

General Documents-Add

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The Add button is used to attach an existing document to the list of General Documents. An existing document could be a MSWord document, and Excel workbook or any other file type that is currently saved on your computer hard drive or in a public folder. Follow the steps below to add one or more existing documents to the General Documents list.

1. To add an existing document to the list of General Documents, click the Add button located at the lower right of the General Document list.

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2. The Document Add form will be displayed. A User may add one or multiple documents at one time. In the header section of the Document Add form, enter a Description for the document. Select the appropriate Security Level from the drop-down list. Select the appropriate Document Type from the drop-down list.

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3. Once the header information has been filled in, navigate to the grid area below the header to locate the document. Click the to the right of the File field; the Windows File Explorer will open. Locate and select the file to be attached then double-click on the file name. If you want to add more than one file, highlight the first file, then hold down the CTRL key on your keyboard to select additional files.

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4. The File name, Description, Security Level and Document Type will fill in on the first line of the file grid area. If additional documents are being added at this time, proceed to the next line in the file grid and follow the instructions from step 3 above. Continue until all documents to be attached are listed. As each new file is added to the file grid, the Description, Security Level and File Type (Document Type) will default from the information that was entered in the header area of the Document Add form. Modify each file line with the appropriate selections.

5. Once the document list is complete, click the Upload button located at the lower right of the Document Add form. The documents will be added and displayed in the General Documents list.