

Quick Guide

How to Add, Update, or View History for Files in SmartForms

This quick guide provides information on how to add a file, update a file, or view a file's history in a Study's SmartForm pages. This also includes how to remove a file.

WHO:

- Principal Investigators (PIs)
- Study Teams

WHEN:

- Adding a file, updating a file, or viewing a file's history in a Study's SmartForm.

HOW:

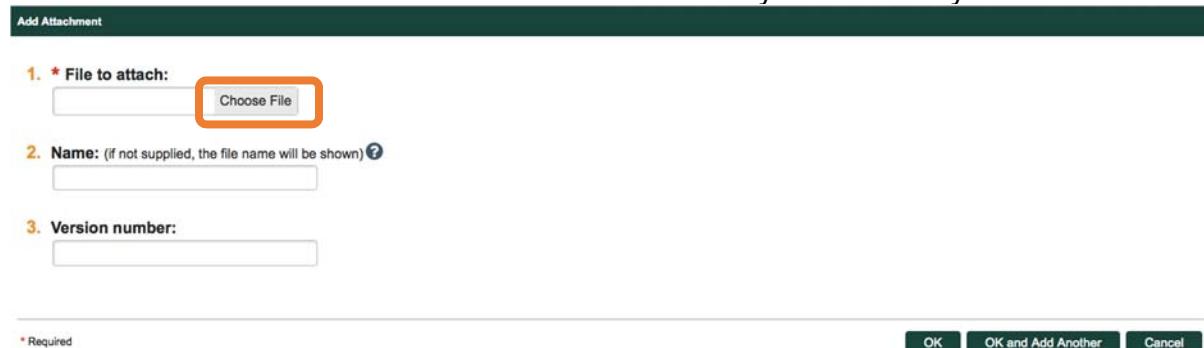
1. If you need to add a file:

- a. When presented with the requirement or option to add a file in a SmartForm, select the "+ Add" button.

**Note**

- The SmartForm must be in a state that allows editing to add or update files within it, such as Pre-Submission, Clarification Requested (Pre-Review), Clarification (Designated Review), or Modification Required.

- b. Select "Choose File" and choose the file to add from your file library.

**Note**

- Examples of file types that can be added include MS Word, PDF, JPG, PNG, and MP3.
- If you have difficulty uploading a file based on the type or size, please contact the Click Help Desk at clickhelpdesk@msu.edu or 517-355-2000.

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- c. Optional: Enter a file name, if you so choose.

Add Attachment

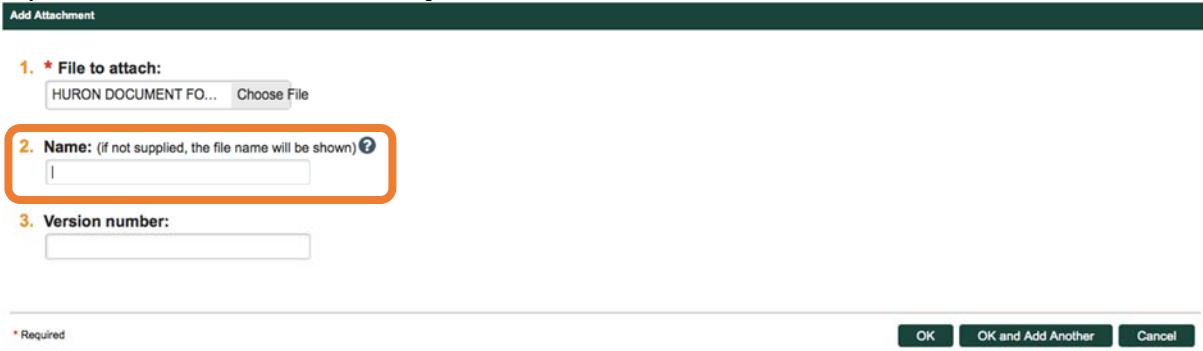
1. * File to attach:
HURON DOCUMENT FO... Choose File

2. Name: (if not supplied, the file name will be shown) ?

3. Version number:

* Required

OK OK and Add Another Cancel



Note

- If you do not enter a name, the name will default to the file name.

- d. Optional: Enter a version, if you so choose.

Add Attachment

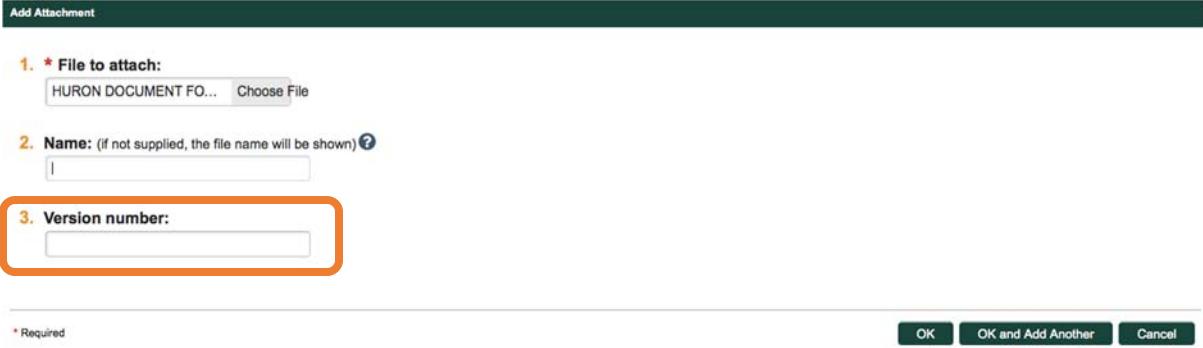
1. * File to attach:
HURON DOCUMENT FO... Choose File

2. Name: (if not supplied, the file name will be shown) ?

3. Version number:

* Required

OK OK and Add Another Cancel



Note

- If you do not enter a version, the system will automatically version the file.
- If you enter a version, it must be in a numeric format.

- e. Optional: If you have more than one file to add, you can select "OK and Add Another" to add more files. Continue until you have added all files.

Add Attachment

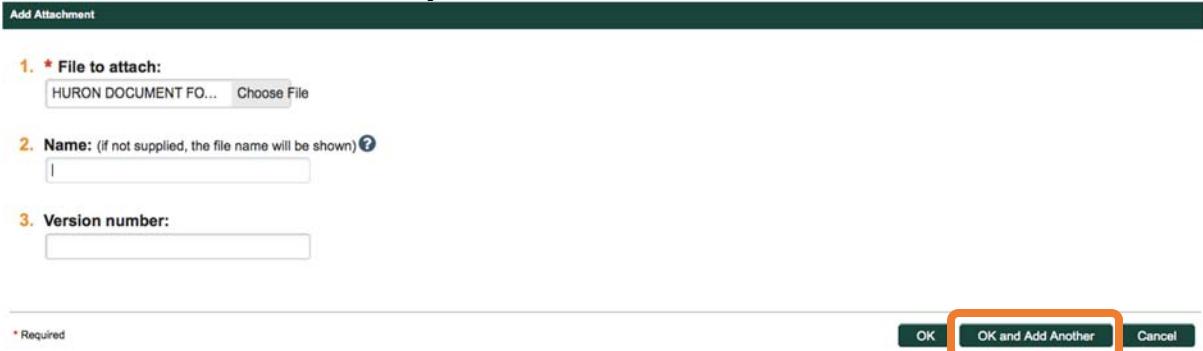
1. * File to attach:
HURON DOCUMENT FO... Choose File

2. Name: (if not supplied, the file name will be shown) ?

3. Version number:

* Required

OK OK and Add Another Cancel



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- f. Select the “OK” button to complete the Add Attachment action.

1. * File to attach:
HURON DOCUMENT FO... Choose File

2. Name: (if not supplied, the file name will be shown) ?
[]

3. Version number:
[]

* Required

OK OK and Add Another Cancel

- g. After a file is added, the system will populate with the file name and version, category, date modified, and a link to file history.

Document	Category	Date Modified	Document History
<input checked="" type="checkbox"/> Update HURON DOCUMENT FOR SANDBOX.docx(0.01)	IRB Protocol	11/19/2017	History

Note

- Category populates based on where the file is uploaded within the SmartForm pages.
- Date Modified populates with the date the file was added.
- You can add more files by selecting “+ Add.”

2. If you need to update a file:

- a. Locate the file you would like to update (if there is more than one file), and select the “Update” button next to the file name.

Document	Category	Date Modified	Document History
<input checked="" type="checkbox"/> Update HURON DOCUMENT FOR SANDBOX.docx(0.01)	IRB Protocol	11/19/2017	History

- b. After you select Update, you are able to replace the file. Select “Choose File” to choose the updated file, enter name and version number (if you so choose), and select “OK.”

1. * File to attach:
HURON DOCUMENT FOR SANDBOX.docx(0.01)

2. Name: (if not supplied, the file name will be shown) ?
[]

3. Version number:
[]

* Required

OK OK and Add Another Cancel

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3. If you need to remove a file, select the “x” button to the right of the file information.

* Attach the protocol: ?



Document	Category	Date Modified	Document History
Protocol(1.1)	IRB Protocol	11/19/2017	History
HURON DOCUMENT FOR SANDBOX.docx(0.02)	IRB Protocol	11/19/2017	History



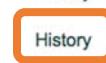
4. If you would like to view the file history:

- a. Locate the file you would like to view history of (if there is more than one file) and select the “History” link under Document History.

* Attach the protocol: ?



Document	Category	Date Modified	Document History
Protocol(1.1)	IRB Protocol	11/19/2017	History
HURON DOCUMENT FOR SANDBOX.docx(0.02)	IRB Protocol	11/19/2017	History



- b. The history of the file displays.

Resource History for HURON DOCUMENT FOR SANDBOX.docx

Help

Title: HURON DOCUMENT FOR SANDBOX.docx
File: HURON DOCUMENT FOR SANDBOX.docx
Owner: ra15 ra15
Author:
Content Type: Document
Version: 0.02
Description:

History:

Date	Version	Person	Action	Notes	Uploaded File
11/19/2017 1:51 PM	0.02	ra15 ra15	File Uploaded & Edited		HURON DOCUMENT FOR SANDBOX.docx
11/19/2017 1:50 PM	0.01	ra15 ra15	Created		HURON DOCUMENT FOR SANDBOX.docx

OK

- c. The history includes links to previously uploaded files (if any). Select the uploaded file link to view the file.

Resource History for HURON DOCUMENT FOR SANDBOX.docx

Help

Title: HURON DOCUMENT FOR SANDBOX.docx
File: HURON DOCUMENT FOR SANDBOX.docx
Owner: ra15 ra15
Author:
Content Type: Document
Version: 0.02
Description:

History:

Date	Version	Person	Action	Notes	Uploaded File
11/19/2017 1:51 PM	0.02	ra15 ra15	File Uploaded & Edited		HURON DOCUMENT FOR SANDBOX.docx
11/19/2017 1:50 PM	0.01	ra15 ra15	Created		HURON DOCUMENT FOR SANDBOX.docx

OK