

Job Aid: Managing Attachments on Workday Award Page

This job aid provides detailed step-by-step instructions for managing attachments on the Workday award page. Attachments can include documents such as expense activity reports, milestone documentation, PI technical reports, general progress report and travel approval emails.

Prerequisites

Before proceeding, ensure the following:

- You have the necessary permissions to access and manage the attachments on the award page. All Grant Managers or Principal Investigators (PIs) should have access to manage attachments on their assigned Awards.
- You are logged into Workday with your credentials.

Step-by-Step Instructions

Adding an Attachment

This section details how to attach a new document, such as a PI technical report or a travel approval email, to the award page.

1. **Navigate to the Award Page:**
 - Access the Workday home page, Search Award number or name in the Workday search bar.
 - Locate and open the specific award you want to manage attachments.
2. **Locate the Attachments Section:**
 - On the award page, look for the Related Action next to the award name.
3. **Add a New Attachment:**
 - Click on "Related Action" next to the Award Name.
 - Click on the Arrow (>) next to Award under Action to locate "Manage Attachments".
 - A file selection dialog will appear. Select the file you want to attach from your local computer.
 - Provide any required information, such as:
 - **Comments:** Enter a brief comment on the document
 - **Category:** Select the appropriate category for the document from a dropdown, if available. Examples might include Sponsor approval, Notice of Award.
 - Click "OK" to attach the file to the award record.

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- Click “Done” to complete attaching files.

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MENU  AWD-103716

AWD-103716: GEORGIA GEAR UP 08/29/2016 (version 10)

Sponsor Award Reference Number: P334S160030
 Sponsor: US DEPT OF EDUCATION/GENERAL

Overview | Award Lines | Budget | Award Tasks | Billing & Receivable

Summary | Sponsor | Funding Details | SABER - PEB | Award History - GTCR | Notes

Company: C0503 Georgia Institute of Technology
 Name: GEORGIA GEAR UP
 Description: GEORGIA GEAR UP
 Award Lifecycle Status: Close Out
 Sponsor Award Reference Number: P334S160030
 Award Date: 08/29/2016
 Award Signed Date: 08/29/2016
 Award Type: Grant

Actions

- Award
- Additional Data
- Audits
- Budget Template
- Business Process
- Customer Contract
- Customer Invoice
- Favorite
- Integration IDs
- Reporting
- Roles

Award

- View Award History
- View Award Task Status
- Amend Award
- Copy
- Create Billing Schedule
- Create Customer Invoice for Award Grant Transactions
- Create Award
- Find Subrecipients
- Maintain Award Tasks
- Maintain Subawards
- Maintain Billing Status for Award Grant Transactions
- Manage Attachments**
- Correct

Bill-To Sponsor: US DEPT OF EDUCATION/GENERAL
 Award Schedule: GEORGIA GEAR UP
 Currency: USD
 Award Total: 28,343,435.00
 Billed Amount: 20,789,548.07

Award Manage Attachments

Award AWD-103716: GEORGIA GEAR UP 08/29/2016 (version 10)

Attachments

Drop files here

or

Select files

OK Cancel

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Award Manage Attachments

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Attachments

test attach.xlsx
 Successfully Uploaded!

Comment	Test
Attachment Category	<input type="text" value="Search"/> <ul style="list-style-type: none"> <input type="radio"/> Financial Report Template ⋮ <input type="radio"/> Notice of Award ⋮ <input type="radio"/> Sponsor Approval ⋮ <input type="radio"/> Sponsor Billing Instructions ⋮ <input type="radio"/> Sponsor Invoice Template ⋮

Viewing an Attachment

This section explains how to access and view an attached document, useful for reviewing grant-related files.

1. **Navigate to the Award Page:**
 - Follow the same steps as above to open the specific award page.
2. **Locate the Attachments Section:**
 - Find the "Attachments" tab on the award page.
3. **View the Attachment:**
 - Click on the name or link of the attachment you want to view. The file will open in a new tab or window, or display inline, depending on the file type

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(e.g., PDF, Word document) and Workday's settings. Supported file types typically include PDFs, Word documents, and Excel files..

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Sponsor Award Reference Number	P334S160030	Sponsor Direct Cost / Sponsor Facilities And Administration	20,161,392.00 / 838,608.00	Award Contract Dates	08/29/2016 - 12/01/2026
Sponsor	US DEPT OF EDUCATION/GENERAL	Cost Share Total	7,343,435.00	CFDA Assistance Listing	84.334 - Gaining Early Awareness and Readiness for Undergraduate Programs

Overview | Award Lines | Budget | Award Tasks | Billing & Receivables | Additional Data | Additional Reports | Amendments | Set Up & History

Summary | Sponsor | Funding Details | SABER - PEB | Award History - GTCR | Notes | Attachments

Attachments 1 Item

Attachment	Comment
test attach.pdf	test

Editing an Attachment

Workday typically stores attachments as read-only files, meaning direct editing is not supported. To update an attachment, you must delete the existing file and upload a new version.

- Delete the Old Attachment:**
 - Follow the steps in the "Deleting an Attachment" section below to remove the current file.
- Add the Updated Attachment:**
 - Follow the steps in the "Adding an Attachment" section to upload the new version of the file, ensuring you to update the description and category as needed.

Deleting an Attachment

This section covers removing an attachment from the award page, useful for cleaning up outdated or incorrect files.

- Navigate to the Award Page:**
 - Open the award page as described in the navigation steps.
- Locate the Award Manage Attachments Page:**
 - Click on "Related Action" next to the Award Name.
 - Click on the Arrow (>) next to Award under Action to locate "Manage Attachments".
 - Click on "Manage Attachments".
- Delete the Attachment:**
 - Click on the "Recycle Bin" icon next to the attachment you want to delete.

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Sponsor Award Reference Number P334S160030
 Sponsor US DEPT OF EDUCATION/GENERAL

Overview | Award Lines | Budget | Award Tasks | Billing & Receivable

Summary | Sponsor | Funding Details | SABER - PEB | Award History - GTCR | Notes

Company CO503 Georgia Institute of Technology
 Name GEORGIA GEAR UP
 Description GEORGIA GEAR UP
 Award Lifecycle Status Close Out
 Sponsor Award Reference Number P334S160030
 Award Date 08/29/2016
 Award Signed Date 08/29/2016
 Award Type Grant

Actions

- Award
- Additional Data
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Bill-To Sponsor US DEPT OF EDUCATION/GENERAL
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Award Manage Attachments

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Attachments

test_attach.pdf
 Uploaded by Min Zhang

Comment test

Attachment Category

Upload

7 minutes ago

Additional Features and Considerations

- Searching for Attachments:** If there are multiple attachments, you may use a filter within the "Attachments" section to find specific files by Attachment, Comment, or Attachment Category. This is particularly useful for large grant portfolios.

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[Overview](#)
[Award Lines](#)
[Budget](#)
[Award Tasks](#)
[Billing & Receivables](#)
[Additional Data](#)
[Additional Reports](#)
[Amendments](#)
[More](#)

[Summary](#)
[Sponsor](#)
[Funding Details](#)
[SABER - PEB](#)
[Award History - GTCR](#)
[Notes](#)
[Attachments](#)

Attachments 2 items

Attachment	Comment	Attachment Category
 test attach.pdf	test	
 test attach.xlsx	Test 2	Sponsor Approval

- Attachment Limits:** Be aware that Workday may have limits on file size (commonly 50MB or less, depending on configuration) and supported file types (e.g., PDF, DOCX, XLSX).

Troubleshooting

If you encounter issues, consider the following:

- Upload Issues:** Ensure the file size is within Workday's limits and that the file type is supported. Common supported types include PDFs, Word documents, and Excel files.
- Missing Manage Attachments:** If you cannot find the "Manage Attachments" Please create a Service Now ticket.

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