



# Adding an Attachment to an Executed Contract

## OVERVIEW

The goal of this task is to add an attachment to an executed contract in Total Contract Manager. A variety of attachments can be added to help clarify a contract or provide more information for the parties involved; examples include insurance certificates, vendor correspondence, or the contract close-out form.

Contracts must be in either Draft (when the contract is being created) or an Executed (when the contract has been approved and signed by all parties) status in order to add attachments.

*Adding attachments in Draft status is covered in the Total Contract Manager handbook; contact the State Procurement Bureau for more information.*

## CHECKING OUT THE CONTRACT

To add an attachment to a contract in an Executed status, you must first check out the contract for internal edit.

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts**.
2. Search for the contract to which an attachment will be added, and once found, click on the contract.
3. In the upper right corner of the contract, click the **Contract Actions** drop-down menu, and select **Check Out for Internal Edit**.
4. Click **Yes** to confirm in the pop-up window that displays.

## EXPLORING THE ATTACHMENTS PAGE

1. In the contract creation menu on the left, click **Attachments**.
2. Notice: there is already an attachment that represents the main document of the contract. This is indicated by the small crown symbol .
3. From the **Actions** drop-down menu, there are options to edit the document's properties, download the document for review, upload a new version, un-assign it as the main contract document, or delete it altogether.
4. If eSignature was not used for this contract (as in the case of a historical contract being added) no crown will be seen, and instead, dates for when the contract was fully executed and the contract uploaded will be seen at the top of the page.
5. As attachments are added, they will appear in the displayed list, and all can be downloaded or previewed by clicking the title of the attachment.

## ADDING AN ATTACHMENT FILE

1. To add a file attachment to a contract, click the **Add Attachments** button (or **Add Attachments** from the drop-down menu).
2. In the **Add Attachments** pop-up window that appears:
  - Choose **File** as the **Attachment Type**.
  - Click the **Select Files** button to upload the attachment file.
  - Use the **Print Order** drop-down menu to decide the sequence of attachments when printing the contract.
  - If this attachment should not print with the contract's hard copy, choose **No** next to the **Print with Full Contract** option.
  - Determine if the accessibility and visibility of this attachment should inherit the contract's **Summary Configuration Settings**, or be accessible to **Admin/Managers Only**.
  - Click **Save Changes** to add the document to the contract.

## ADDING AN ATTACHMENT LINK

Contract attachments can be in the form of web links, as well.

1. To add web link attachments to a contract, click the **Add Attachments** button (or **Add Attachments** from the drop-down menu).
2. In the **Add Attachments** pop-up window that appears:
  - Choose **Link** as the **Attachment Type**.
  - Provide the **Page Name** and **URL** of the web address.
  - Use the **Print Order** drop-down menu to decide the sequence of attachments when printing the contract.
  - If this attachment should not print with the contract's hard copy, choose **No** next to the **Print with Full Contract** option.
  - Determine if the accessibility and visibility of this attachment should inherit the contract's **Summary Configuration Settings**, or be accessible to **Admin/Managers Only**.
  - Click **Save Changes** to add the link to the contract.

## CHECKING IN THE CONTRACT

Remember to check the executed contract back in after adding the attachment(s).

1. Return to the **Contract Actions** drop-down menu.
2. Click **Check In**.