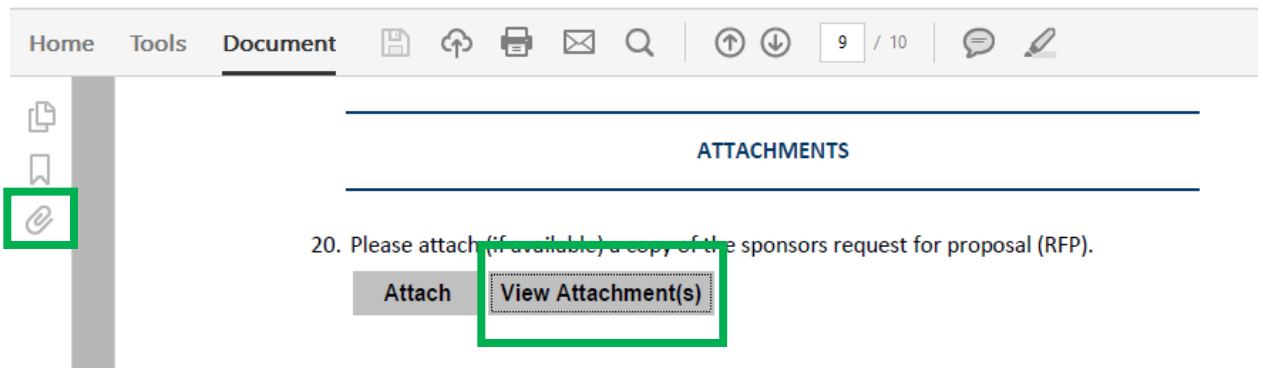# Working with Sub-Forms

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INSTRUCTIONS

1. To view the sub-forms, click on the '**View Attachements**' or select the '**Paperclip**' on the left menu bar.

2. After you click on the 'View Attachments' or 'Paperclip' button a '**Dialog Box**' will open that will allow you to select the sub-forms you want to work on. Double click on the sub-form that you want enter data – **This will open the desired sub-form.**
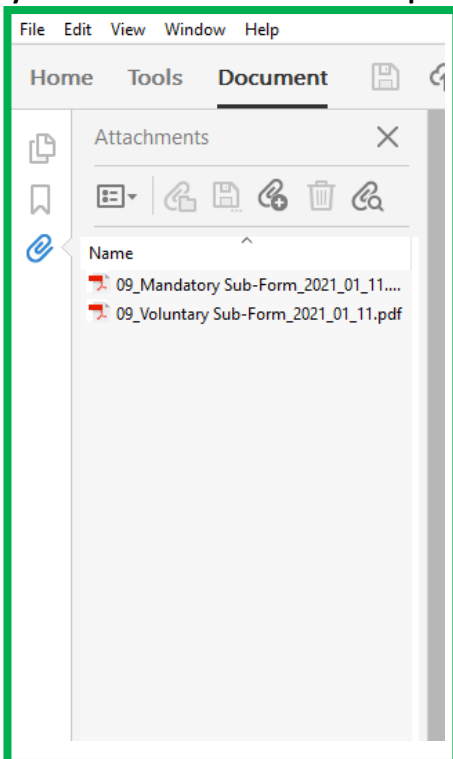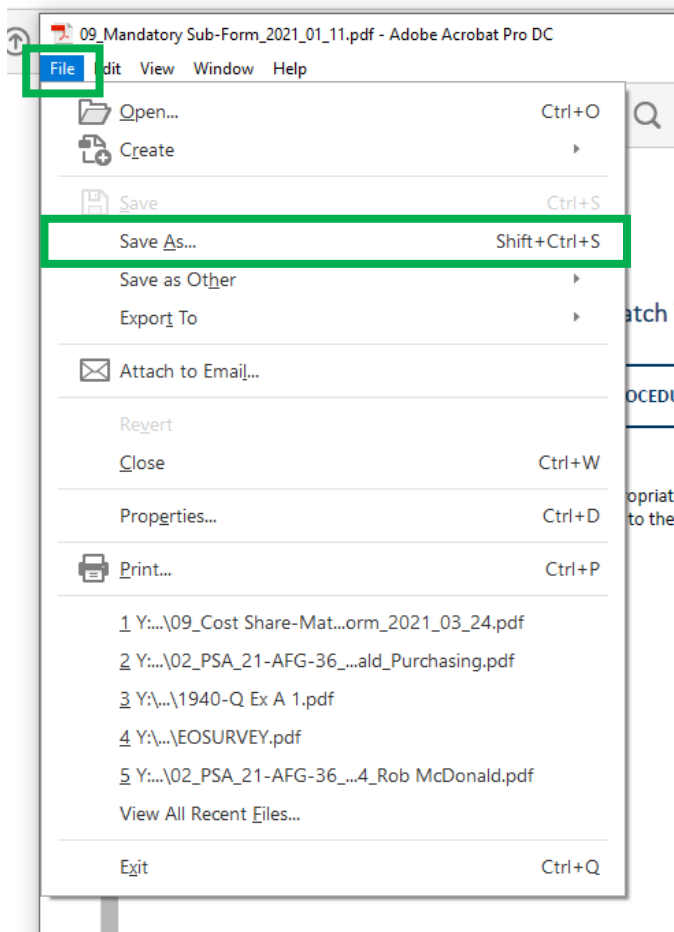
3. **After the selected sub-form has opened you may see a 'Notification'.**

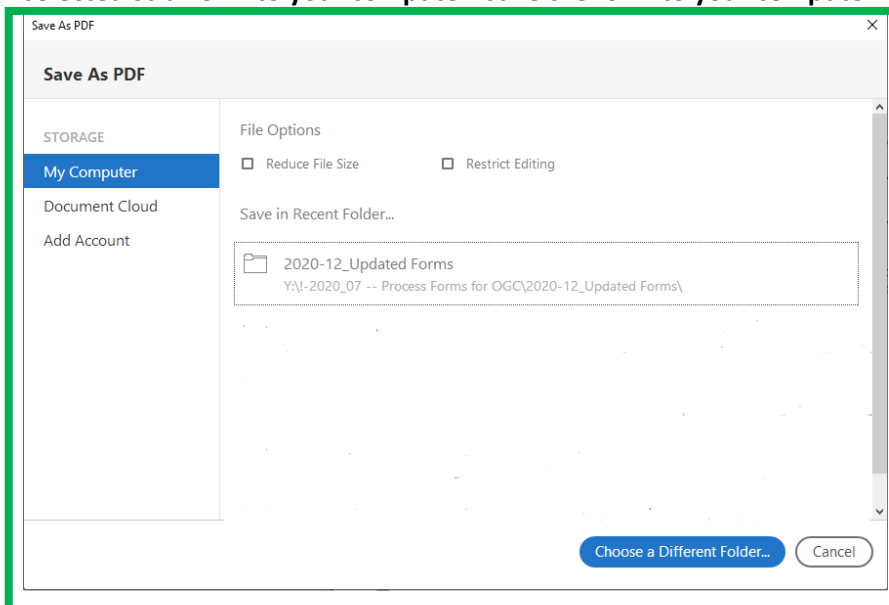**If you SEE a 'Notification' similar to the ones below Click Here.**

If you DO NOT SEE a 'Notification' similar to the ones below Click Here.
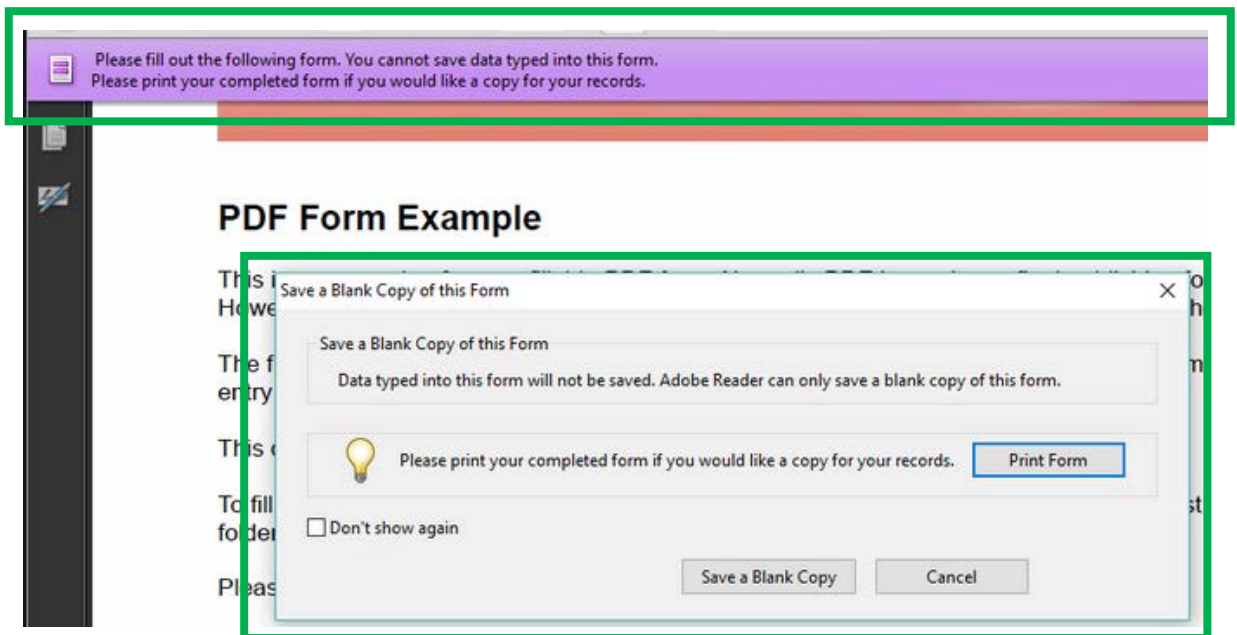
4. **Click on the 'File' button and select 'Save As'.**

5. **After you click on the 'Save As' button a 'Dialog Box' will open that will allow you to save the selected Sub-Form to your computer. Save the form to your computer.**

6. Complete the applicable fields on the sub-form and click the 'Save' button.

Mandatory Cost Share / Match Amounts per Category	
Expense Categories	**Year 1**
Personnel	
1 Salary	$ 0.00
2 Fringe & Benefits	$ 0.00
Travel	
1 Domestic	$ 0.00
2 International	$ 0.00
Materials & Supplies (i.e., includes equipment less than $5000)	$ 0.00
Capital Equipment (i.e., items greater than or equal to $5000)	$ 0.00
Miscellaneous (i.e., items that do not align with other categories)	$ 0.00
Sub-Awards	

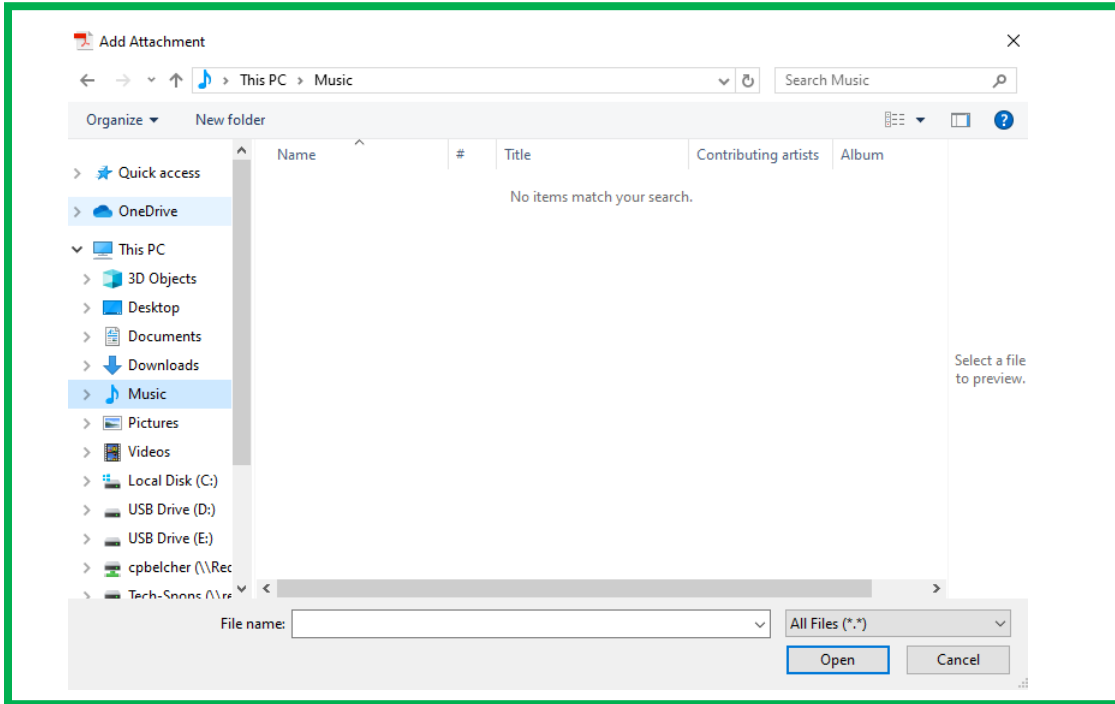**7. Select the 'Attach' button on the Main PDF Form.**

ATTACHMENTS

20. Please attach (if available) a copy of the sponsors request for proposal (RFP).
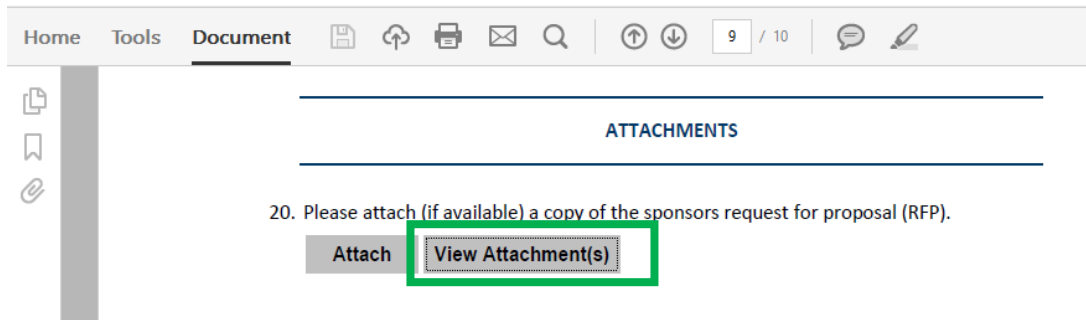
Attach   View Attachment(s)

8. **After you click on the 'Attach' button a 'Dialog Box' will open that will allow you to select the folder and document you want to attach.**


9. **Select the sub-form that you want to attach to the Main PDF, click the 'Open' button.**
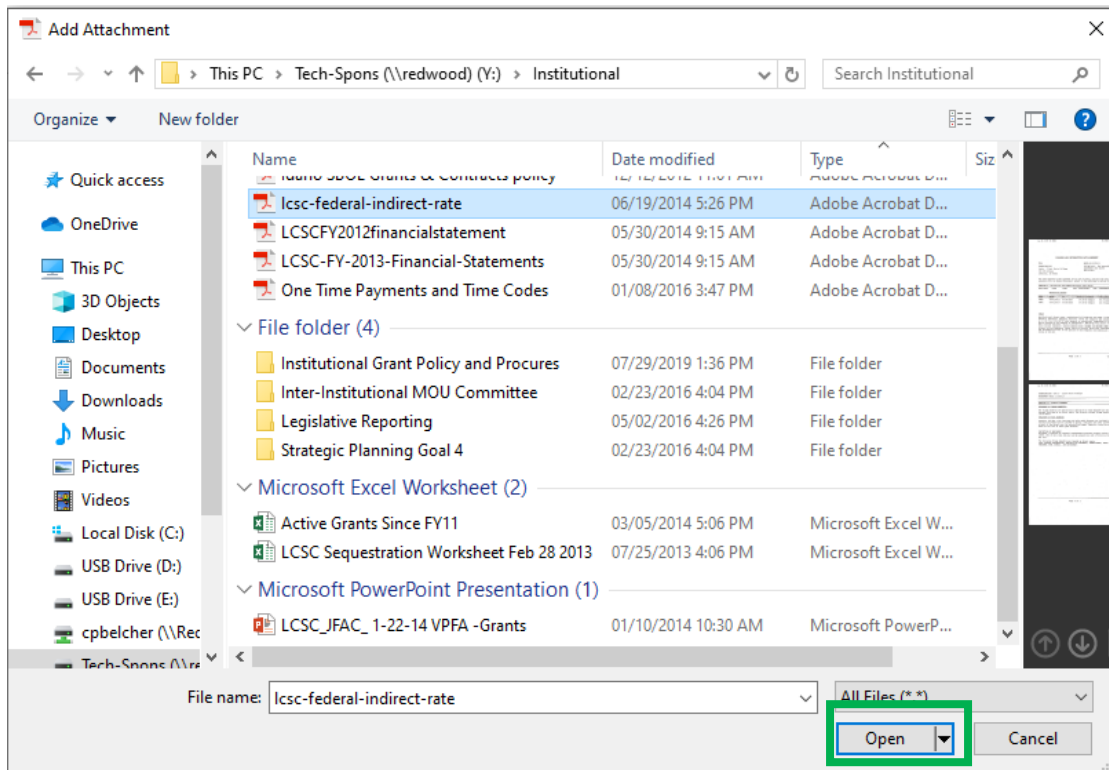
10. After you have clicked the 'Open' button the selected sub-form will be attached to your PDF. To view which sub-forms are attached to your PDF click the 'View Attachments' button.

11. After you have clicked the 'View Attachments' button a 'Side Menu' will open on the PDF which will show you what sub-forms you have attached to the PDF. To hide the 'Side Menu' click the 'View Attachments' button again.
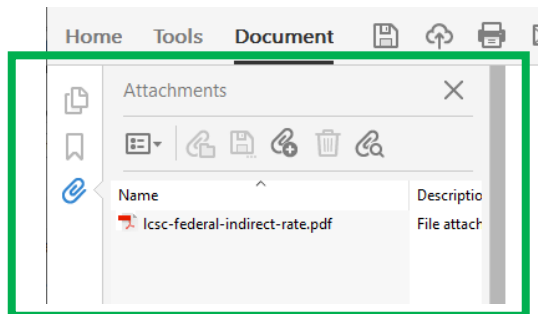
Repeat steps 4 to 11 for each applicable Sub-Form.

12. Complete the applicable fields on the sub-form and click the 'Save' button.

Repeat step 12 for each applicable Sub-Form.