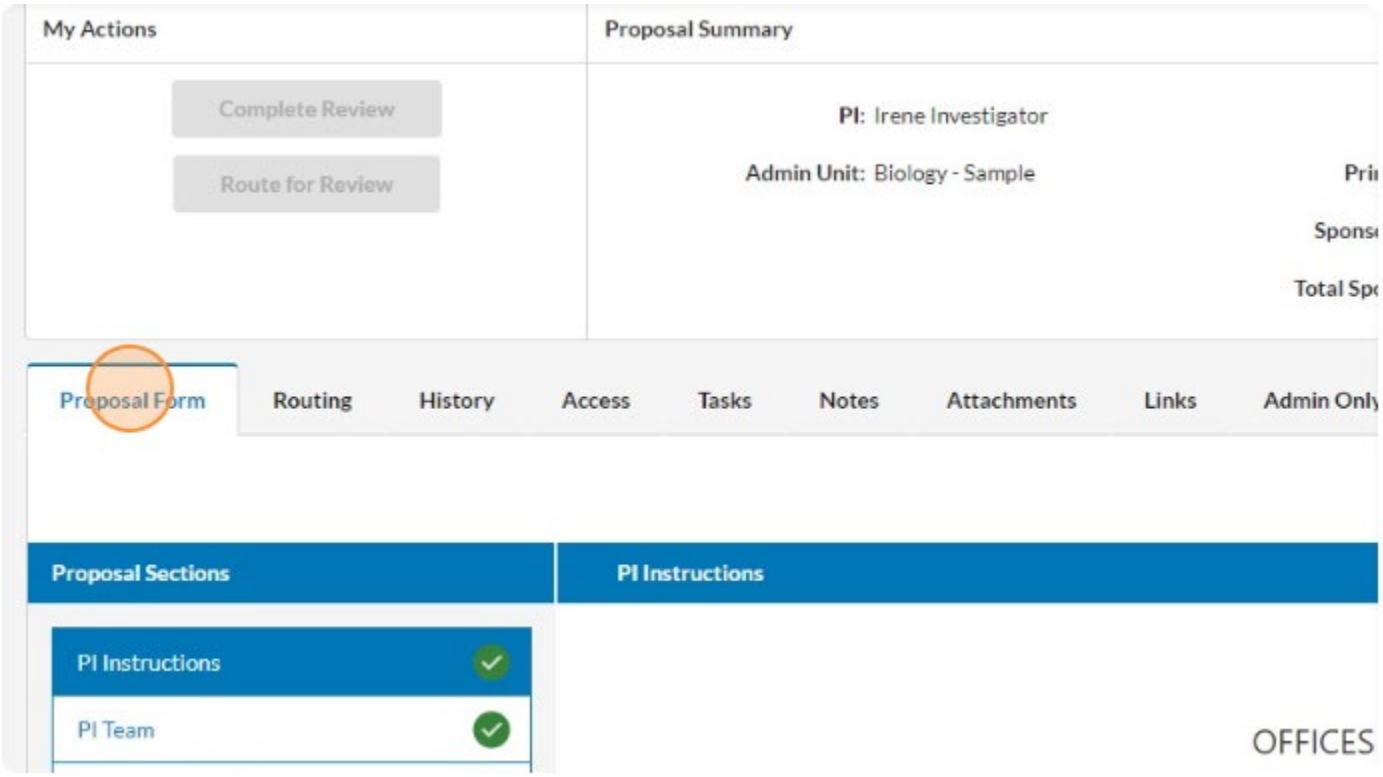
# Proposal Record Sections

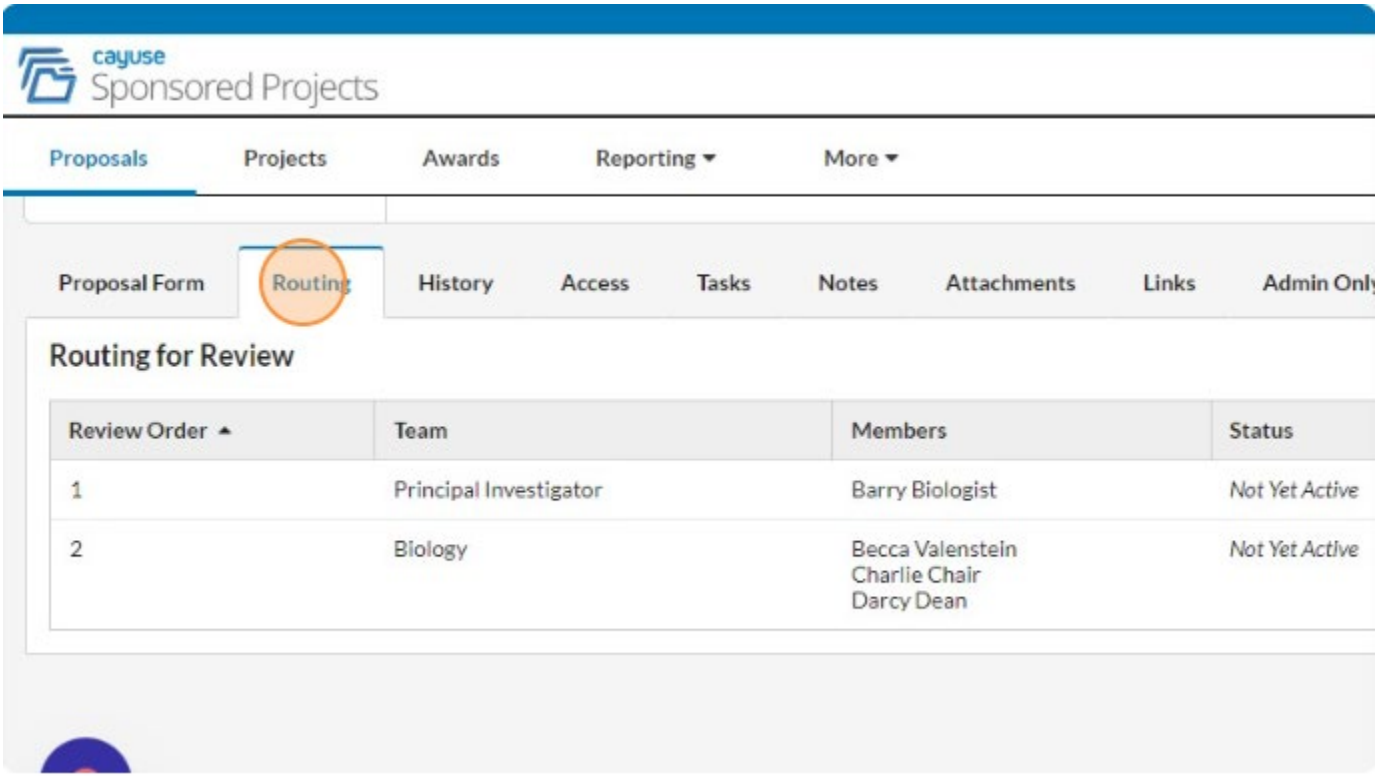
## Proposal Form Tab

1. This is the actual proposal form to be completed and routed. See Guide on how to complete a proposal record for more information.



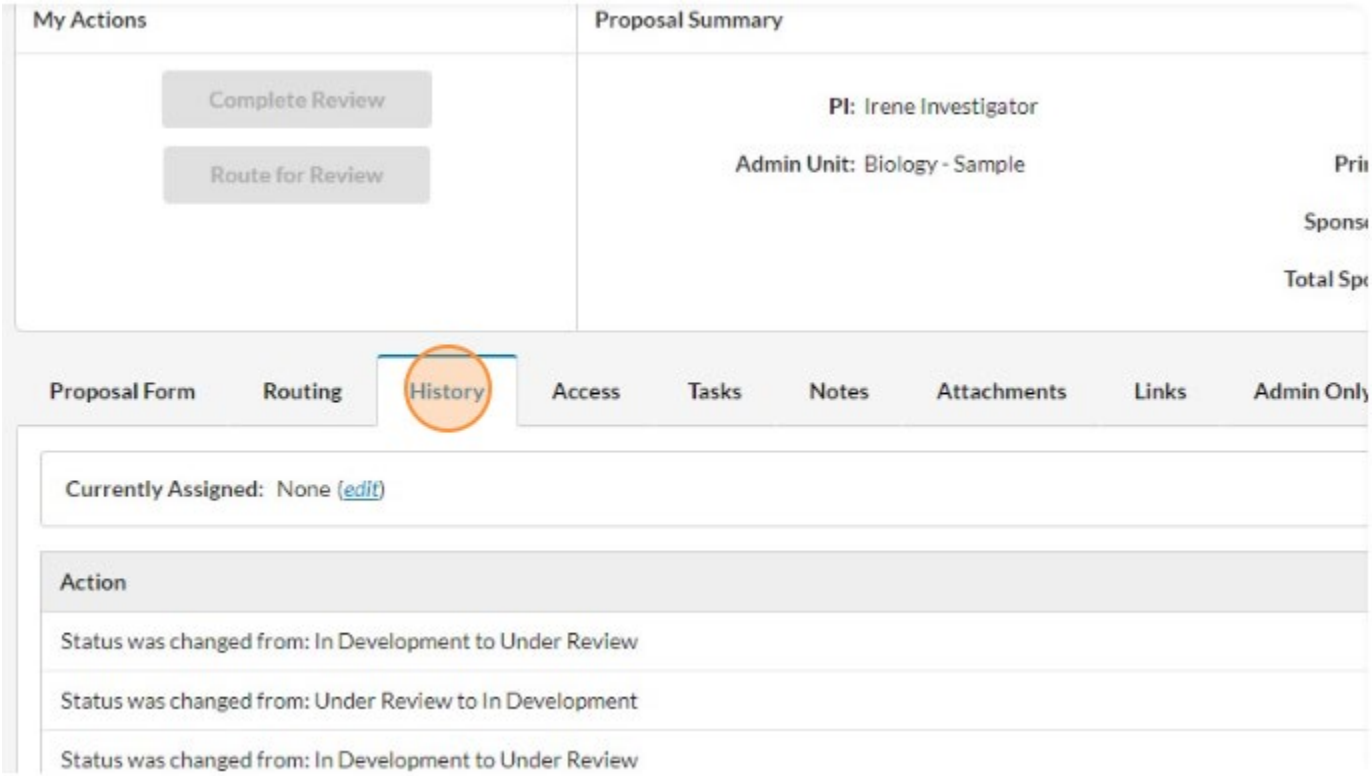
## Routing Tab

1. The Routing Tab shows what routing is required to approve the Proposal record, the order in which the routing will occur, and the status of each approval.

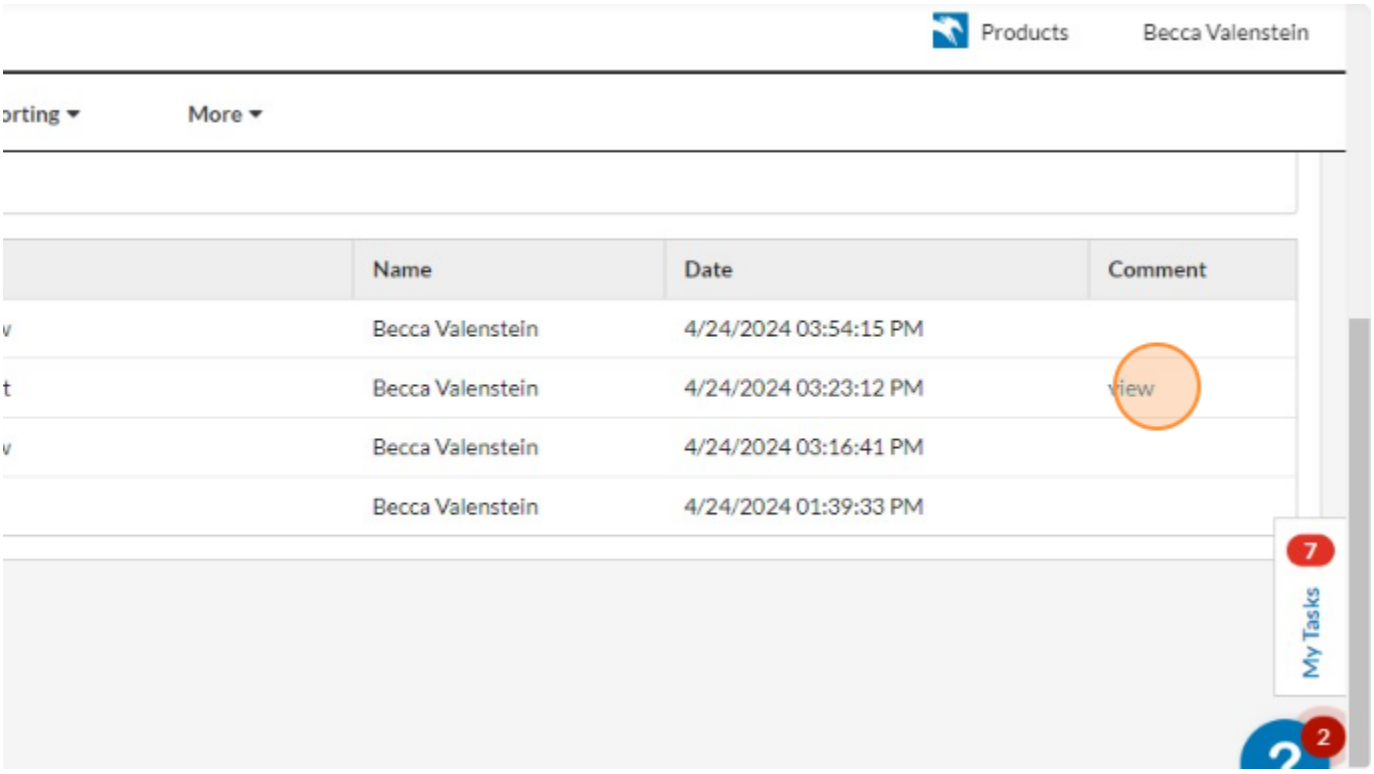


## History Tab

1. The History tab displays status changes of the record, who did it, when it was done, and any comments that were made regarding the change.

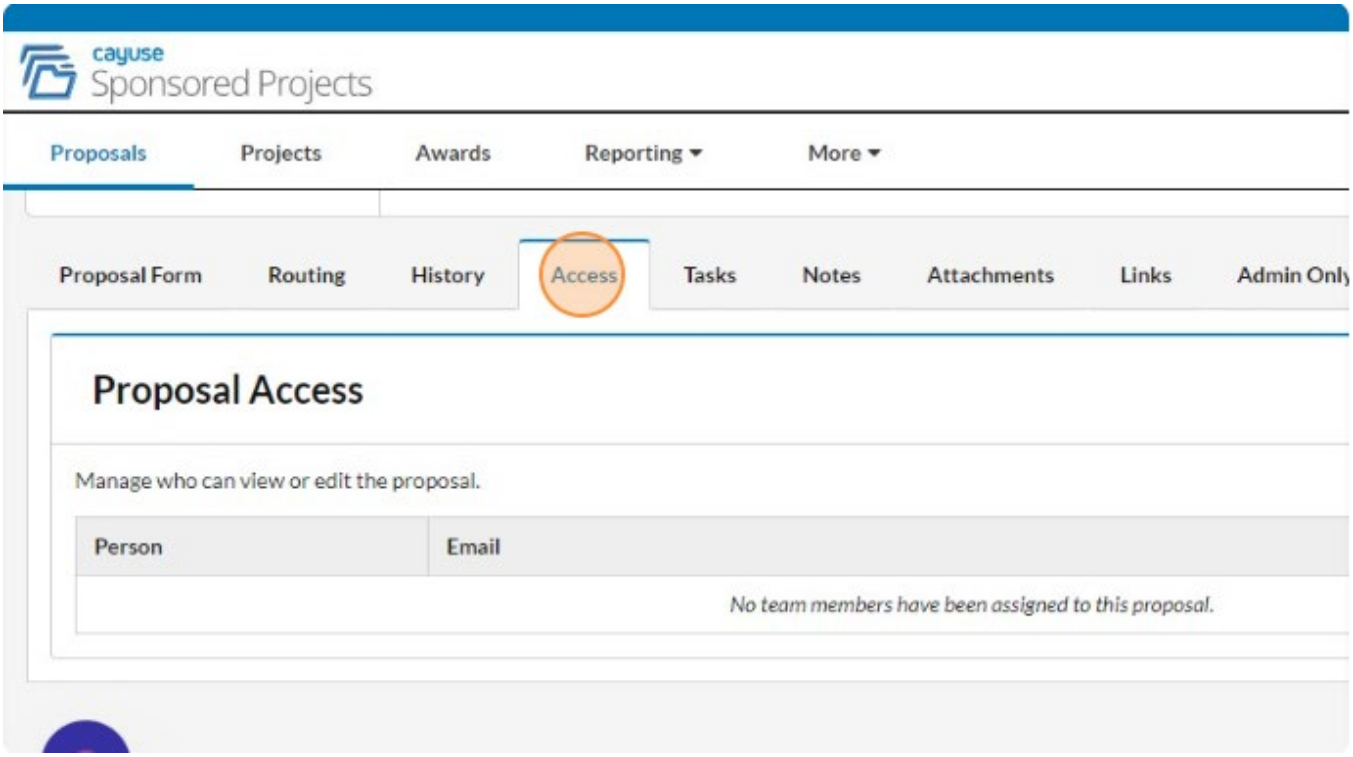


2. To view any comments, click the "view" hyperlink and a pop-up window will display the comments.

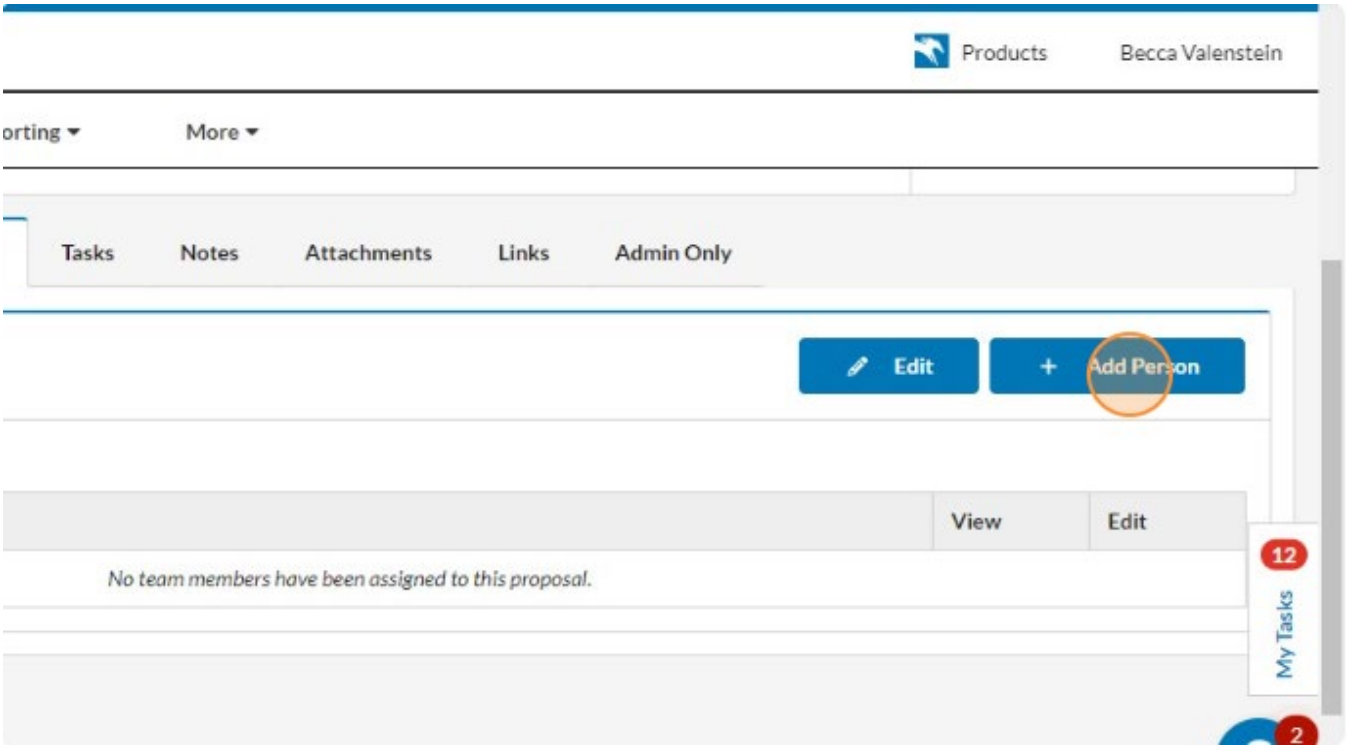


## Access Tab

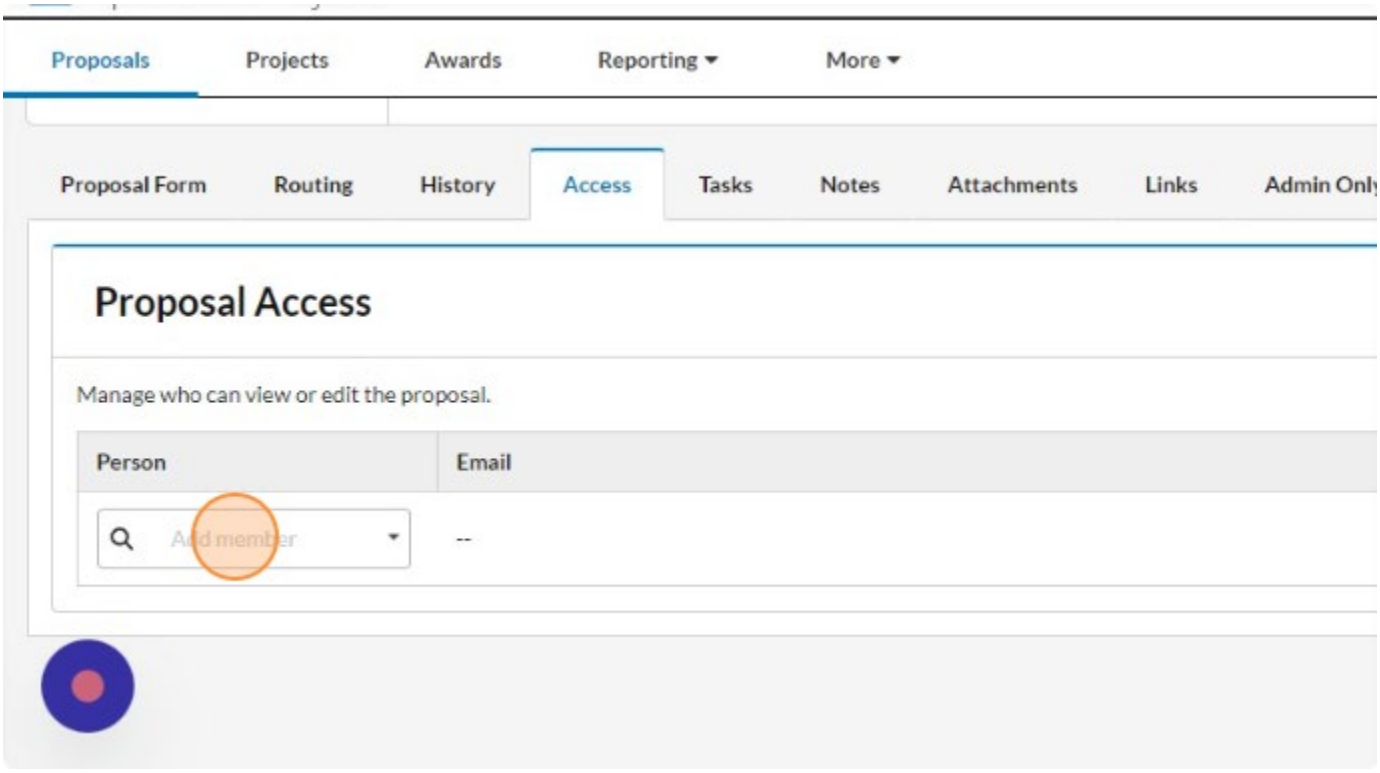
1. The Access Tab allows users to grant either view or edit access to the proposal record to other users who do not otherwise have access. E.g. you can use this tab to provide access to departmental admin staff.



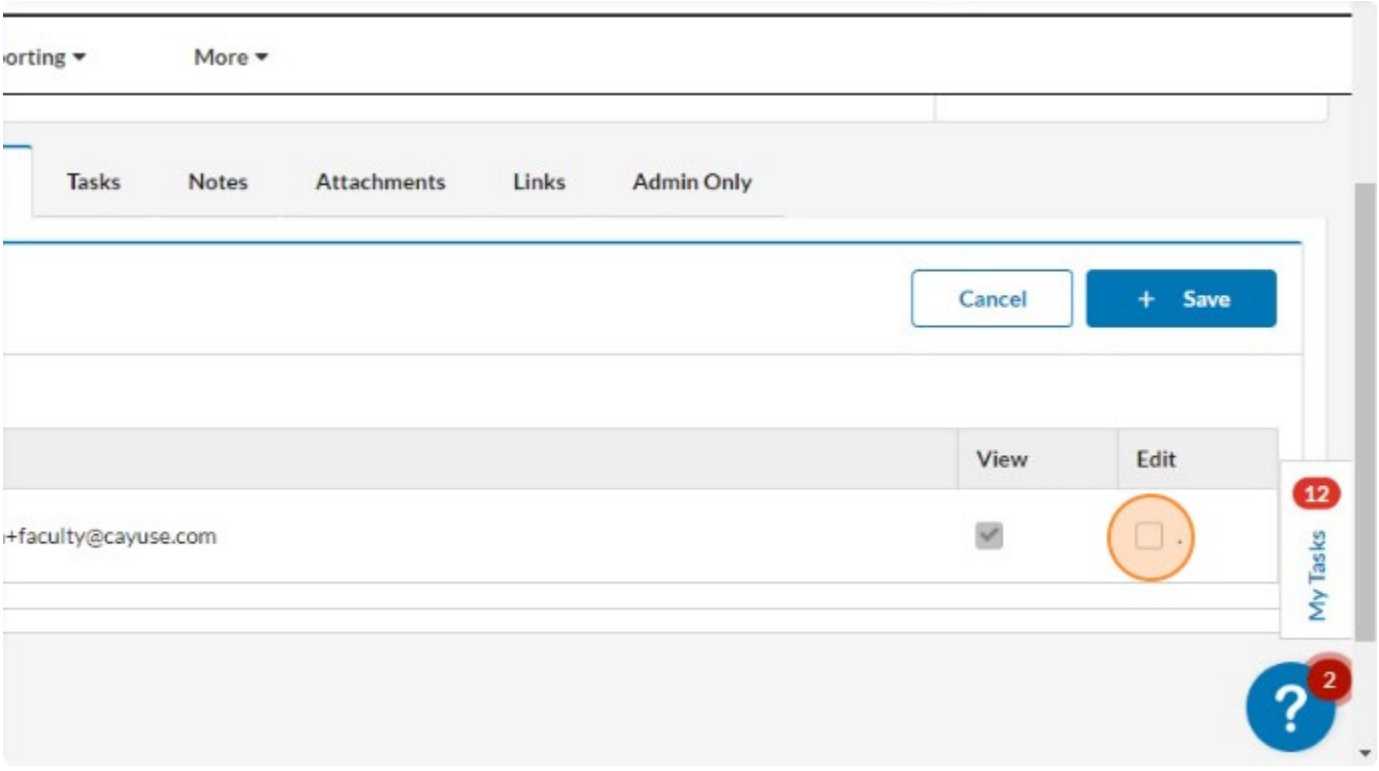

2. Click "Add Person"



3. Search for the user to be granted access.

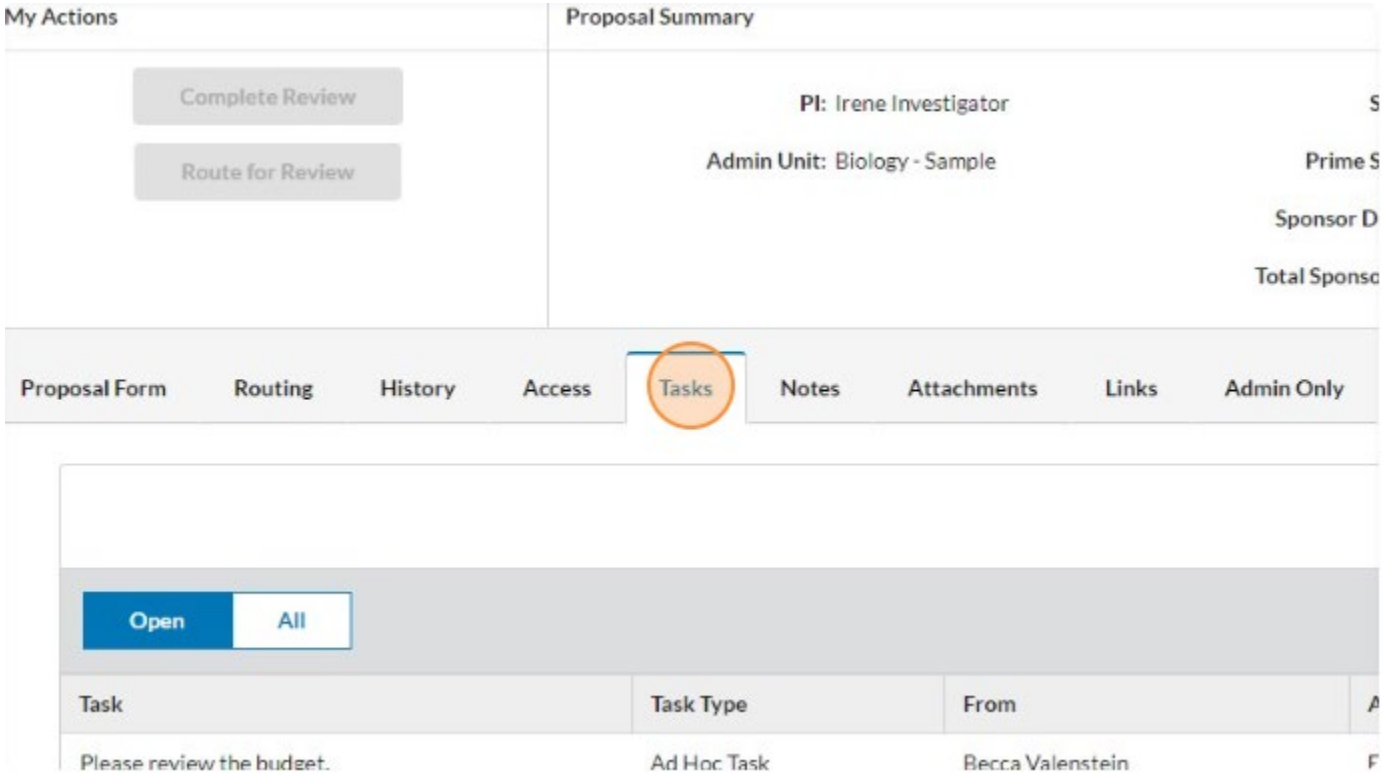



4. Determine whether the user should have View or Edit access (view access is granted by default), and click "Save".

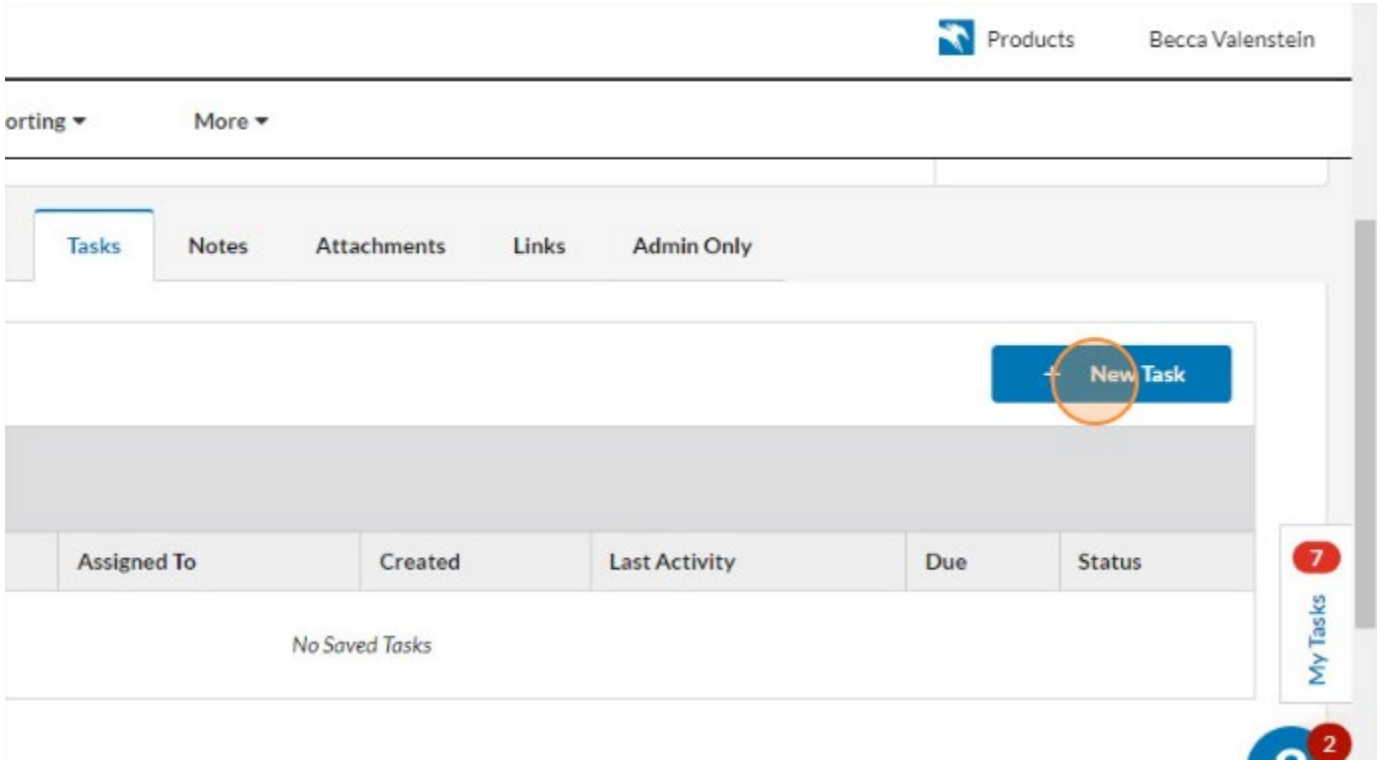


# Tasks Tab

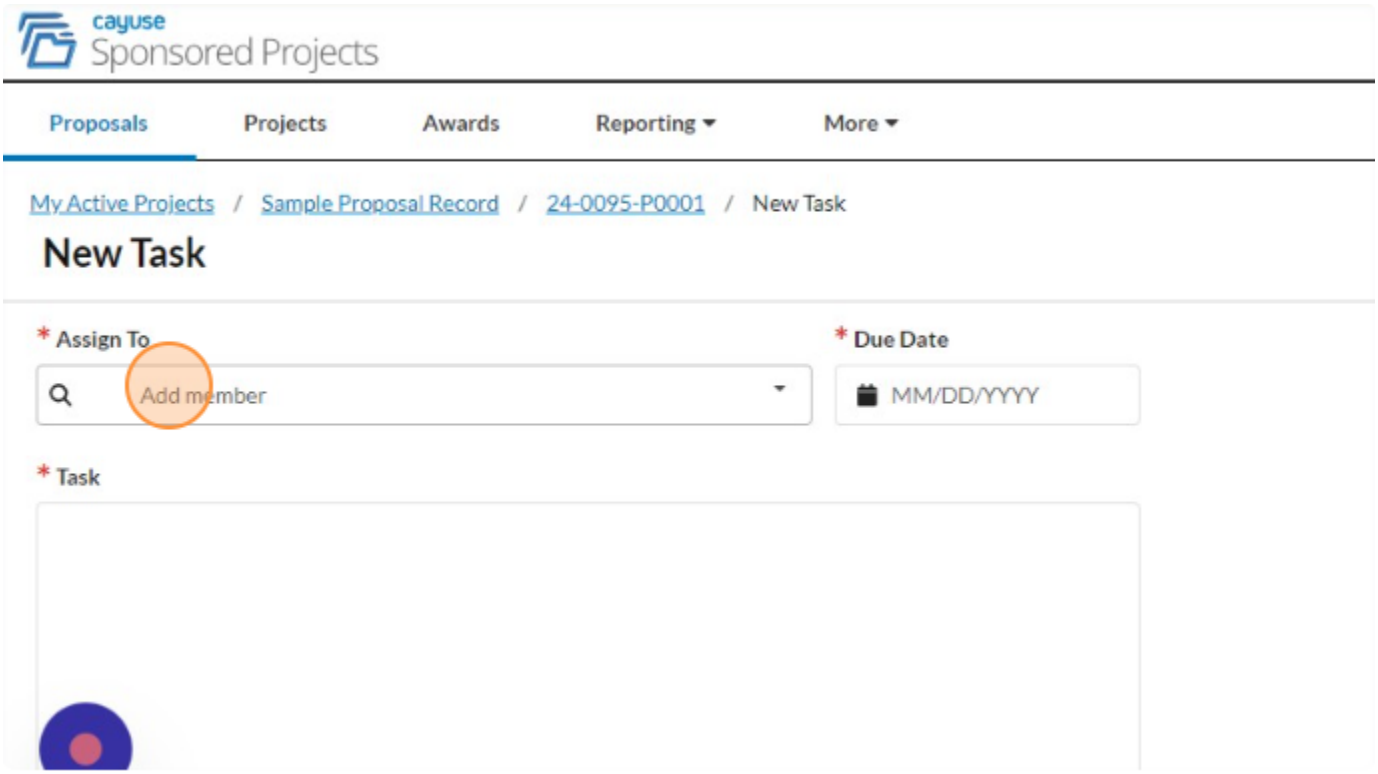
1. The Tasks Tab allows users to assign proposal related tasks to other users.



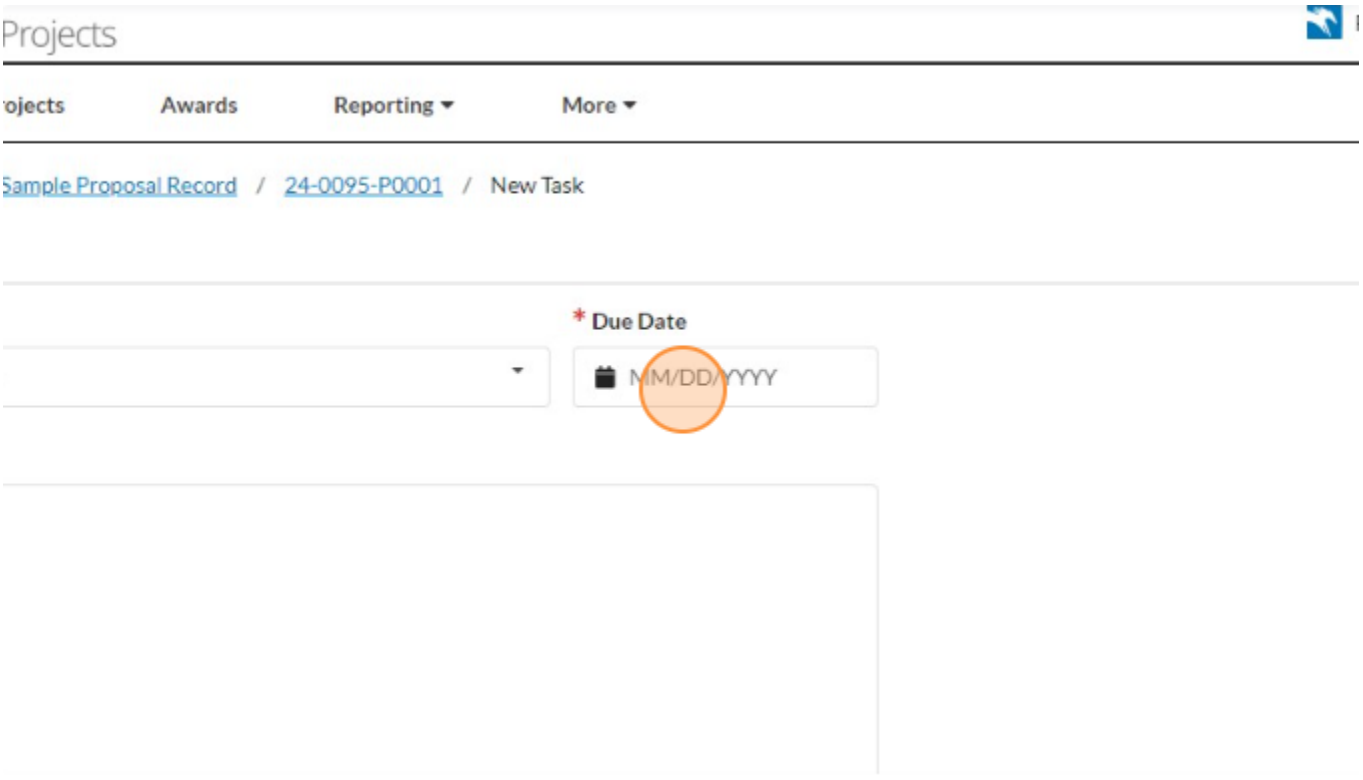

2. Click "New Task"



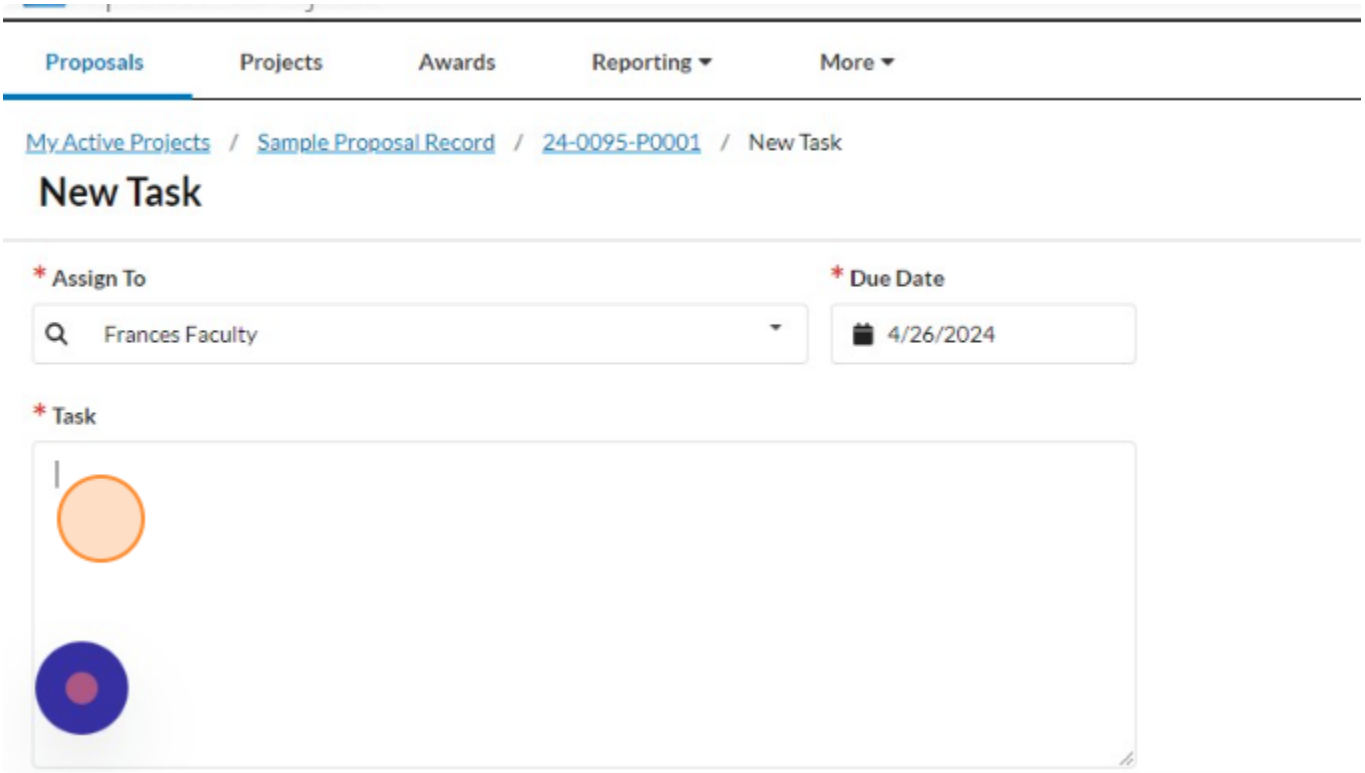
3. Search for the user to be assigned the task.



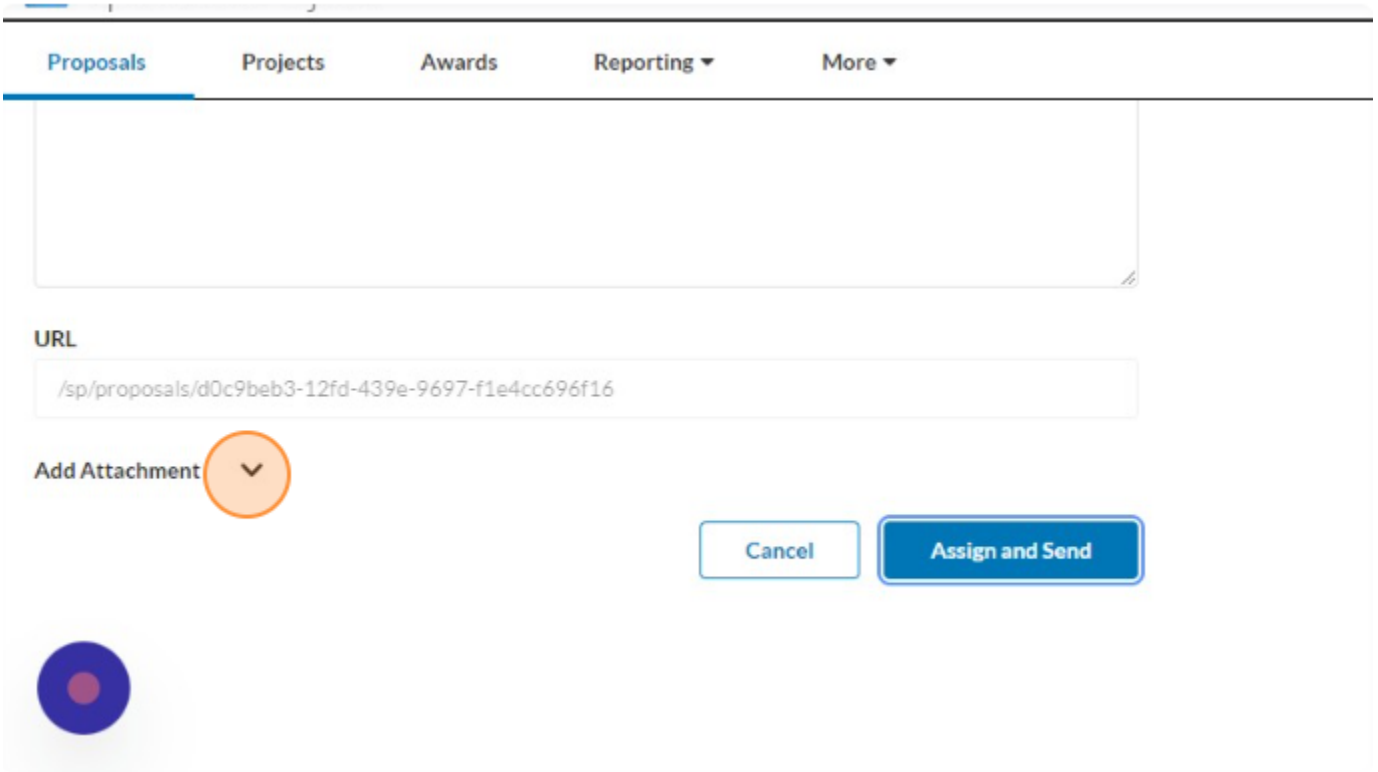

4. Enter the "* Due Date".



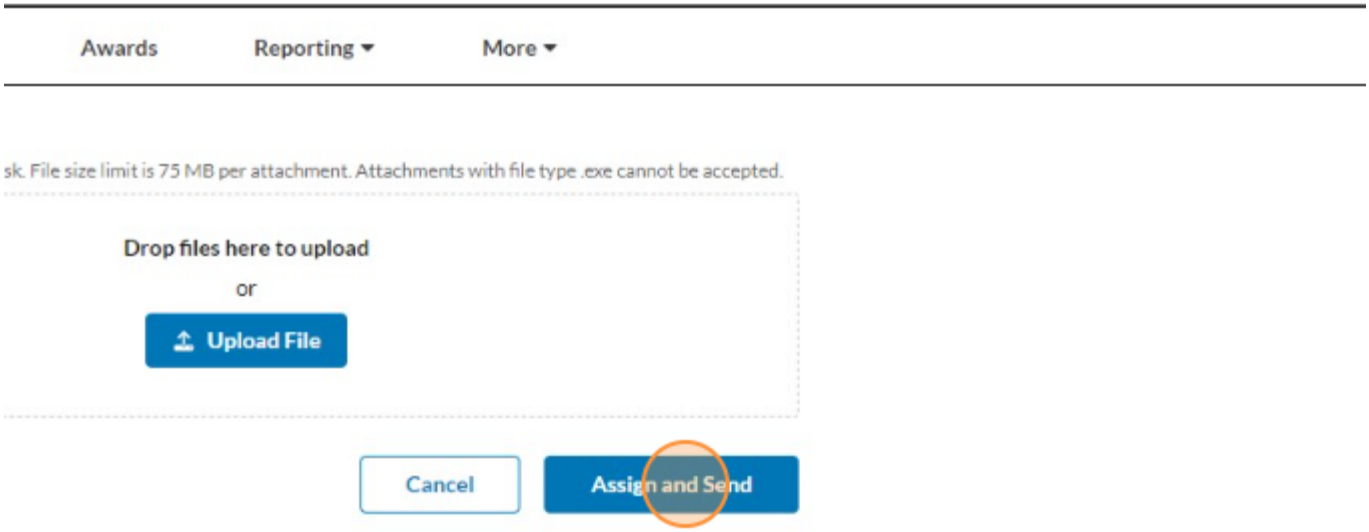
5. Enter the specific task information in the Task field.



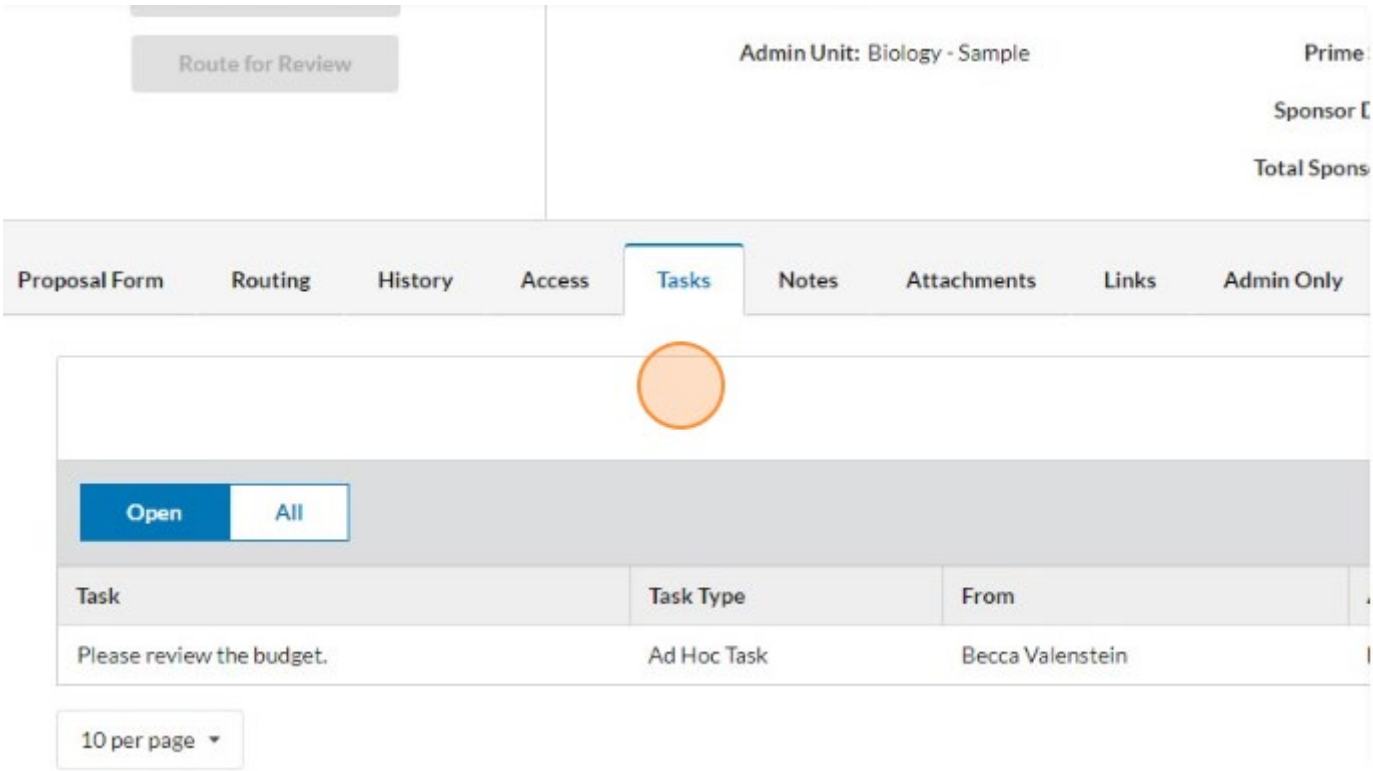

6. If there are associated attachments, click the caret next to "Add Attachment" to upload the file



7. Click "Assign and Send" when finished, which will send an email to the assignee.

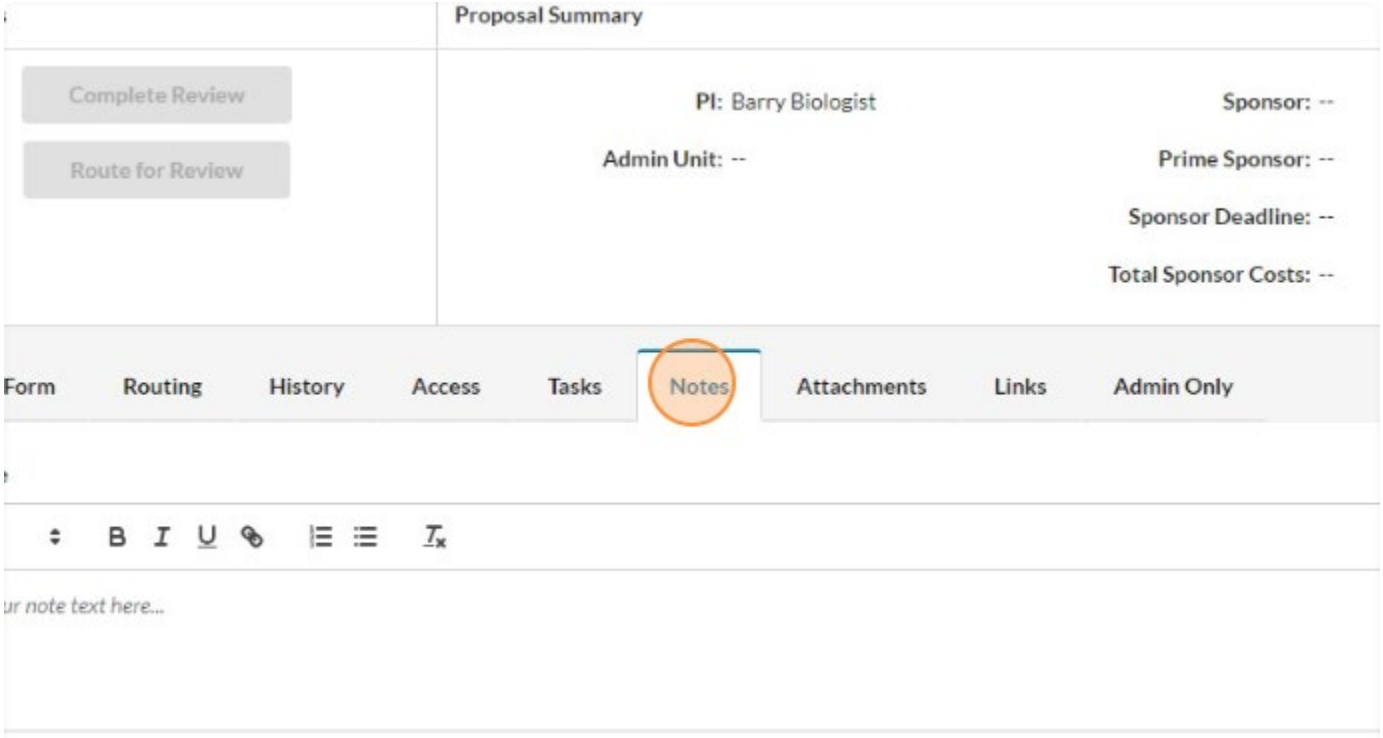



8. The task will be visible at the bottom of the page to all users with access to that record. In addition, the task will appear in My Tasks on the landing page for the task creator and assignee.

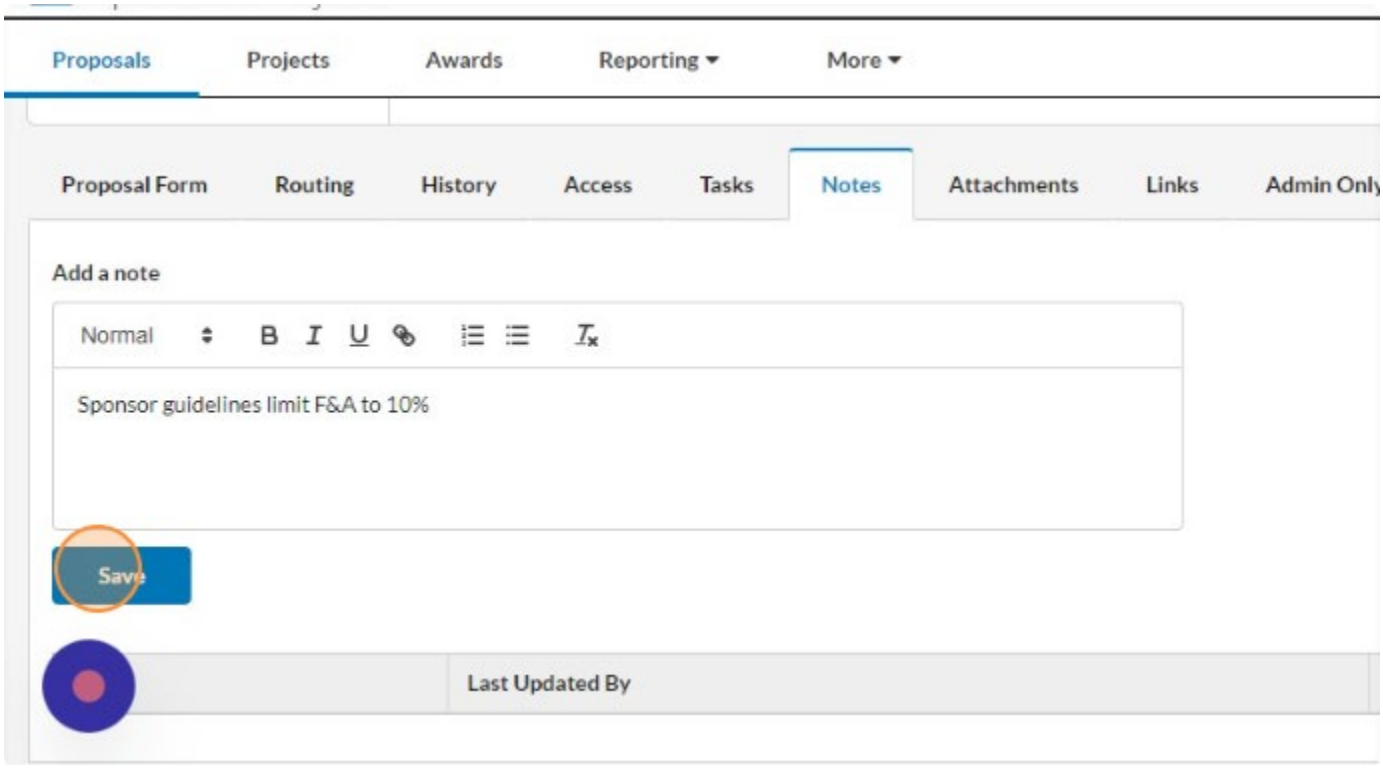


# Notes Tab

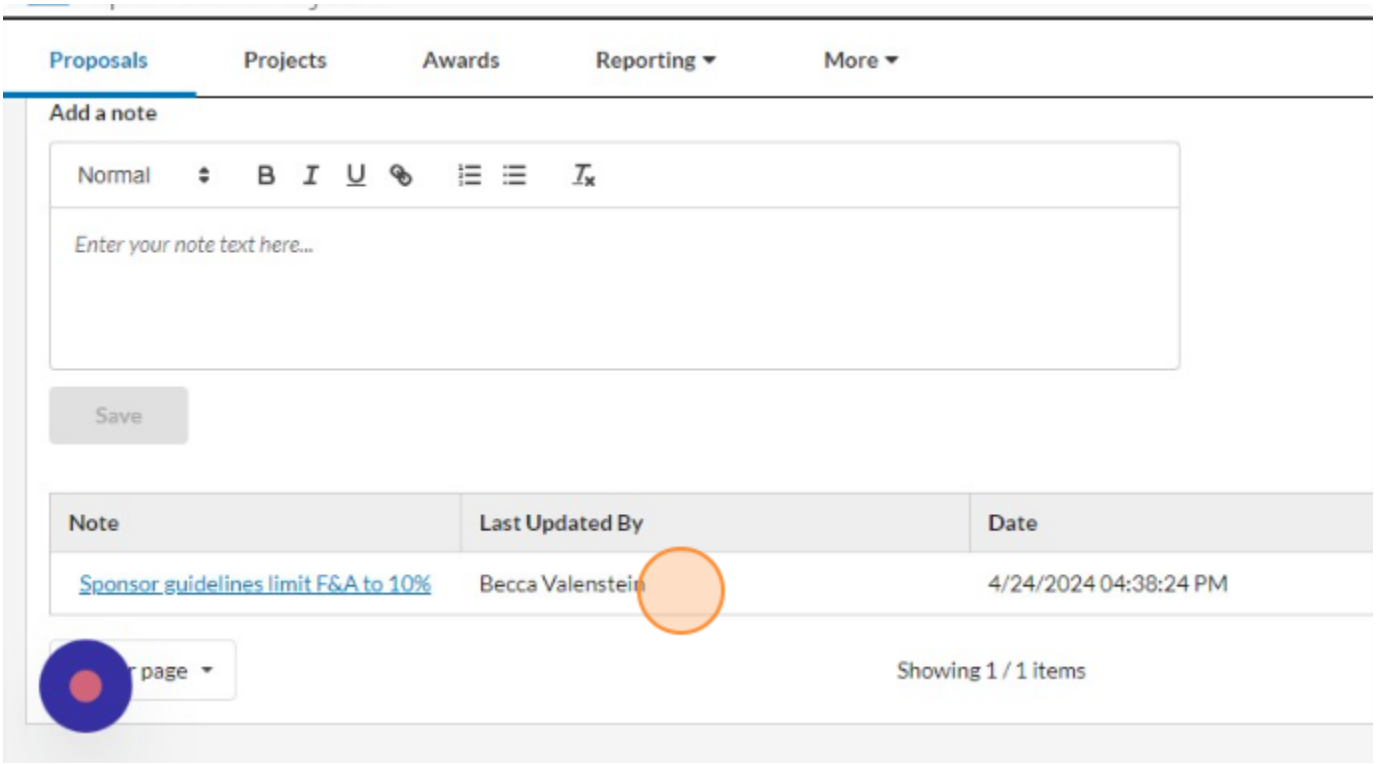
1. The Notes Tab can be used to add information related to a proposal record.




2. Add the note and click "Save"

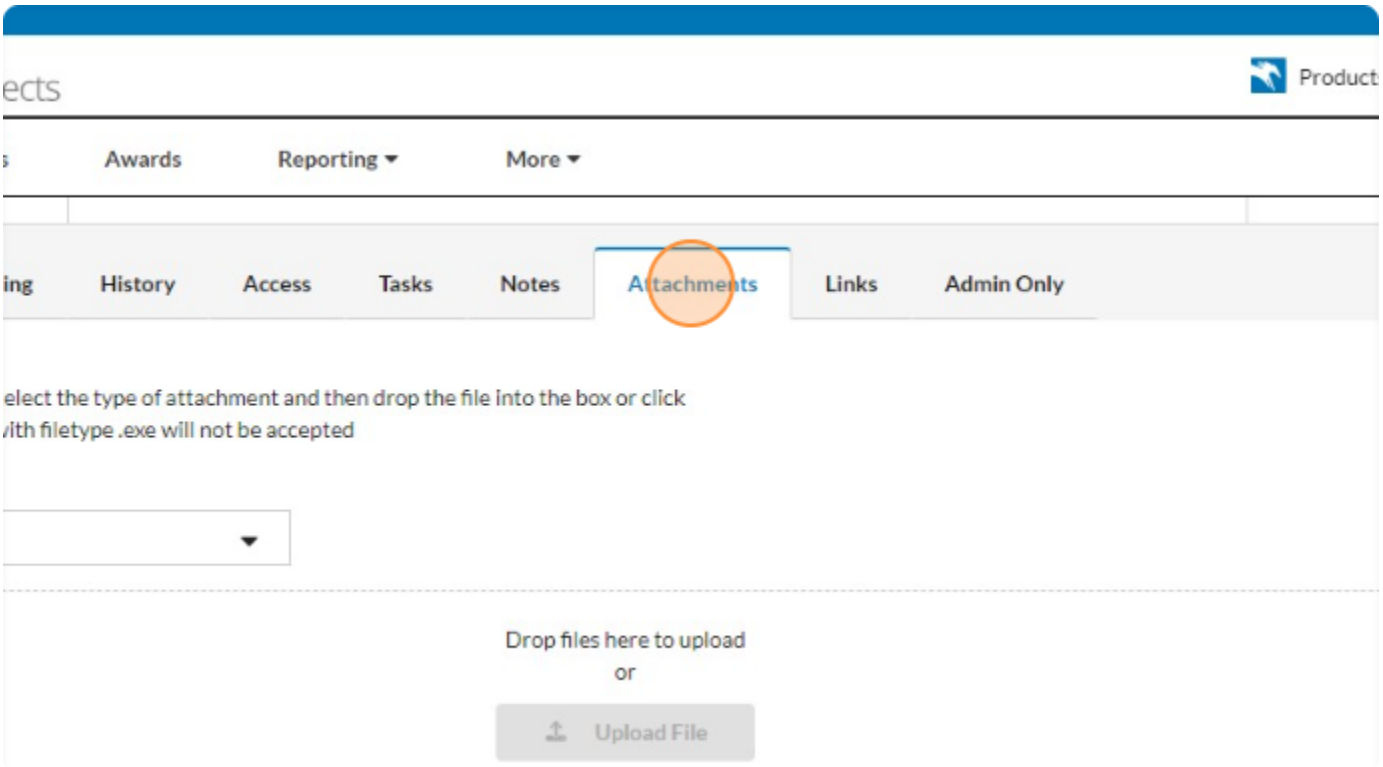


3. Saved notes can be viewed at the bottom of the page, including who made the note and when. Notes can be deleted or edited after they have been saved.

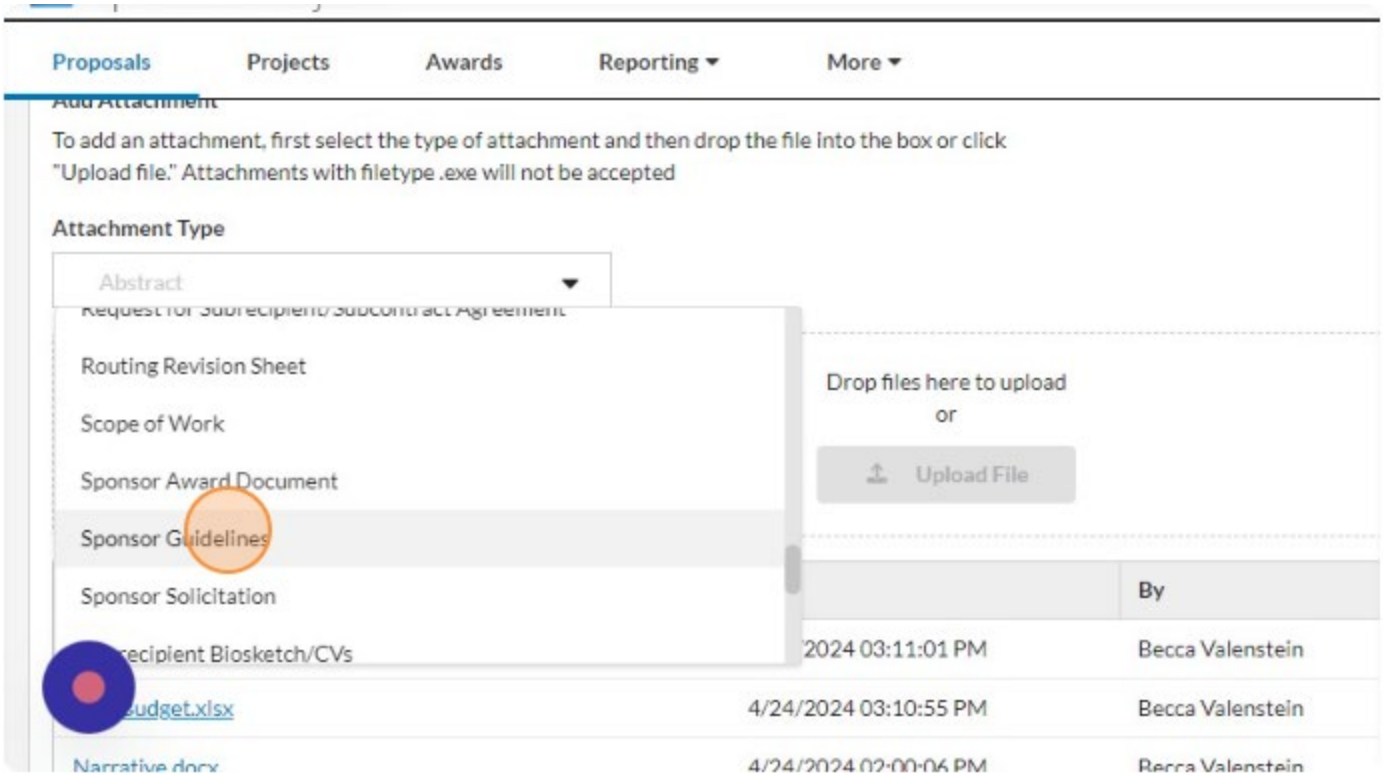


## Attachments Tab

1. The Attachments Tab houses any attachments that are attached within the Proposal Form itself, but users can also upload attachments directly to the Attachments Tab.




2. To upload directly to the Attachments Tab, select the Attachment Type and then upload the file.



3. Documents attached in the proposal form will not have an Attachment Type associated with them and these files cannot be deleted once the Proposal Form is routed.